Oracle® HTML Quoting

Concepts and Procedures

Release 11*i*

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

Part No. A92192-01

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

Part No. A92192-01

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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle HTML Quoting Concepts and Procedures*.

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 describes the concepts the user must understand in order to use Oracle HTML Quoting.
- Chapter 2 describes the Oracle HTML Quoting functions and user interface, and procedures for sales representatives and other personnel to create and subsequently modify quotes

- Appendix A provides flows for the Oracle HTML Quoting user interface (UI) pages, and descriptions of the user interface pages and their buttons, links, forms, and fields.

Typographic Conventions

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

Convention	Meaning
italic text	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.

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 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

Oracle HTML Quoting Implementation Guide, Release 11i

This document provides users with information on implementing Oracle HTML Quoting, including procedures for setting up sales representatives to use the application, and descriptions of Oracle HTML Quoting's integration with other Oracle applications.

Oracle Sales Online Concepts and Procedures, Release 11i

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

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

Oracle*MetaLink*

Oracle*MetaLink* 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 Oracle*MetaLin*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 Oracle*MetaLink* 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 HTML Quoting

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

- Overview of Understanding Oracle HTML Quoting
- Understanding The Sales Representative Roles
- Understanding Quote Statuses
- Process Flows

1.1 Overview of Understanding Oracle HTML Quoting

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

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

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

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

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

1.2 Understanding The Sales Representative Roles

Oracle HTML Quoting has Sales Representative user roles that system administrators or sales managers assign when setting up new users.

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

When you log in to Oracle HTML Quoting, your home page contains a default listing of quotes created by yourself and filtered by certain criteria, such as quote status. See Section 2.2, "The Quote Listing Page" for more information about the Quote Listing page.

1.3 Understanding Quote Statuses

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

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

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

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

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

1.4 Process Flows

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

- View and search for quotes
- Create quotes
- Modify quotes
- Copy quotes
- Append quotes

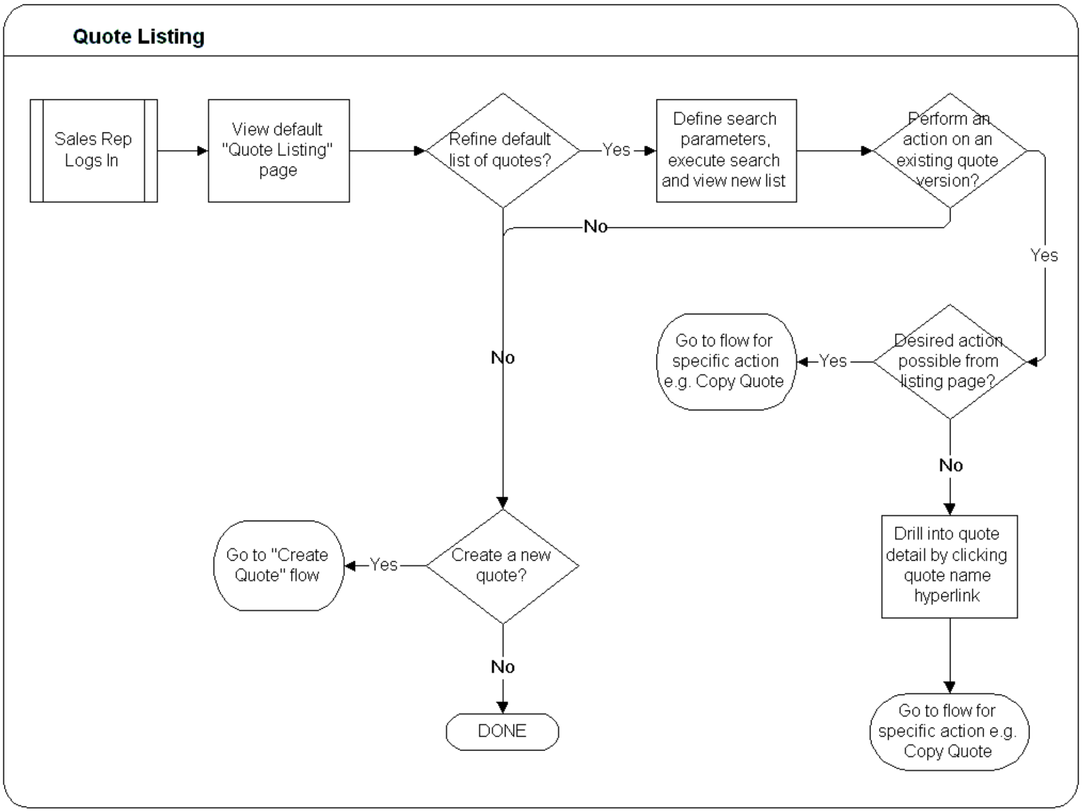
- Enter shipping information for quotes
- Enter billing information for quotes
- Convert quotes into orders

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

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

1.4.1 Process Flow for Viewing and Searching for Quotes

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



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

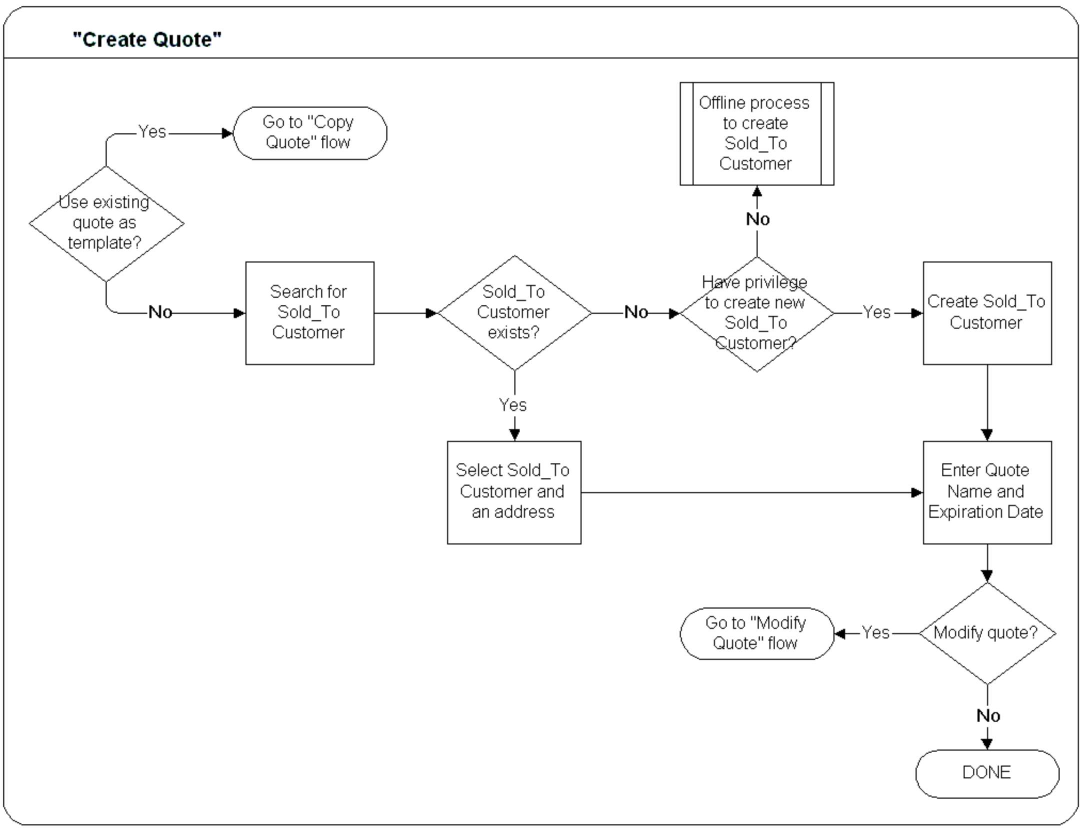
If you decide to refine the quote list, you can define the search parameters, execute a search, and view the results.

From the default list of quotes or the search results, you can initiate an action on an existing quote version either from the listing page or from the quote detail, which is available by clicking the quote name hyperlink. When you initiate an action on an existing quote version, you enter the process flow for that action. Possible actions include modifying, copying, appending, inactivating, and viewing more versions of a quote.

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

1.4.2 Process Flow for Creating a Quote

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



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

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

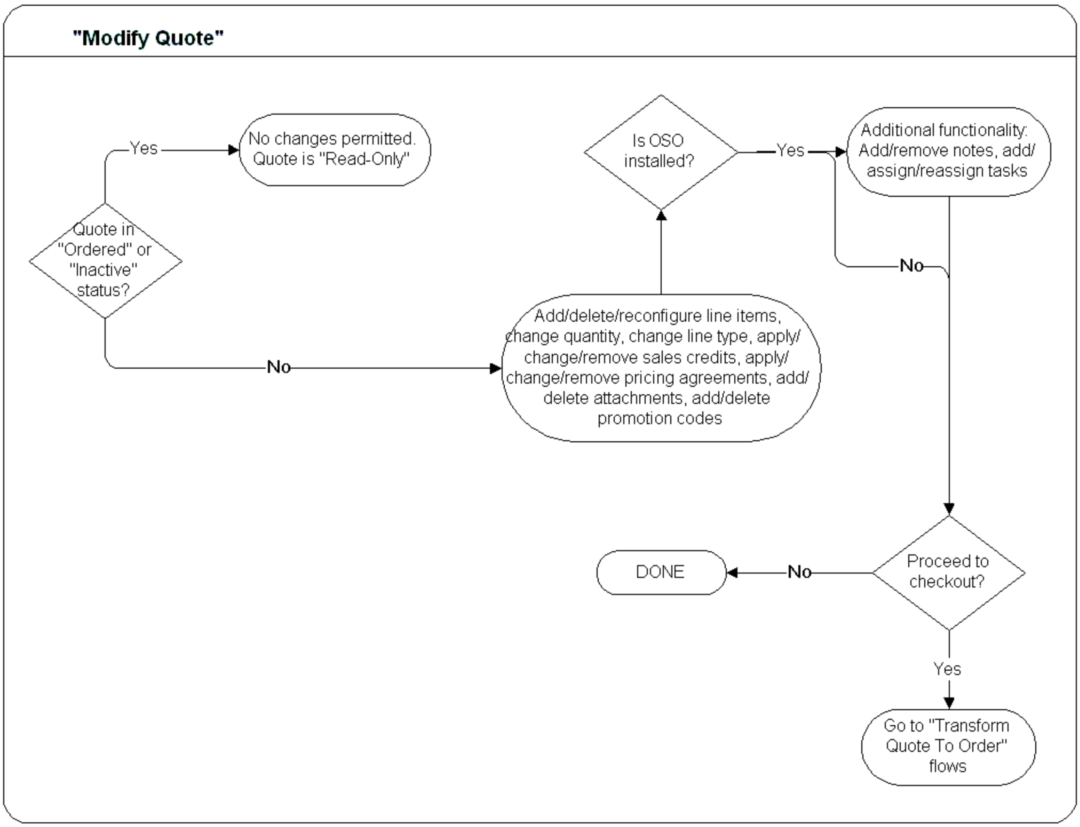
If the sold-to customer exists, you select the sold-to customer, and usually an address too.

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

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

1.4.3 Process Flow for Modifying a Quote

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



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

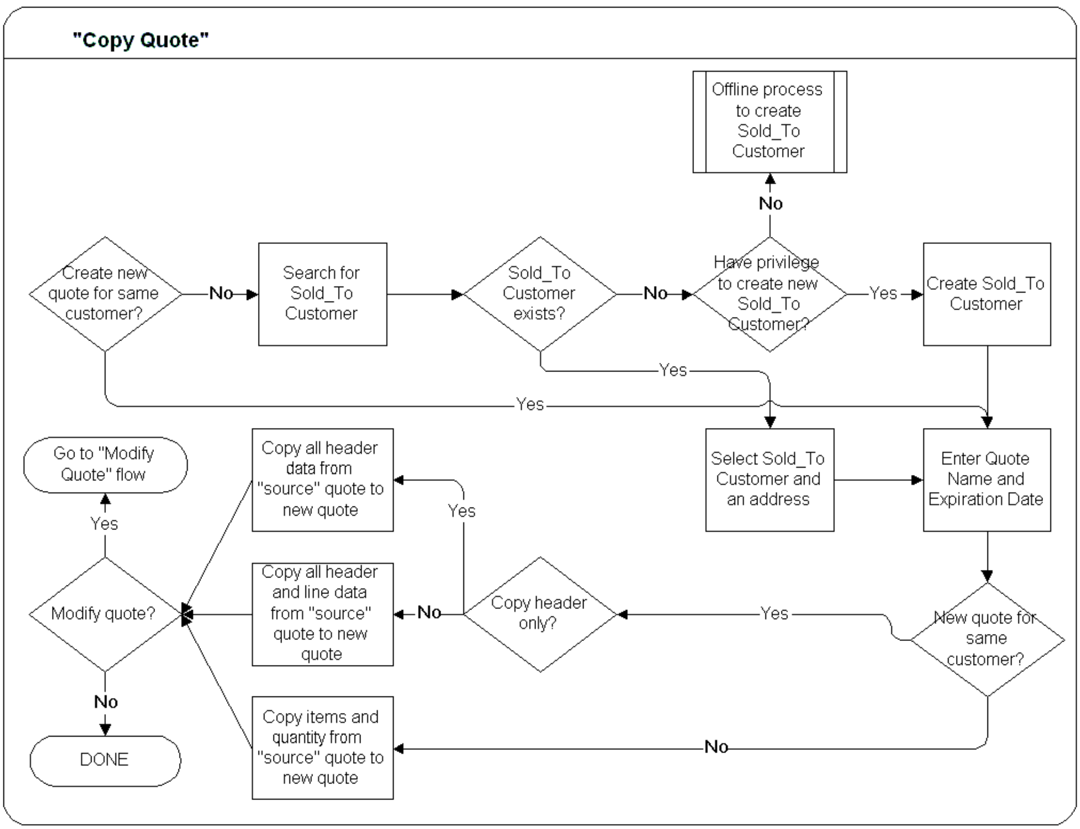
Possible updates to a quote version include changes in line items, quantities, line types, sales credits, pricing agreements, attachments, and promotion codes.

If OSO is installed, you can also add or remove notes, and add, assign, or reassign tasks.

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

1.4.4 Process Flow for Copying a Quote

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



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

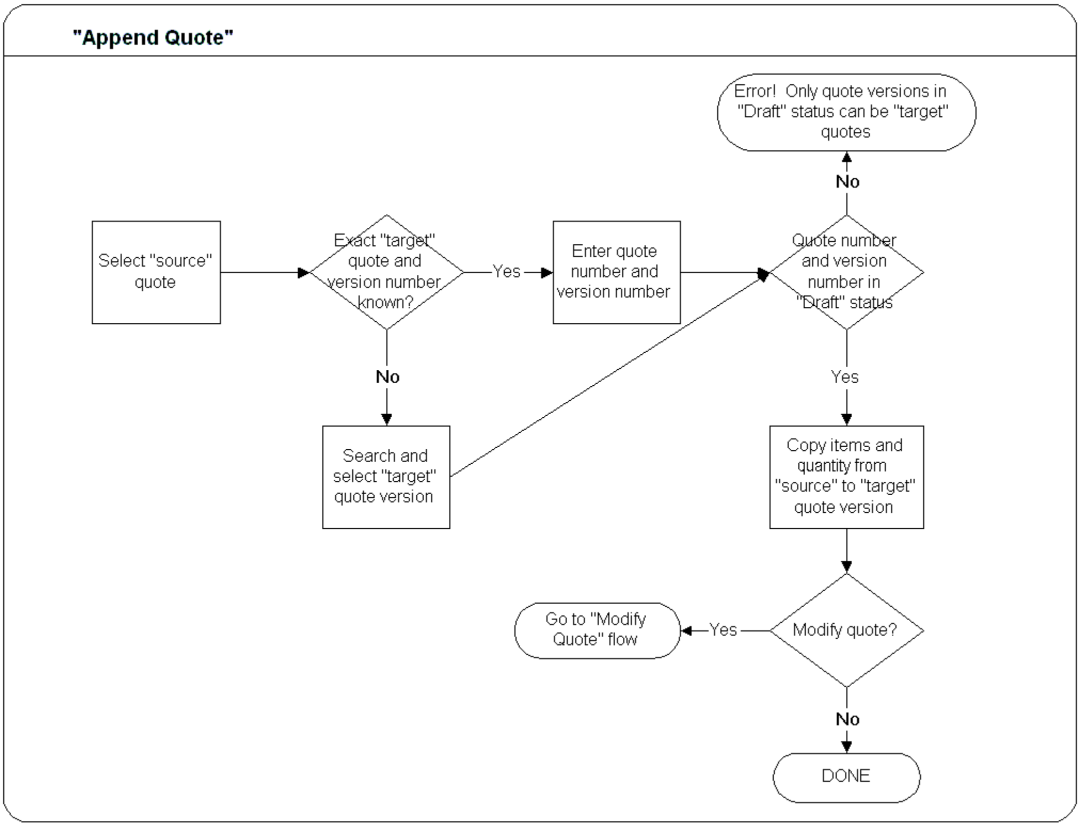
If the new quote is for a different customer, you then search for a sold-to customer. If the sold-to customer does not exist, you can create the sold-to customer if you have the requisite permission. If you do not have this permission, there must be an offline process to create the sold-to customer.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

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

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

1.4.5 Process Flow for Appending a Quote

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



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

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

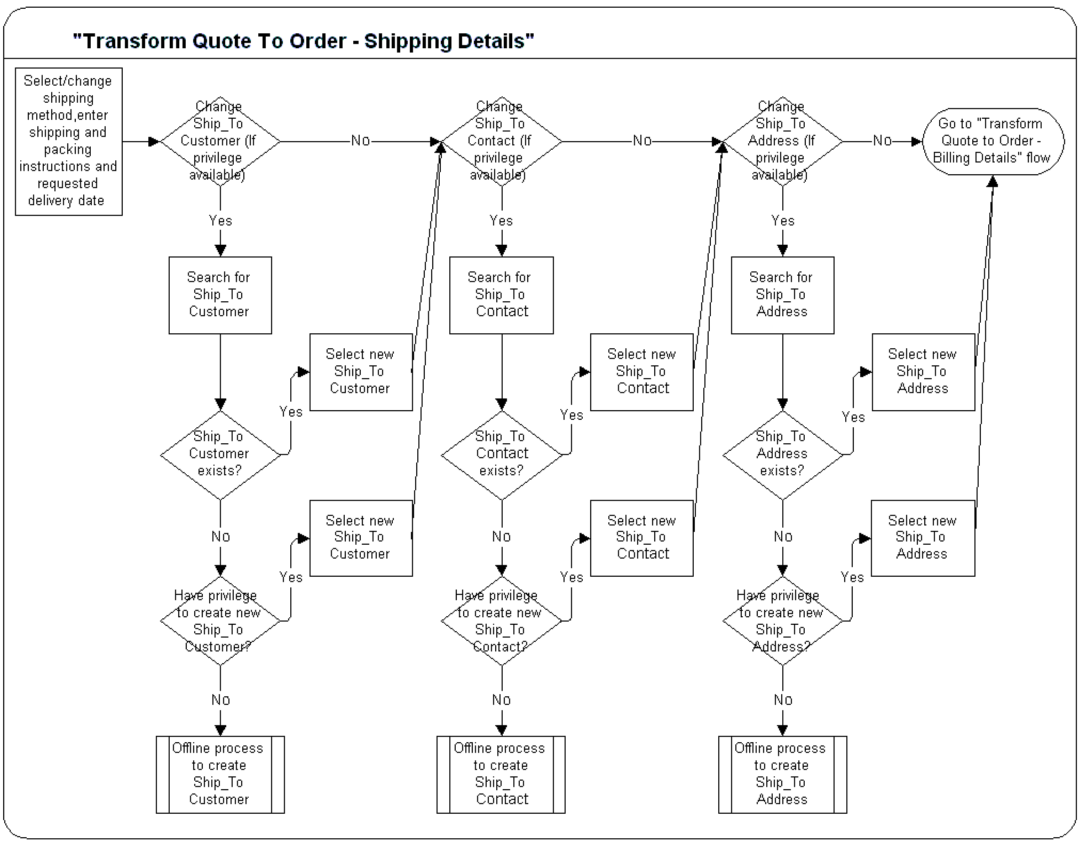
Oracle HTML Quoting checks if the target quote is in the Drafted status. If the target quote is not in Drafted status, then you cannot append another quote to it.

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

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

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

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



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

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

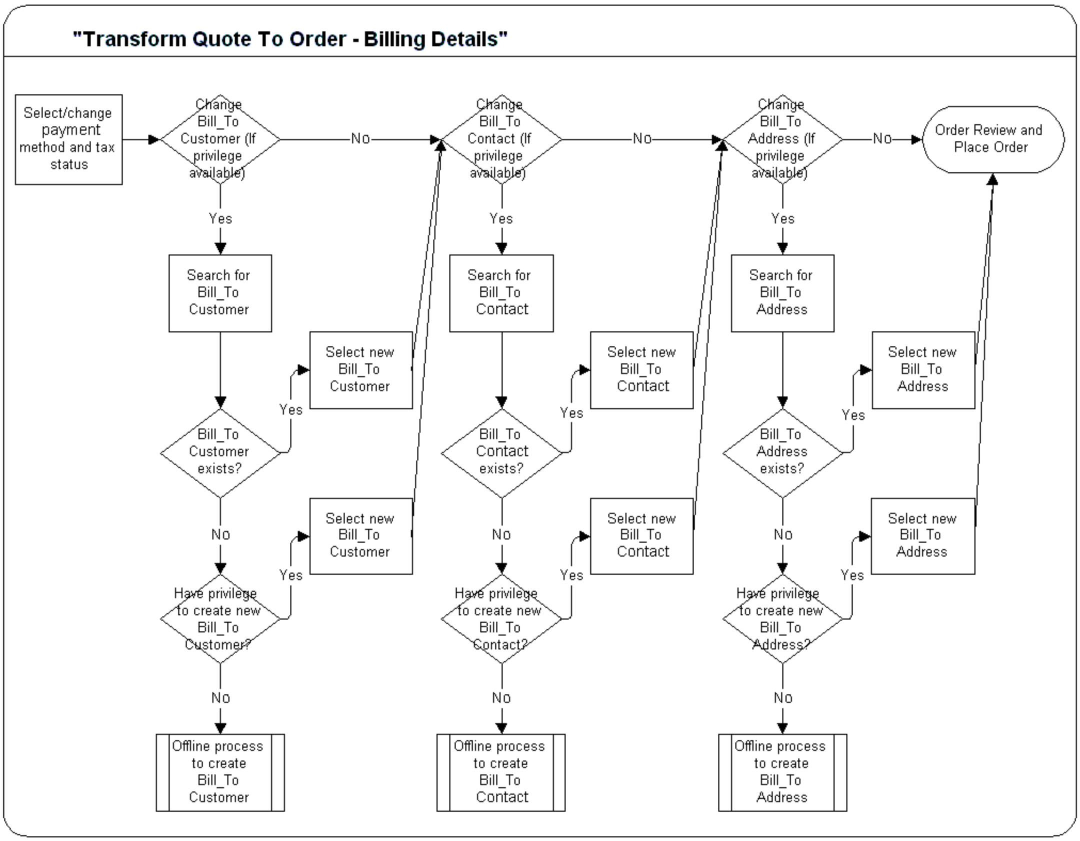
After selecting or creating a ship-to customer, you choose the ship-to contact. By default, Oracle HTML Quoting selects the sold-to contact as the ship-to contact. You can change the ship-to contact if you have the requisite permission. You first search for the ship-to contact and select the new ship-to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

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

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

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

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



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

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

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

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

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

2

Using Oracle HTML Quoting

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

2.1 Overview of Using Oracle HTML Quoting

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

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

- Override prices manually
- Use attachments
- Use pricing agreements
- Assign sales credits
- Submit a quote as an order
- Search on and retrieve existing customers without a financial account
- Create a new customer in the context of assigning a sold-to customer during quote creation
- Change the ship-to customer from the default ship-to customer
- Create a new customer with a shipping relationship to the sold-to customer
- Change the ship-to contact from the default (if any) ship-to contact
- Create a new contact for the ship-to customer who will have a ship-to relationship with the ship-to customer
- Create a new address associated with the ship-to contact which will have a ship-to relationship with the ship-to contact
- Create a new address associated with the ship-to customer which will have a ship-to relationship with the ship-to customer
- Search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer
- Change the bill-to customer from the default bill-to customer
- Create a new customer with a billing relationship to the sold-to customer
- Change the bill-to contact from the default (if any) bill-to contact
- Create a new contact for the bill-to customer who will have a bill-to relationship with the bill-to customer

- Create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact
- Create a new address associated with the bill-to customer which will have a bill-to relationship with the bill-to customer
- Search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer

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

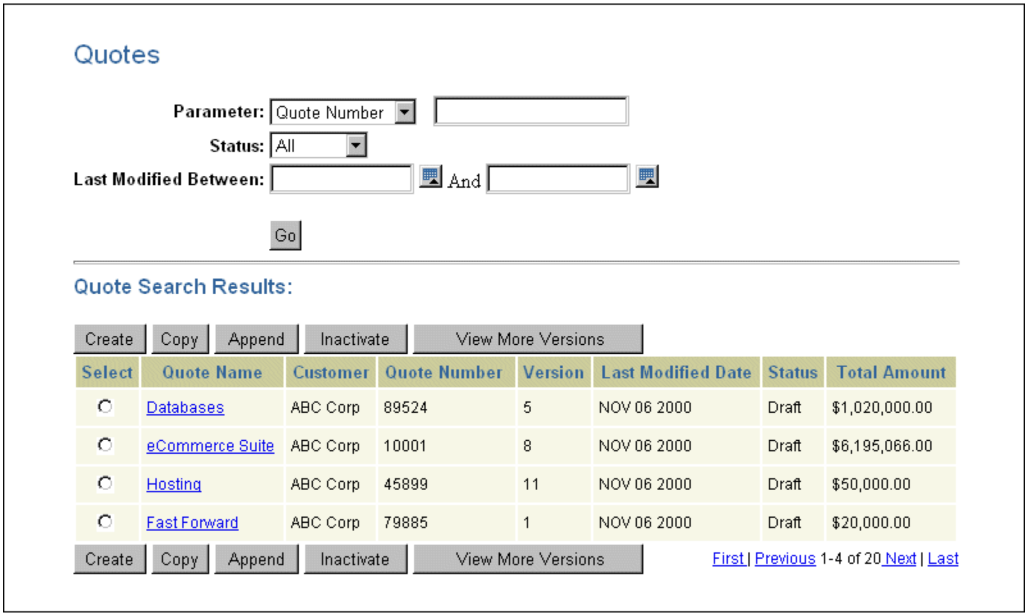
2.2 The Quote Listing Page

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

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

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

Figure 2–1 The Quote Listing Page



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

Use the following procedure to access your Quote Listing page.

Steps

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

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

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

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

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

2.3 Viewing Quotes

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

Steps

1. Navigate to your Quote Listing page.

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

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

   - Click **Create** to begin the process of creating a new quote.
   - Search for specific quotes.
   - Click on a quote name link to view the quote details. You can modify them if necessary.
   - In the Select column, highlight the radio button next to a quote and click **Copy** to copy the quote.
   - In the Select column, highlight the radio button next to a quote and click **Append** to begin the process of appending its line items to an existing quote.
   - In the Select column, highlight the radio button next to a quote and click **Inactivate** to inactivate it.
   - In the Select column, highlight the radio button next to a quote and click **View More Versions** to view other versions of the selected quote that match the default Quote Listing criteria or search criteria.

2.3.1 Searching for Quotes

In the Quote Listing page, you can search for quotes assigned to you using the following criteria: quote number, quote name, customer, status, range of dates of last modification.

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

Steps

1. Navigate to your Quote Listing page.

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

2. In the View Existing Quotes section, enter your search criteria as follows:

   a. If you want to search by parameter, do one of the following:

      * Select **Quote Name** from the pull-down menu and enter either an exact quote name or part of a quote name followed by % to conduct a wildcard search.

      * Select **Quote Number** from the pull-down menu and enter either an exact quote number, or part of a quote number followed by %.

      * Select **Customer** from the pull-down menu and enter either an exact customer name, or part of a customer name followed by %.

   b. If you want to search by a certain status, choose the status of the quote(s) for which you are searching using the pull-down menu and leave the Parameter field blank.

   c. If you want to view all quotes, select All in the Status field.

   d. Optionally, for Last Modified Between, click on the calendar buttons to choose a start date in the left field and an end date in the right field.

3. Click **Go.**

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

2.3.2 Searching for More Versions of Quotes

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

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

Steps

1. In the Quote Listing page, highlight the radio button next to the quote for which you want to see other versions.
2. Click **View More Versions.**

   The Quotes page opens with a list of all applicable versions of the quote that belong to you and match the default Quote Listing criteria or the previously entered search criteria.
3. You can now do any of the following with this quote version listing:
   a. Click on the version number link of a quote to view the quote version. When you view the quote version, you can modify it if necessary.
   b. Versions with status ordered are listed with the order numbers. Click on the order number link to view the order in Order Tracker.
   c. In the Select column, highlight the radio button next to a quote version and click **Copy** to copy the quote.
   d. In the Select column, highlight the radio button next to a quote version and click **Append** to append its line items to an existing quote.
   e. Click **Inactivate All** to inactivate all versions of the quote except those with ordered status.

2.4 Viewing Quote Details

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

Steps

1. Navigate to your Quote Listing page.

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

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

   The Quote Details - Items page opens.

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

   The Quote Detail - Main page opens. This page displays the following information for the quote: customer, account, contact, quote name, quote number, expiration date, agreement, status, sales representative to whom the quote is assigned, creation date, and last modified date. This page also shows the order number for quotes in ordered status.

   If OSO is installed, this page also displays the opportunity and channel.

   This information updates automatically as you modify the quote.

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

   a. Click **Copy** to copy the quote into a new quote.

   b. Click **Append** to append the quote's line items to an existing quote.

   c. Click **Create New Version** to create a new version of the quote.

   d. Click **Print Quote** to view a printer-friendly summary of the quote.

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

   a. Click **Items** to add or remove items in the quote.

   b. Click **Pricing Agreements** to choose the pricing agreement that dictates the pricing of the quote.

   c. Click **Promotion Codes** to choose promotion codes for the quote.

   d. Click **Attachments** to attach files to the quote.

   e. Click **Notes** to create notes about the quote. (This sub-tab is available if you have entered Oracle HTML Quoting from OSO, and if your system administrator has enabled this functionality.)

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

g. Click **Versions** to view more versions of the quote.

2.5 Creating Quotes

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

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

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

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

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

2.5.1 Creating New Quotes

Use this procedure to create a new quote.

Steps

1. In the Quote Listing page, click **Create.**

   The Create Quote page opens.

2. In the Create Quote page, you must specify your sold-to customer. Enter the following search parameters for the customer:

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

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

b. Optionally, enter your sold-to customer's account number in the Customer Account Number field, using % as a wildcard character if necessary.

c. Optionally, choose your sold-to customer's country in the Country pull-down menu.

Note: If you need to create a new sold-to customer, click **Create Customer** instead to begin the process outlined in Section 2.15, "Creating Customers" of this manual. If you do not have the permission to create a new sold-to customer, this button does not appear on the page.

---

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

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

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

   The next Create Quote page opens.

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

---

5. In the Quote Name field, enter a name for the quote.

6. In the Expiration Date field, enter an expiration date, or keep the date that has been defaulted into the field. Your system administrator determines how the default date is calculated.

7. Click **Continue.** Oracle HTML Quoting creates the quote record.

   The Quote Detail - Items page opens.

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

2.5.2 Adding Items to Quotes

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

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

Basic Product Search

Use the following procedure to employ the basic product search.

Steps

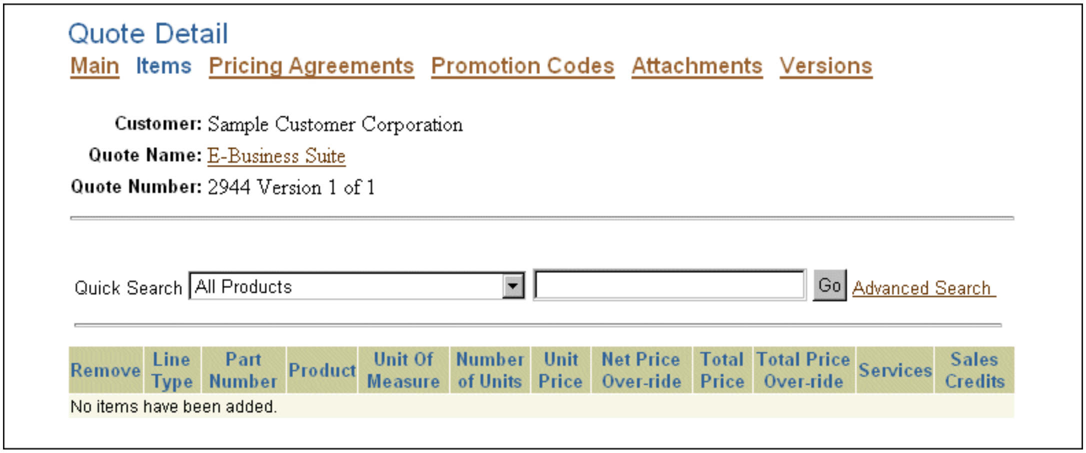
1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.

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

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

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

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



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

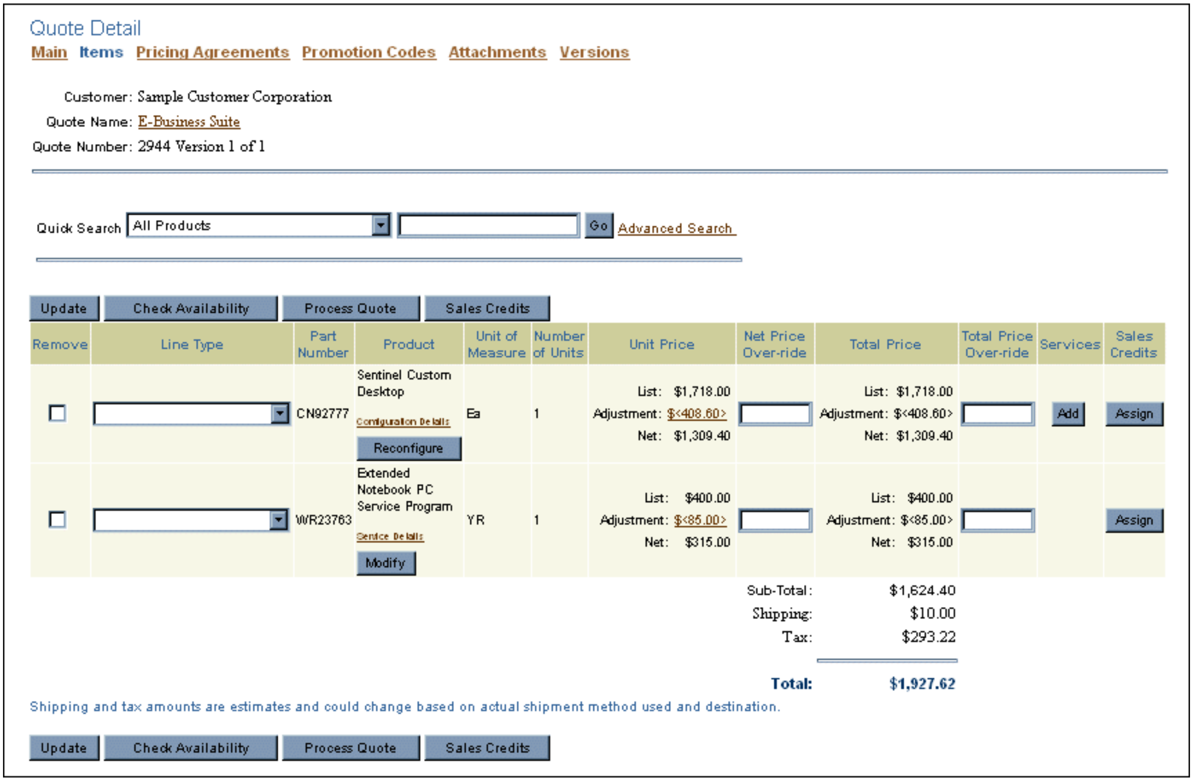
   The Add Item page lists the products that match your search criteria, including their part number, product, and unit of measure.
5. In the Add Item page, check the Select box next to the products that you want to add to the quote, then click the **Add** button that is immediately above or below the product search results.

   The Quote Detail - Items page opens, showing the products you have added as line items.

   If the product you selected is a configurable item, a Configure button will appear below the product name.

   If the product you selected has associated service items, an Add button will appear in the Services column.

Figure 2–3 The Quote Line Item Listing



6. Optionally, select the Remove checkbox on the line, and click **Update** to remove a line item.

7. Optionally, change the quantity of an item by altering the number in the Number of Units field, and clicking **Update.**

8. Optionally, check availability of the products by clicking **Check Availability.**

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

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

Advanced Product Search

Use the following procedure to employ the advanced product search.

Steps

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

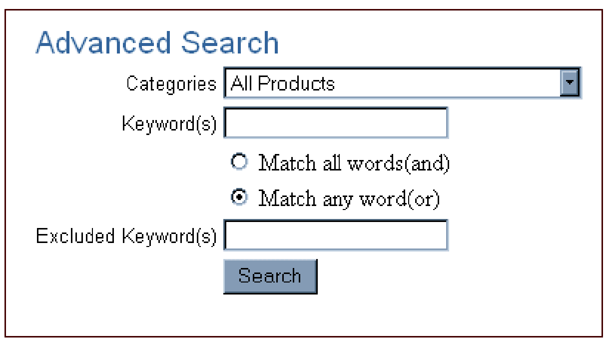
   - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
   - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

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

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

   The Advanced Search page opens.

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



3. In the Categories pull-down menu, choose the product inventory category that contains the product you are searching for. You can also choose **All Products** to search across categories.

4. In the Keyword(s) field, enter keywords by which you want to search for a product.

5. Highlight either the "Match all words (and)" radio button or the "Match any word (or)" radio button, to indicate whether the search results should return products that have all of your specified keywords or any one keyword.

6. In the Excluded Keyword(s) field, enter keywords that should not be associated with the products returned in the search results. (This is the equivalent of the boolean operator NOT.)
7. Click **Search.**

   The Add Item page lists the products that match your search criteria, including their part number, product, and unit of measure.
8. In the Add Item page, check the Select box next to the products that you want to add to the quote, then click the **Add** button that is immediately above or below the product search results.

   The Quote Detail - Items page opens, showing the products you have added as line items.

   If the product you selected is a configurable item, a Configure button will appear below the product name.

   If the product you selected has associated service items, an Add button will appear in the Services column.
9. Optionally, remove a line item by selecting the Remove checkbox on the line, and clicking **Update.**
10. Optionally, change the quantity of an item by altering the number in the Number of Units field, and clicking **Update.**
11. Optionally, check availability of the products by clicking **Check Availability.**

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

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

2.5.3 Adding Service Items to Quotes

Service items are available to customers ordering serviceable items in HTML Quoting. There are two types of service items:

- Warranties — Services automatically included with the purchase of a product.

  Warranties are defined as a component in the bill of materials for a serviceable product. They are included in the list price of the serviceable product and cannot be sold a a separate line item. Each serviceable product can ship with one or more base warranties.

- Extended Warranties — Services that may be purchased in addition to a product.

> **Note:** Service items must always apply to a Serviceable product and cannot be sold without referencing a Serviceable product on a quote.

Use the following procedure to add a service item to a quote.

Steps

1. Add a serviceable item to the quote.

   Once you add a serviceable item to the quote, an Add button appears in the Services column.

2. Click **Add**.

   The Add Service page opens, listing all available services for the serviceable product.

3. Select one or more service by placing a check in the Select box for the item.
4. Use the Line Type LOV to select a line type for the item.
5. Use the Calendar button to select a start date for the service item.
6. Enter the duration of the service item in the Duration field.
7. Use the Period LOV to select an period for the service item.
8. Click **Add** to apply the changes to your quote.

   Clicking Add returns you to the Quote Detail - Items page, where your service items display as line items.

2.5.3.1 Adding a Service for a Configurable Item

Use the following procedure to add a service to a configurable item.

> **Note:** You cannot add a service item to a configurable item unless the model item or at least one of the components is serviceable.

Steps

1. Add a configurable item to your quote.

   A Configure button appears in the Product column below the product name.

2. Configure the item.

   If, once you configure the item, the model item or at least one of the components is serviceable, then an Add button appears in the Services column.

3. Click **Add**.

   The Add Service for Configuration page opens. This page lists the configured item and all its components. There is an Add button next each component that is serviceable.

4. If you want to add a service for a certain component, click **Add**.

   The Add Service window opens, displaying the available services for the component.

5. Select one or more service by placing a check in the Select box for the service.
6. Use the Line Type LOV to select a line type for the item.
7. Use the Calendar button to select a start date for the service item.
8. Enter the duration of the service item in the Duration field.
9. Use the Period LOV to select an period for the service item.
10. Click **Add** to apply the changes.

    You return to the Add Service for Configuration page.

11. Repeat the procedure for each component to which you want to add service items.

    When you are finished adding service items for the configured items, click **Done** to return to the Quote Detail - Items page.

2.5.4 Modifying a Service Item

Use the following procedure to modify service items after they are added to the quote.

Steps

1. Click **Modify** in the Product column of the service item.

The Modify Service page opens.

2. Revise the service item information according to your needs.
   a. To change the line type, use the Line Type LOV to do so.
   b. To change the start date, use the Calendar button to do so.
   c. To change the duration, enter a new one into the Duration field.
   d. To change the period, use the Period LOV to do so.
3. Click **Update** to apply your change and return to the Quote Detail - Items page.
4. Click **Restore** to restore the original values entered for each field.

2.6 Adding Trade-In Items to Quotes

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

When trade-ins are allowed, the Line Type column's fields in the Quote Detail - Items page appear as pull-down menus, as shown in Figure 2–3, "The Quote Line Item Listing". You can select a Line Type of Line Category "Return" from pull-down menus to mark an item as a trade-in.

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

Steps

1. Using the procedures outlined in Section 2.5.2, "Adding Items to Quotes", search for the item that your customer is trading in, and add it to the quote.
2. In the Quote Detail - Items page, on the line for the trade-in item, choose **Return** from the pull-down menu in the Line Type column.
3. Click **Update.**

When the application calculates the order total, it recognizes items with the line type **Return** as trade-in items. The application treats the trade-in items' prices as credits and subtracts them from the order total.

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

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

You can override trade-in item prices manually, as detailed in Section 2.7.1, "Overriding Item Prices".

2.7 Viewing Item Details in Quotes

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

Configuration Details

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

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

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

Service Details

Service items that are associated with a serviceable item, are listed as separate line items in the quote. Each service item has a Service Details link, which displays information about the serviceable item, its included warranties, and the details of the selected service.

You can modify a service by clicking **Modify**.

Adjustment Detail

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

2.7.1 Overriding Item Prices

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

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

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

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

Steps

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

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

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

2.7.2 Allocating Sales Credits

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

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
   - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
   - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.
2. Click **Sales Credits** to assign sales credits at the header level for the quote, or click **Assign** in the Sales Credits column to assign sales credits for a line item.

   The Sales Credits page opens.

   > **Note:** If you do not specify a line level sales credit for an item in your quote, the existing header level sales credit is assigned to the line by default. If you assign a sales credit to a line item and exit without clicking Update, the header level sales credit is defaulted into the line as well. However, once you assign a line level sales credit and click Update, the header level sales credit information no longer applies.

3. To allocate revenue sales credits, scroll down to the Revenue Classification section and follow these steps:
   a. Search for sales representatives to whom you can allocate sales credits by choosing a sales representative category from the Search pull-down menu, entering the sales representative’s name or wildcard in the adjacent text field, and clicking **Go.**

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

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

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

c. For each sales representative, choose a revenue credit type from the pull-down menu in the Credit Type column.

d. Indicate the percentage of sales credits each sales representative should receive if this quote is placed as an order, in the text field in the Credit Percent column.

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

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e. Click **Update** to save your changes.

f. Optionally, click **Restore** to revert to your last-saved changes.

g. Optionally, remove a sales representative from the Revenue Classification section by checking the Remove checkbox on the sales representative's line and clicking **Update.**

h. Click **Done** to return to the Quote Detail - Items page.

4. To allocate non-revenue sales credits, scroll down to the Non-Revenue Classification section and follow these steps:

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

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

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

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

   c. For each sales representative, choose a non-revenue credit type from the pull-down menu in the Credit Type column.

   d. For each sales representative, indicate the percentage of sales credits they should receive if this quote is placed as an order, in the text field in the Credit Percent column.

e. Click **Update** to save your changes.

f. Optionally, click **Restore** to revert to your last-saved changes.

g. Optionally, remove a sales representative from the Revenue Classification section, check the Remove checkbox on the sales representative's line and click **Update.**

h. Click **Done** to return to the Quote Detail - Items page.

2.7.3 Applying Pricing Agreements

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

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

Steps

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

   The Quote Detail - Pricing Agreements page opens. The page shows the pricing agreement and price list that is currently associated with the quote, and a list of pricing agreements that are eligible to be associated with the quote, with their price lists.
3. To remove the pricing agreement that is currently associated with the quote, click **Remove Pricing Agreement.**
4. To associate a pricing agreement with the quote, highlight the Select radio button next to the pricing agreement that you want to use and click **Apply.**

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

2.7.4 Applying Promotion Codes

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

Steps

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

   The Quote Detail - Promotion Codes page opens.
3. In the Promotion Code column, enter each promotion code that you want to apply to the quote in a separate text field.

   Note: You cannot add duplicate promotion codes.

   ---
4. Optionally, if you want to apply more promotion codes than there are text fields, click **Add More Rows.**

   The application adds three rows at a time.
5. Optionally, remove a promotion code by selecting the Remove checkbox next to it and clicking **Done.**
6. Click **Done** when you have finished entering promotion codes.

   The promotion codes are applied to the quote.

2.7.5 Including Attachments in Quotes

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

Steps

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

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

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

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

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

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

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

8. Optionally, remove an attachment by checking the Remove checkbox on its line in the attachment listing and clicking **Update.**

2.8 Copying Quotes

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

The following three copy options are available:

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

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

Table 2–1 Information Copied by the Copy Quote Function

	Same Customer, Header and Lines	Same Customer, Header Only	Different Customer, Lines Only
Sales channel	Yes	Yes	No
Sold-to customer and contact	Yes	Yes	No
Ship-to customer, contact, and address at the header level	Yes	Yes	No
Ship-to customer, contact, and address at the line level	Yes	No	No
Shipping method, shipping instructions, packing instructions, requested delivery date at the header level	Yes	Yes	No

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

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

2.8.1 Copying an Entire Quote

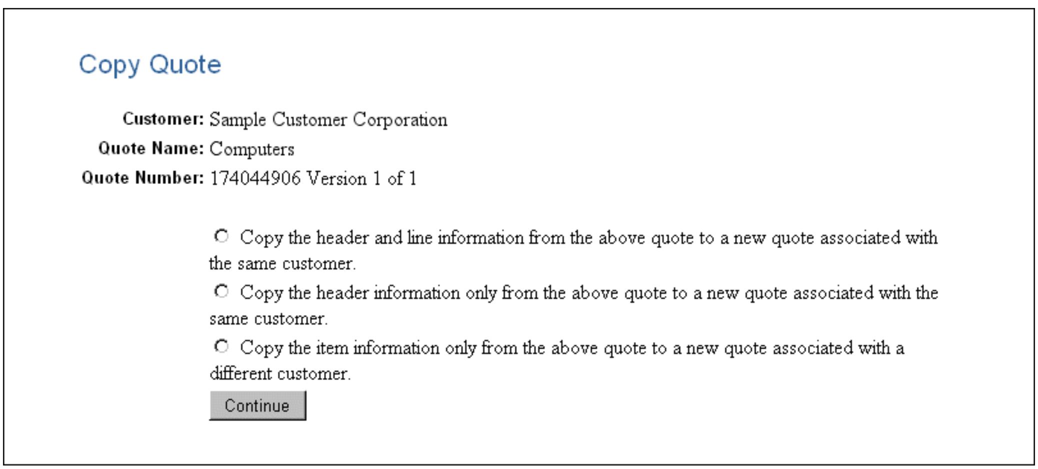
Use this procedure to copy an entire quote to a new quote for the same customer.

Steps

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

   The Copy Quote page opens.

Figure 2–5 The Copy Quote Page for Quoting



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

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

4. In the Copy To: section of this Copy Quote page, enter the quote name and click **Create.** (If you make a mistake, click **Clear** instead to clear the field on the page.)

   The new quote is created, and the Quote Detail - Items page for the new quote opens.

   You can now modify this quote if necessary.

2.8.2 Copying Header Information to a New Quote

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

Steps

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

   The Copy Quote page opens.

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

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

4. In the Copy To: section of this Copy Quote page, enter the quote name and click **Create.** (If you make a mistake, click **Clear** instead to clear the field on the page.)

   The new quote is created, and the Quote Detail - Items page for the new quote opens.

5. You can now modify this quote if necessary.

2.8.3 Copying Line Information to a New Quote

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

Steps

1. Navigate to the Copy Quote page in one of the following three ways:

   - In the Quote Listing page, highlight the Select radio button next to the quote that you want to copy, and click **Copy.**
   - In the Quote Detail - Main page of the quote that you want to copy, click **Copy.**
   - In the Quote Detail - Versions page of the quote that you want to copy, highlight the Select radio button next to the quote version that you want to copy, and click **Copy.**

   The Copy Quote page opens.

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

3. Click **Continue.**

   The Create Quote page opens.

4. In the Create Quote page, you must specify your sold-to customer. Enter the following search parameters for the customer:

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

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

   b. Optionally, in the Customer Account Number field, enter your sold-to customer’s account number, using % as a wildcard character if necessary.

   c. Optionally, in the Country pull-down menu, choose your sold-to customer’s country.

      If you do not specify a value in the country field, the search will return all addresses for customers that match your other criteria, including the addresses that have no value for their countries.

Note: If you need to create a new sold-to customer, click **Create Customer** instead to begin the process outlined in Section 2.15, "Creating Customers" of this manual. If you do not have the permission to create a new sold-to customer, this button does not appear on the page.

---

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

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

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

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

7. In the Copy To: section of this Copy Quote page, enter the quote name and click **Create.** (If you make a mistake, click **Clear** instead to clear the field on the page.)

   The new quote is created, and the Quote Detail - Items page for the new quote opens.

8. You can now modify this quote if necessary.

2.9 Appending Quotes

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

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

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

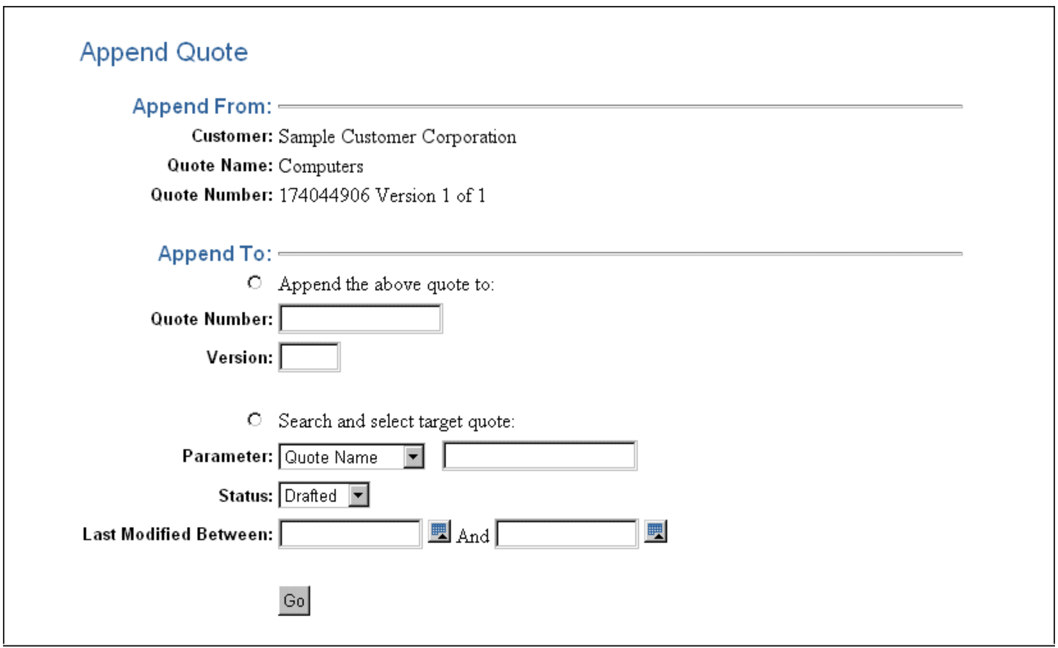
Steps

1. Navigate to the Append Quote page in one of the following three ways:

   - In the Quote Listing page, highlight the Select radio button next to the quote that you want to append, and click **Append.**
   - In the Quote Detail - Main page of the quote that you want to append, click **Append.**
   - In the Quote Detail - Versions page of the quote that you want to copy, highlight the Select radio button next to the quote version that you want to append, and click **Append.**

   The Append Quote page opens.

Figure 2–6 The Append Quote Page for Quoting



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

3. If you do not know the exact quote version to which you want to append the quote, search for it as follows:

   a. Highlight the radio button next to "Search and select target quote:".

   b. For Parameter, do one of the following:

      * Select **Quote Name** from the pull-down menu and enter a quote name or wildcard.

      * Select **Quote Number** from the pull-down menu and enter a quote number or wildcard.

      * Select **Customer** from the pull-down menu and enter a customer name or wildcard.

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

   c. The Status pull-down menu only allows you to search for quotes in drafted status.

   d. Optionally, for Last Modified Between, click on the calendar buttons to choose a start date in the left field and an end date in the right field.

4. Click **Go.**

5. If you specified the target quote by quote number and version, the Quote Detail - Items page for the target quote opens, showing the new lines that you have appended from the source quote.

6. If you searched for the target quote, the Append Quote page refreshes with a Quote Search Results section that lists the latest versions of quotes that match your search criteria.

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

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

2.10 Creating and Viewing Quote Versions

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

2.10.1 Creating New Quote Versions

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

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

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

Steps

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

   The Quote Detail - Items page opens.

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

   The Quote Detail - Versions page opens.

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

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

3. In the Quote Detail - Items page, click **Main.**

   The Quote Detail - Main page opens.

4. In the Quote Detail - Main page, click **Create New Version.**

   The Create New Version page opens. This page verifies that the new quote version has been created and lists the quote number, version number, and status for the new version.

5. After reviewing the Create New Version page, click **Continue.**

   The Quote Detail - Main page for the new quote version opens.

   The new quote version is ready to be modified.

2.10.2 Viewing Quote Versions

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

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

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote by clicking on its quote name link.

   The Quote Detail - Items page opens.

2. Click on the Versions sub-tab.

3. The Quote Detail - Versions page opens. This page lists all other versions of the current quote that you own. It includes each quote version's version number, last modified date, creation date, status, total amount, and order number if it has been placed as an order.

4. From the Quote Detail - Versions page, you can do any of the following:

   a. Click on the version number link of a quote to view the quote version's Quote Detail - Items page. From the Quote Detail - Items page, you can decide to modify the quote version if necessary.

   b. Versions with status ordered are listed with the order numbers. Click on the order number link to view the details of the order.

c. In the Select column, highlight the radio button next to a quote version and click **Copy** to begin the process of copying it.

d. In the Select column, highlight the radio button next to a quote version and click **Append** to begin the process of appending its line items to an existing quote.

e. Click **Inactivate All** to inactivate all versions of the quote except those of status ordered.

2.11 Inactivating Quotes

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

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

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

Steps

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

   All versions of the quote are inactivated.

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

Steps

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

   The Quote Detail - Items page opens.
2. Click **Versions.**

   The Quote Detail - Versions page opens.
3. Click **Inactivate All** to inactivate all versions of the quote.

   The quote versions are inactivated.

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

Steps

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

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

   The quote versions are inactivated.

2.12 Printing Quotes

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

Steps

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

   The Quote Detail - Items page opens.
2. Click **Main.**

   The Quote Detail - Main page opens.
3. Click **Print Quote.**

   A printable layout of the quote opens on the page. It shows the sold-to, ship-to, and bill-to customer information, the line items' part numbers, descriptions, UOMs, quantities, unit prices, price adjustments, and total prices, estimated or final shipping and handling costs, and tax. It also displays a signature block.
4. If you need a paper copy of the quote, choose your browser's Print option to print this page.

2.13 Converting Quotes into Orders

You can convert quotes into orders if you have the required permissions. Converting quotes to orders involves entering shipping and billing customers, contacts, and addresses.

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

2.13.1 Shipping Details

Entering shipping details is the first step of transforming a quote into an order.

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

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

Steps

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

   The Shipping Information page opens.

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

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

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

   a. Click **Change.**

      The Ship to Customer page opens.

   b. Enter the following search parameters for the customer:

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

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

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

      Note: If you need to create a new ship-to customer, click **Create Customer** instead to begin the process outlined in Section 2.15, "Creating Customers" of this manual. If you do not have the permission to create a new ship-to customer, this button does not appear on the page.

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

      The Ship to Customer page opens. The Customer Search Results region displays all existing customers that match your search criteria. For each customer, it displays the customer name, account number, address, address type, and whether the address is the primary one for the customer. If the customer is an organization, the address listed is an organization address, not a contact's address.

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

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

   e. Optionally, if you want to change the ship-to customer back to the sold-to customer, click **Default** in the Ship to Customer region.

5. In the Ship to Contact region, choose a ship-to contact by following these steps:

   a. Click **Change.**

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

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

      Note: If you need to create a new ship-to contact, click **Create Contact** instead to begin the process outlined in Section 2.14.2, "Creating Contacts" of this manual. If you do not have the permission to create a new ship-to contact, this button does not appear on the page.

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

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

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

   d. Optionally, remove this ship-to contact by clicking **Remove** in the Ship to Contact region.

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

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

   a. Click **Change.**

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

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

Note: If you need to create a new ship-to address, click **Create Address** instead to begin the process outlined in Section 2.14.3, "Creating Addresses" of this manual. If you do not have the permission to create a new ship-to address, this button does not appear on the page.

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

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

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

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

7. In the Shipping Instructions region, enter a date in the Requested Delivery Date field in DD-MON-YYYY format, clicking the calendar button to access the date picker if necessary.
8. In the Shipping Instructions field, enter any specific shipping instructions that you have.
9. In the Packing Instructions field, enter any specific packing information that you have.
10. In the Line Level Shipping region, highlight the Yes radio button to ship all items using the shipping information that you have entered on this page, or highlight the No radio button to enter different shipping information for individual line items, such as a different ship-to address.

11. Click **Continue.**

12. If you chose Yes in the Line Level Shipping region, the Payment and Billing Information page opens. See Section 2.14, "Billing Details" for instructions on filling out this page.

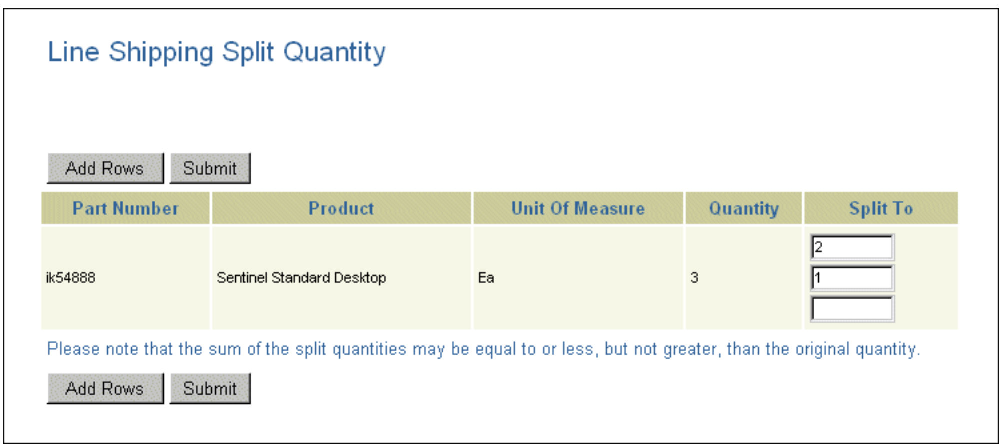
13. If you chose No in the Line Level Shipping region, the Line Shipping Information page opens, listing each line item in the quote.

14. Highlight the Select radio button next to a line item for which you want to enter shipping information that is different from the header-level shipping information.

15. Optionally, click **Split** if you want to specify different shipping information for different items on this line. For example, click **Split** if you want to ship the items on this line to more than one address.

    The Line Shipping Split Quantity page opens.

Figure 2–7 The Line Shipping Split Quantity Page



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

a. In the fields in the Split To column, enter the item quantities into which you want to split the line. Use a different field for each line into which you want to split the line item. For example, if a line has 6 units of Product A, and you want to ship 2 units each to Address X, Address Y, and Address Z, enter the number 2 in three different fields.

b. Optionally, click **Add Rows** to add more fields to the Split To column if necessary.

c. When finished, click **Submit.**

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

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

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

The Line Shipping Information page opens.

17. Optionally, click **Details** to view line-level shipping details for a line item.

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

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

The Payment and Billing Information page opens. See Section 2.14, "Billing Details" for instructions on filling out this page.

2.14 Billing Details

After entering the shipping details, the next step is entering the billing details.

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

Steps

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

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

2. Click **Process Quote.**

   The Shipping Information page opens.

3. Click **Continue.**

The Payment and Billing Information page opens.

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

4. In the Payment Information region, enter payment information as follows:
   - If the customer is paying by purchase order, highlight the "Purchase Order" radio button and enter the purchase order number in the field below. Follow any other purchase order-specific instructions pertinent to your organization.
   - If your organization will bill the customer by invoice, highlight the Invoice radio button.
   - If the customer is paying with a credit card which has already been entered in the quote billing details, highlight the Existing Credit Card radio button and choose the credit card from the pull-down menu below.
   - If the customer is paying with a credit card which has not been entered in the quote billing details, highlight the New Credit Card radio button. Choose the credit card type from the Type pull-down menu, enter the credit card number in the Number field, and use the Expiration Date pull-down menus to enter the expiration date.
   - If the customer is paying by credit card and faxing the credit card information, highlight the I will fax my Credit Card radio button. Follow any other instructions pertinent to your organization that are related to faxing credit card information.
   - If the customer is paying with cash, highlight the Cash radio button.
   - If the customer is paying with a check, highlight the Check radio button and enter the check number in the field below.
5. In the Bill to Customer region, the sold-to customer defaults as the bill-to customer.

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

   a. Click **Change.**

      The Bill to Customer page opens.

   b. Enter the following search parameters for the customer:

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

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

* Optionally, in the Customer Account Number field, enter your bill-to customer's account number, using % as a wildcard character if necessary.
* Optionally, in the Country pull-down menu, choose your bill-to customer's country.

Note: If you need to create a new bill-to customer, click **Create Customer** instead to begin the process outlined in Section 2.15, "Creating Customers" of this manual. If you do not have the permission to create a new bill-to customer, this button does not appear on the page.

---

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

   The Bill to Customer page opens. The Customer Search Results region displays all existing customers that match your search criteria. For each customer, it displays the customer name, account number, address, address type, and whether the address is the primary one for the customer. If the customer is an organization, the address listed is an organization address, not a contact's address.

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

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

e. Optionally, if you want to ship to the sold-to customer instead, click **Default** in the Ship to Customer region.

6. In the Bill to Contact region, choose a bill-to contact by following these steps:

   a. Click **Change.**

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

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

Note: If you need to create a new bill-to contact, click **Create Contact** instead to begin the process outlined in Section 2.14.2, "Creating Contacts" of this manual. If you do not have the permission to create a new bill-to contact, this button does not appear on the page.

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

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

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

d. Optionally, remove this bill-to contact by clicking **Remove** in the Ship to Contact region.

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

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

   a. Click **Change.**

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

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

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

Note: If you need to create a new bill-to address, click **Create Address** instead to begin the process outlined in Section 2.14.3, "Creating Addresses" of this manual. If you do not have the permission to create a new bill-to address, this button does not appear on the page.

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

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

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

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

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

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

9. Click **Continue.**

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

2.14.1 Placing Orders

You can convert quotes into orders if you have the required permission.

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

Steps

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

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

2. Click **Process Quote.**

   The Shipping Information page opens.

3. Click **Continue.**

   The Payment and Billing Information page opens.

4. Click **Continue.**

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

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

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

   d. View the price adjustment detail of an item: Click on the price adjustment link to view the details of the price adjustment in the Adjustment Detail pop-up window.

   e. View line-level shipping information: Click on a **Details** button in the Line Level Shipping column to view shipping information for a line item.

   f. Modify shipping information: Click on the **Click here to change Shipping Information** link to modify shipping information in the Shipping Information page.

   g. Modify payment and billing information: Click on the **Click here to change Billing Information** link to modify billing information in the Payment and Billing Information page.

6. When you have finished reviewing the quote, click **Process Quote** to place the quote as an order.

2.14.2 Creating Contacts

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

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

- Shipping details
- Billing details

You can create contacts only for customers of type organization.

Steps

1. In the Ship to Contact page or the Bill to Contact page, click **Create Contact.**

   The Create Contact page opens. The organization name opens in the Customer Name read-only field.

2. Enter the contact's information in the Create New Contact page as follows:

   a. In the First Name, MI, and Last Name fields, enter the contact's first name, middle initial, and last name, respectively.

   b. In the Email field, enter the contact's e-mail address. This is an optional step.

   c. In the Day Phone, Evening Phone, and Fax Number fields, enter the contact's daytime, evening, and fax phone numbers, respectively.

   d. In the Country pull-down menu, select the country of the contact's address.

   e. In the Address Name field, enter what address this is for the contact: Home, Office, or another name.

   f. In the Address fields, enter your contact's ship-to address if you initially clicked the **Create Contact** button in the Ship to Contact page.

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

      Note: Entering address information for a contact is optional. This information is not mandatory to create a contact.

g. In the City field, enter the city of the contact's address.

h. In the County field, enter the county of the contact's address.

i. In the State field, enter the state of the contact's address.

j. In the Zip field, enter the zip code of the contact's address.

Note: If you do not enter an address and the existing ship-to or bill-to address is related to the ship-to or bill-to customer, then that address is associated to your contact. However, if the existing bill-to or ship-to address is related to the bill-to or ship-to contact, then it is erased.

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3. Click **Create.** (You can click **Clear** instead to clear all of the fields in this form.)

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

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

2.14.3 Creating Addresses

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

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

- shipping details
- billing details

Steps

1. In the Ship to Address page or the Bill to Address page, click **Create Address.**

   The Create Address page opens.

2. Enter the address information in the Create Address page as follows:

  a. Highlight the radio button next to the Customer Name or Contact Name for which you are creating the address.
  b. In the Country pull-down menu, select the country.
  c. In the Address Name field, enter what address this is: Home, Office, or another name.
  d. In the Address fields, enter a ship-to address if you initially clicked the **Create Address** button in the Ship to Address page.

     Enter a bill-to address if you clicked the **Create Address** button in the Bill to Address page.
  e. In the City field, enter the city.
  f. In the County field, enter the county.
  g. In the State field, enter the state.
  h. In the Zip field, enter the zip code.

3. Click **Create.** (You can click **Clear** instead to clear all of the fields in this form.)

   If you initiated the process to create the address in the Ship to Address page, the Shipping Information page opens with the newly created address entered.

   If you initiated the process to create the address in the Bill to Address page, the Payment and Billing Information page opens with the newly created address entered.

2.15 Creating Customers

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

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

- Create the quote
- Copy the quote
- shipping details
- billing details

Steps

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

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

      Enter your customer's bill-to address if you clicked the **Create Customer** button in the Bill to Customer page.
   g. In the City field, enter the city of the customer's address.
   h. In the County field, enter the county of the customer's address.
   i. In the State field, enter the state of the customer's address.
   j. In the Zip field, enter the zip code of the customer's address.
4. Click **Create.** (You can click **Clear** instead to clear all of the fields in this form.)

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

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

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

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

A

Oracle HTML Quoting User Interface Reference

This appendix provides flows for the Oracle HTML Quoting user interface (UI) pages, and descriptions of the user interface pages and their buttons, links, forms, and fields.

A.1 Page Flows

This section addresses the Oracle HTML Quoting UI page flows through which you proceed when performing the following tasks:

- Using the Quote Listing page
- Creating quotes
- Copying quotes
- Appending quotes
- Submitting quotes as orders
- Changing shipping information
- Changing billing information

This section also addresses the Oracle HTML Quoting UI page flows through which you proceed when working in the following Quote Detail sub-tabs:

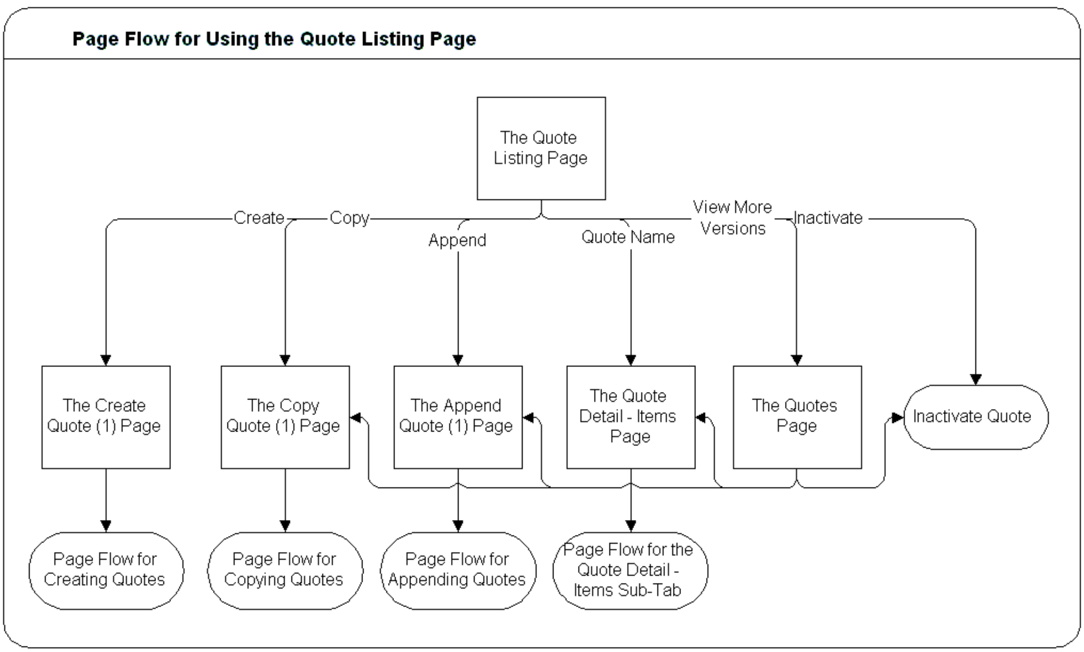
- Quote Detail - Main
- Quote Detail - Items
- Quote Detail - Pricing Agreements
- Quote Detail - Promotion Codes

- Quote Detail - Attachments
- Quote Detail - Versions

Note: The pages and UI objects that are displayed for you depend on the permissions that your Oracle HTML Quoting system administrator or sales manager has assigned to you, and your application context.

A.1.1 Page Flow for Using the Quote Listing Page

You follow the overall page flow illustrated in the following diagram when using the Quote Listing page.

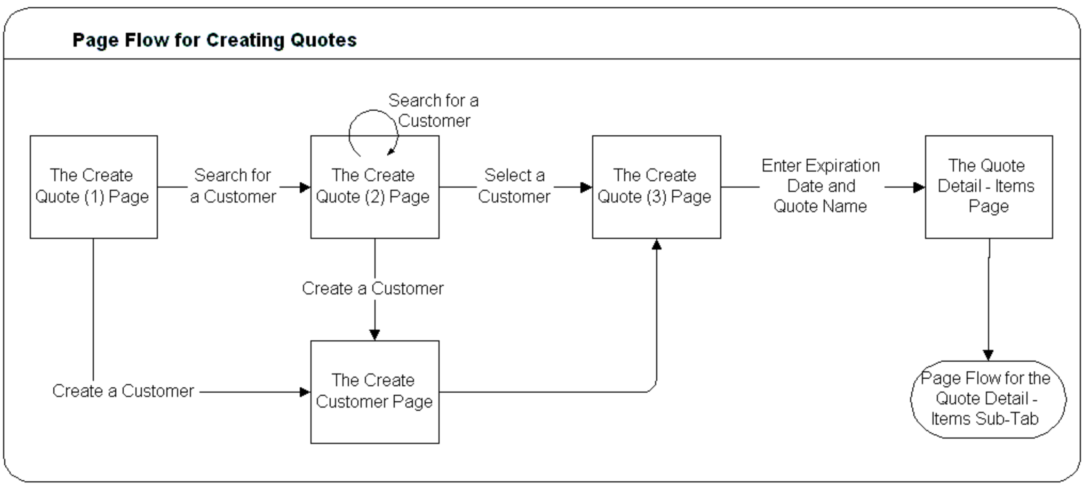


From the Quote Listing page, you can choose to create a quote and enter the page flow for creating quotes, copy a quote and enter the page flow for copying quotes, append a quote and enter the page flow for appending quotes, view a quote's details and enter the page flow for the Quote Detail - Items sub-tab, view more versions of a quote in the Quotes page, or inactivate a quote.

If you choose to view more versions of a quote in the Quotes page, you can choose to copy a quote version and enter the page flow for copying quotes, append a quote version and enter the page flow for appending quotes, view a quote version's details and enter the page flow for the Quote Detail - Items sub-tab, inactivate the quote, or view the order details of a quote version with an Ordered status.

A.1.2 Page Flow for Creating Quotes

You follow the overall page flow illustrated in the following diagram when creating quotes.



When creating a quote, you begin in the Create Quote (1) page by searching for a sold-to customer or deciding to create a new sold-to customer. If you search for a sold-to customer, your search results appear in the Create Quote (2) page.

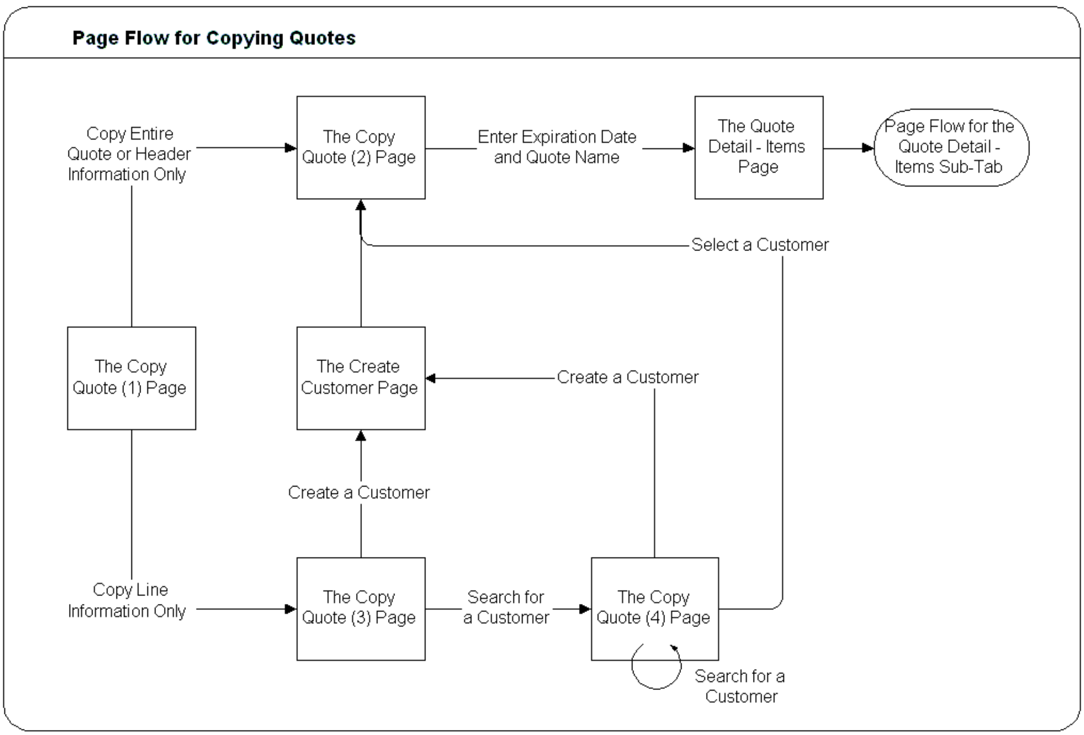
In the Create Quote (2) page, you can search again for a sold-to customer and view your results in the same page, select a sold-to customer, or choose to create a new sold-to customer.

If you select a sold-to customer, you continue to the Create Quote (3) page, where you enter the expiration date and quote name to create the quote. The Quote Detail - Items page opens and you enter the page flow for the Quote Detail - Items sub-tab.

If you choose to create a sold-to customer in the Create Quote (1) page or Create Quote (2) page, the Create Customer page opens. Create your sold-to customer in the Create Customer page. Next, you continue to the Create Quote (3) screen and enter the expiration date and quote name to create the quote. The Quote Detail - Items page opens and you enter the page flow for the Quote Detail - Items sub-tab.

A.1.3 Page Flow for Copying Quotes

You follow the overall page flow illustrated in the following diagram when copying quotes.



When copying a quote, you begin in the Copy Quote (1) page by choosing to copy the entire quote, only the header information, or only the line information.

If you choose to copy the entire quote or only the header information, you continue to the Copy Quote (2) page, where you enter the expiration date and quote name to create the new quote. The Quote Detail - Items page opens and you enter the page flow for the Quote Detail - Items sub-tab.

If you choose to copy only the line information, you continue to the Copy Quote (3) page, where you search for a sold-to customer or decide to create a new sold-to customer. If you search for a sold-to customer, your search results appear in the Copy Quote (4) page.

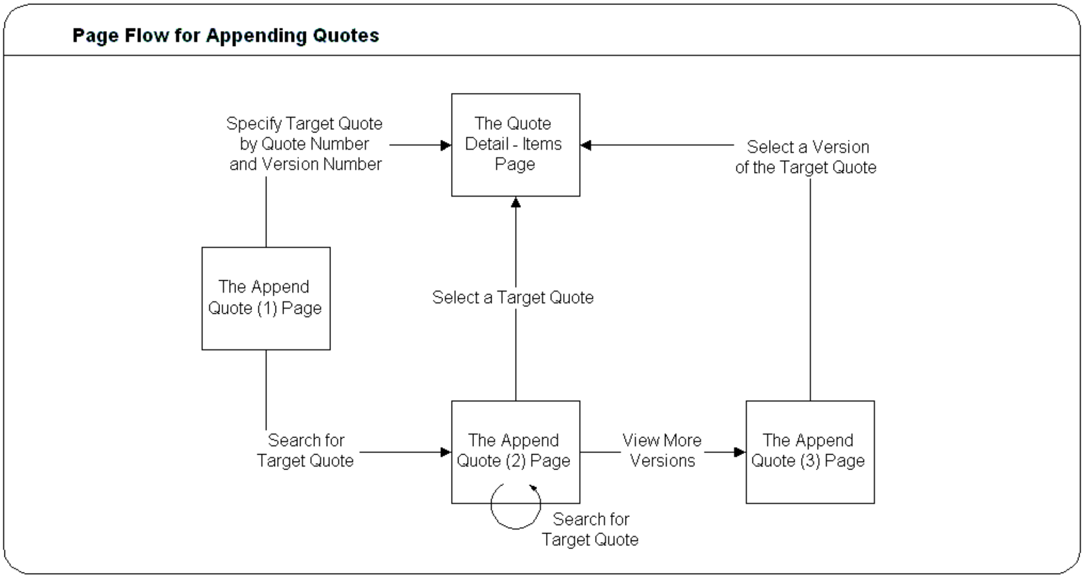
In the Copy Quote (4) page, you can search again for a sold-to customer and view your results in the same page, select a sold-to customer, or choose to create a new sold-to customer.

If you select a sold-to customer, you continue to the Copy Quote (2) page, where you enter the expiration date and quote name to create the new quote. The Quote Detail - Items page opens and you enter the page flow for the Quote Detail - Items sub-tab.

If you choose to create a sold-to customer in the Copy Quote (3) page or Copy Quote (4) page, the Create Customer page opens. Create your sold-to customer in the Create Customer page. Next, you continue to the Copy Quote (2) screen and enter the expiration date and quote name to create the new quote. The Quote Detail - Items page opens and you enter the page flow for the Quote Detail - Items sub-tab.

A.1.4 Page Flow for Appending Quotes

You follow the overall page flow illustrated in the following diagram when appending quotes.



When appending a quote, you begin in the Append Quote (1) page by either specifying the target quote by quote number and version number, or searching for the target quote.

If you specify the target quote by quote number and version number, the Quote Detail - Items page of the target quote opens, displaying the line items from the appended quote, and you enter the page flow for the Quote Detail - Items sub-tab.

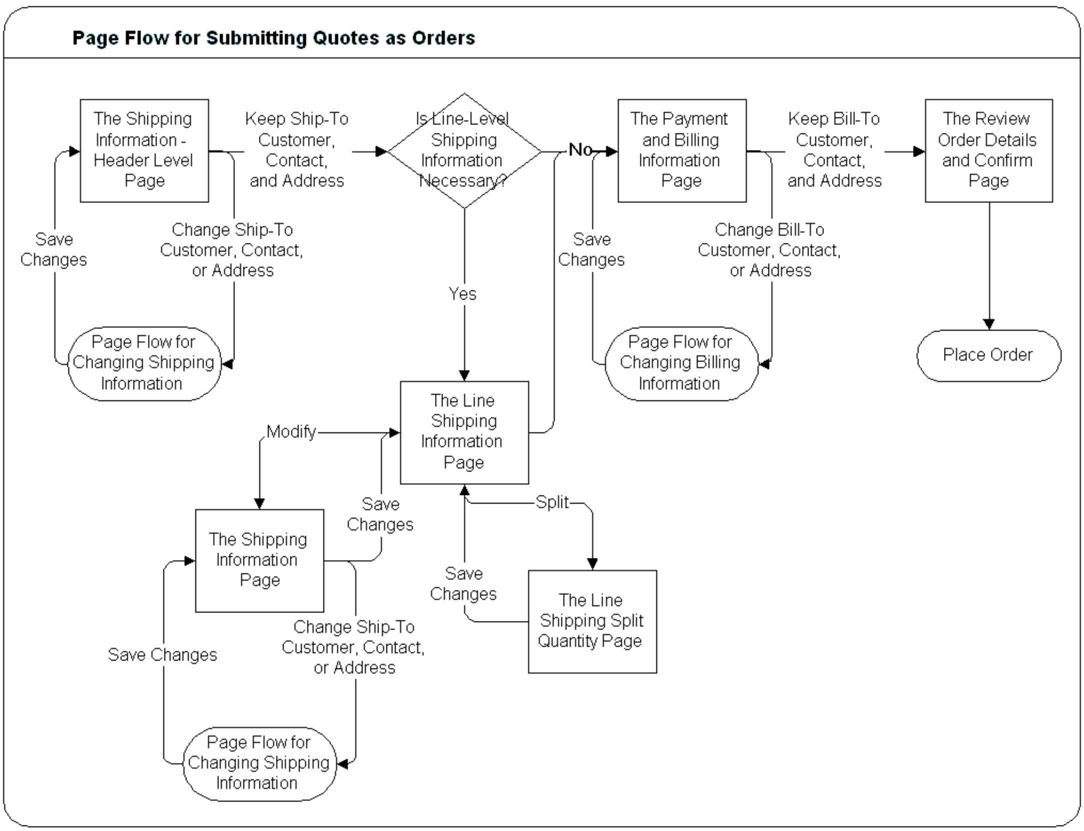
If you search for the target quote, you continue to the Append Quote (2) page, where you can search again for a target quote and view your results in the same page, select a target quote, or choose to view more versions of a target quote.

If you select a target quote, the Quote Detail - Items page of the target quote opens, displaying the line items from the appended quote, and you enter the page flow for the Quote Detail - Items sub-tab.

If you choose to view more versions of a target quote, you continue to the Append Quote (3) page, where you select the version of the target quote to which you want to append the source quote. The Quote Detail - Items page of the target quote opens, displaying the line items from the appended quote, and you enter the page flow for the Quote Detail - Items sub-tab.

A.1.5 Page Flow for Submitting Quotes as Orders

You follow the overall page flow illustrated in the following diagram when submitting quotes as orders.



When submitting a quote as an order, you begin in the Shipping Information - Header Level page, where you enter the header-level shipping information using the page flow for changing shipping information. You also specify whether you need to enter line-level shipping information.

If you do not need to enter line-level shipping information, you continue to the Payment and Billing Information page.

If you need to enter line-level shipping information, you continue to the Line Shipping Information page. Next, if you choose to split a line item into multiple lines, you continue to the Line Shipping Split Quantity page. When you finish splitting the line item, you return to the Line Shipping Information page.

In the Line Shipping Information page, when you select a line item to modify its shipping information, the Shipping Information page for that line item opens.

In the Shipping Information page, you enter the line-level shipping information using the page flow for changing shipping information. When you finish entering the line-level shipping information, you return to the Line Shipping Information page.

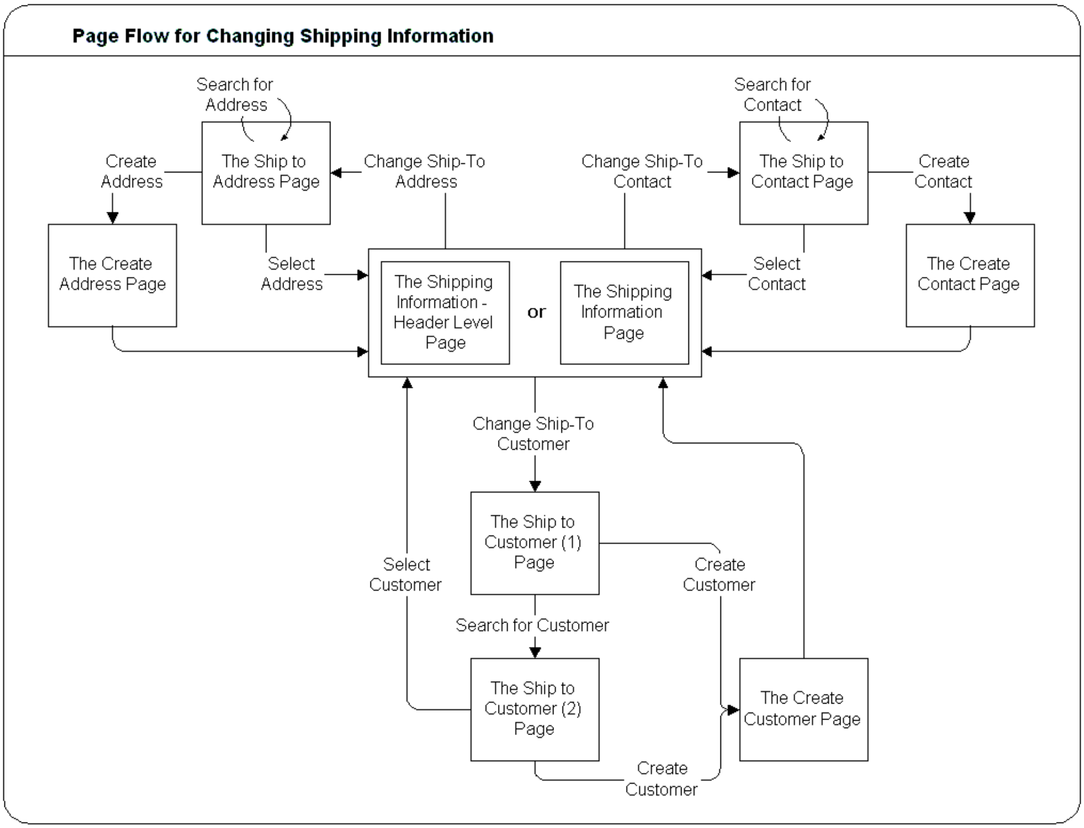
From the Line Shipping Information page, you continue to the Payment and Billing Information page.

In the Payment and Billing Information page, you enter payment and billing information for the quote using the page flow for changing billing information.

When you finish entering information in the Payment and Billing Information page, you continue to the Review Order Details and Confirm page, where you place the order.

A.1.6 Page Flow for Changing Shipping Information

You follow the overall page flow illustrated in the following diagram when changing shipping information.



In the Shipping Information - Header Level page and the Shipping Information page, you can choose to change the ship-to customer, contact, or address.

If you choose to change the ship-to customer, the Ship to Customer (1) page opens. In the Ship to Customer (1) page, you search for a ship-to customer or decide to create a new ship-to customer. If you search for a ship-to customer, the Ship to Customer (2) page opens with your search results.

In the Ship to Customer (2) page, you can search again for a ship-to customer and view your results in the same page, select a ship-to customer, or choose to create a new ship-to customer.

If you select a ship-to customer, you return to the Shipping Information - Header Level page or the Shipping Information page.

If you choose to create a ship-to customer in the Ship to Customer (1) page or Ship to Customer (2) page, the Create Customer page opens. Create your ship-to customer in the Create Customer page. Next, you return to the Shipping Information - Header Level page or the Shipping Information page.

If you choose to change the ship-to contact, the Ship to Contact page opens. In the Ship to Contact page, you can search for a ship-to contact and view your results in the same page, select a ship-to contact, or choose to create a new ship-to contact.

If you select a ship-to contact, you return to the Shipping Information - Header Level page or the Shipping Information page.

If you choose to create a ship-to contact in the Ship to Contact page, the Create Contact page opens. Create your ship-to contact in the Create Contact page. Next, you return to the Shipping Information - Header Level page or the Shipping Information page.

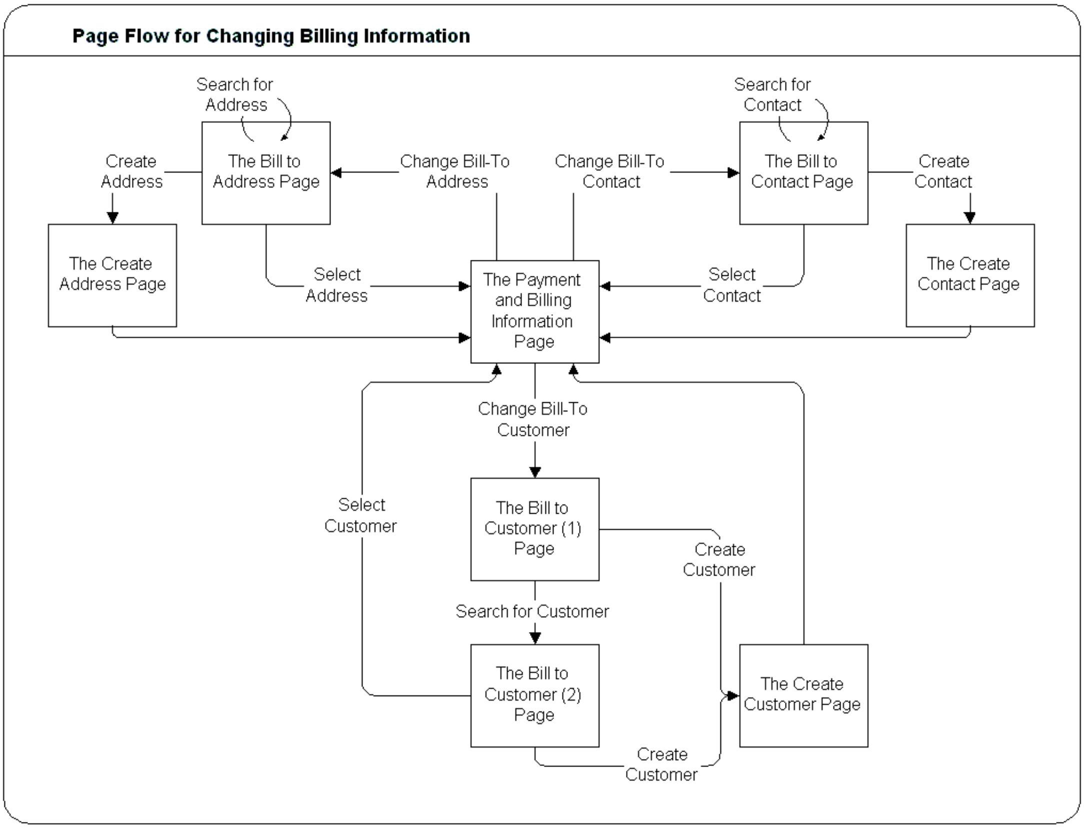
If you choose to change the ship-to address, the Ship to Address page opens. In the Ship to Address page, you can search for a ship-to address and view your results in the same page, select a ship-to address, or choose to create a new ship-to address.

If you select a ship-to address, you return to the Shipping Information - Header Level page or the Shipping Information page.

If you choose to create a ship-to address in the Ship to Address page, the Create Address page opens. Create your ship-to address in the Create Address page. Next, you return to the Shipping Information - Header Level page or the Shipping Information page.

A.1.7 Page Flow for Changing Billing Information

You follow the overall page flow illustrated in the following diagram when changing billing information.



In the Payment and Billing Information page, you can choose to change the bill-to customer, contact, or address.

If you choose to change the bill-to customer, the Bill to Customer (1) page opens. In the Bill to Customer (1) page, you search for a bill-to customer or decide to create a new bill-to customer. If you search for a bill-to customer, the Bill to Customer (2) page opens with your search results.

In the Bill to Customer (2) page, you can search again for a bill-to customer and view your results in the same page, select a bill-to customer, or choose to create a new bill-to customer.

If you select a bill-to customer, you return to the Payment and Billing Information page.

If you choose to create a bill-to customer in the Bill to Customer (1) page or Bill to Customer (2) page, the Create Customer page opens. Create your bill-to customer in the Create Customer page. Next, you return to the Payment and Billing Information page.

If you choose to change the bill-to contact, the Bill to Contact page opens. In the Bill to Contact page, you can search for a bill-to contact and view your results in the same page, select a bill-to contact, or choose to create a new bill-to contact.

If you select a bill-to contact, you return to the Payment and Billing Information page.

If you choose to create a bill-to contact in the Bill to Contact page, the Create Contact page opens. Create your bill-to contact in the Create Contact page. Next, you return to the Payment and Billing Information page.

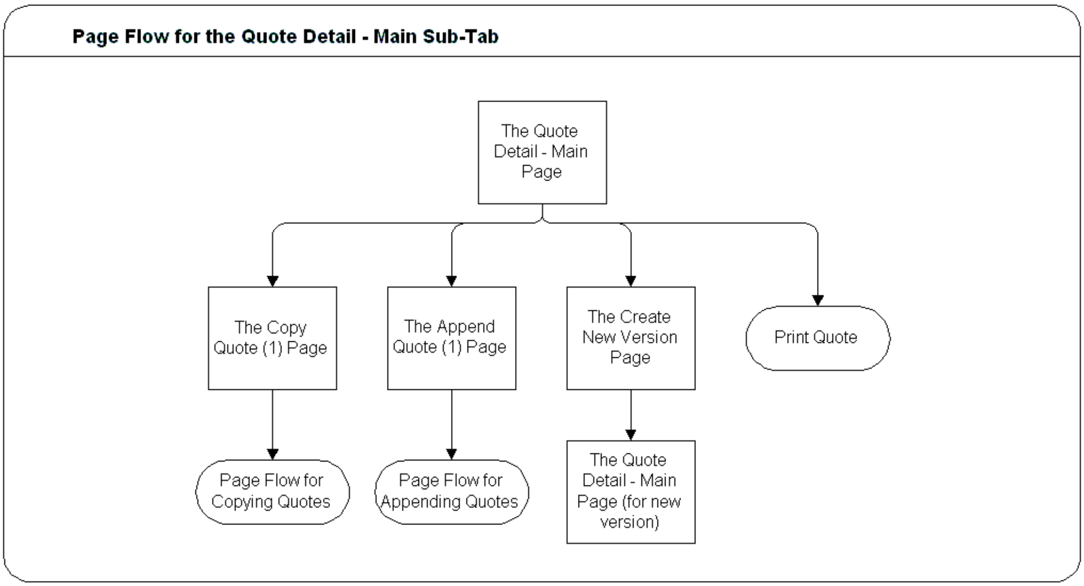
If you choose to change the bill-to address, the Bill to Address page opens. In the Bill to Address page, you can search for a bill-to address and view your results in the same page, select a bill-to address, or choose to create a new bill-to address.

If you select a bill-to address, you return to the Payment and Billing Information page.

If you choose to create a bill-to address in the Bill to Address page, the Create Address page opens. Create your bill-to address in the Create Address page. Next, you return to the Payment and Billing Information page.

A.1.8 Page Flow for the Quote Detail - Main Sub-Tab

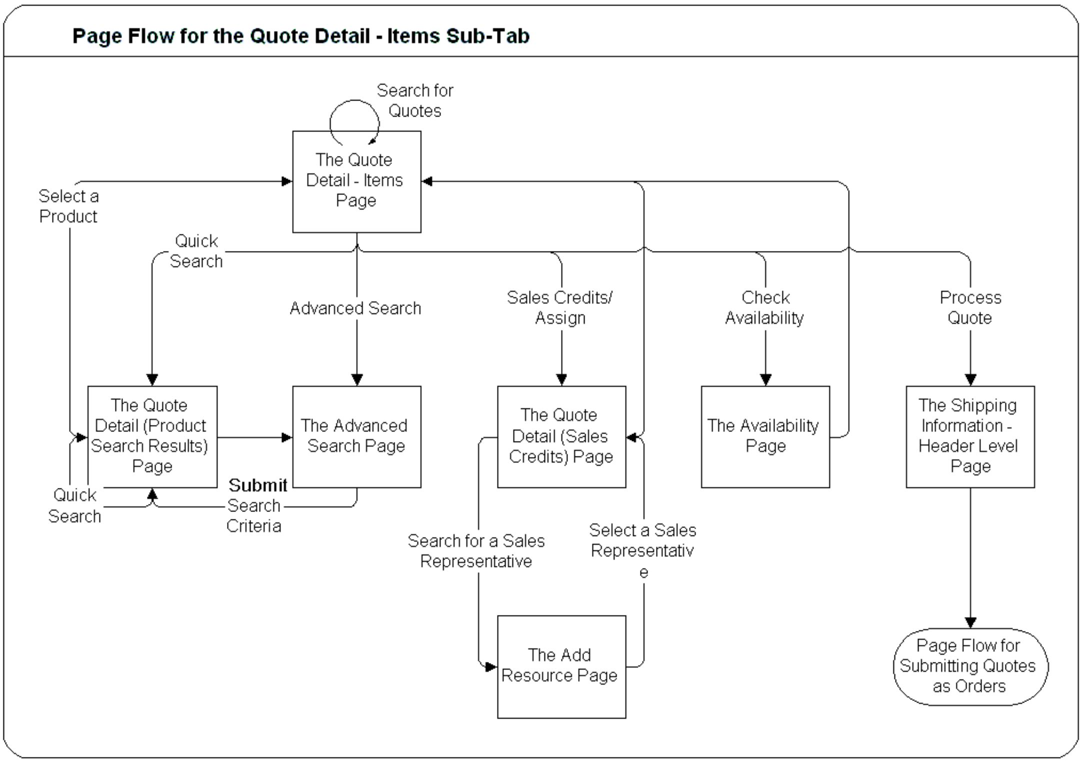
You follow the overall page flow illustrated in the following diagram when working in the Quote Detail - Main sub-tab.



From the Quote Detail - Main page, you can choose to copy the quote and enter the page flow for copying quotes, append the quote and enter the page flow for appending quotes, create a new version of the quote, or view a printable layout of the quote.

A.1.9 Page Flow for the Quote Detail - Items Sub-Tab

You follow the overall page flow illustrated in the following diagram when working in the Quote Detail - Items sub-tab.



From the Quote Detail - Items page, you can perform a quick search for products, go to the advanced search for products, assign sales credits, check availability of products, or process the quote.

If you perform a quick search for a product, the Quote Detail (Product Search Results) page opens with your search results. You can search again for a product and view the quick search results in this page, choose to perform an advanced search, or select a product and add it to your quote.

If you decide to perform an advanced search for a product, in either the Quote Detail - Items page or the Quote Detail (Product Search Results) page, the Advanced Search page opens.

In the Advanced Search page, you enter and submit search criteria. The Quote Detail (Product Search Results) page opens with your search results. You can search again for a product and view the quick search results in this page, choose to perform an advanced search, or select a product and add it to your quote.

When you select a product in the Quote Detail (Product Search Results) page and add it to your quote, you return to the Quote Detail - Items page.

When you choose to assign sales credits at the header or line level, the Quote Detail (Sales Credits) page opens. You can enter sales credit allocation percentages for different sales representatives here. If you choose to search for a sales representative, the Add Resource page opens.

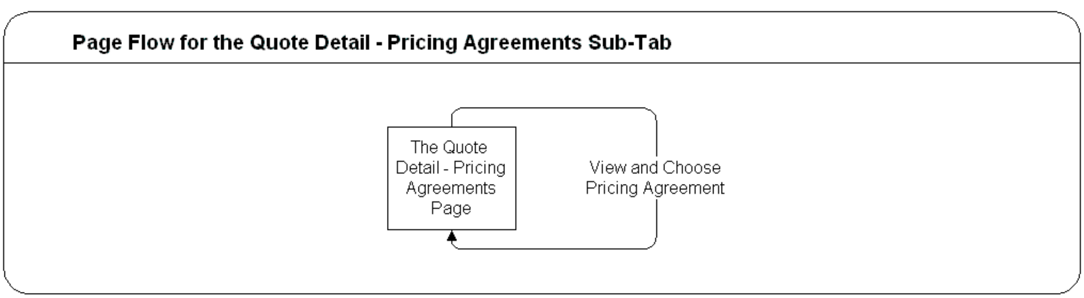
In the Add Resource page, you search for and select a sales representative, then return to the Quote Detail (Sales Credits) page. When you have finished allocating sales credits, you return to the Quote Detail - Items page.

When you choose to check availability of the products in your quote, the Availability page opens. Enter the dates by which the products are needed and check for their availability. When you are finished, you return to the Quote Detail - Items page.

When you are ready to submit the quote as an order, you process the quote and enter the page flow for submitting quotes as orders.

A.1.10 Page Flow for the Quote Detail - Pricing Agreements Sub-Tab

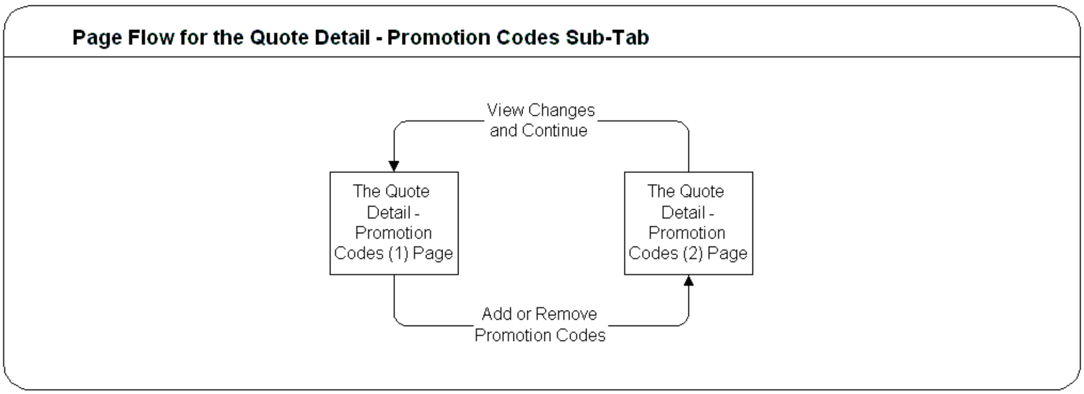
You follow the overall page flow illustrated in the following diagram when working in the Quote Detail - Pricing Agreements sub-tab.



In the Quote Detail - Pricing Agreements page, you view all applicable pricing agreements and choose the one that you want to apply to the quote. When you apply a pricing agreement, the Quote Detail - Pricing Agreements page refreshes with the quote's updated pricing agreement information.

A.1.11 Page Flow for the Quote Detail - Promotion Codes Sub-Tab

You follow the overall page flow illustrated in the following diagram when working in the Quote Detail - Promotion Codes sub-tab.

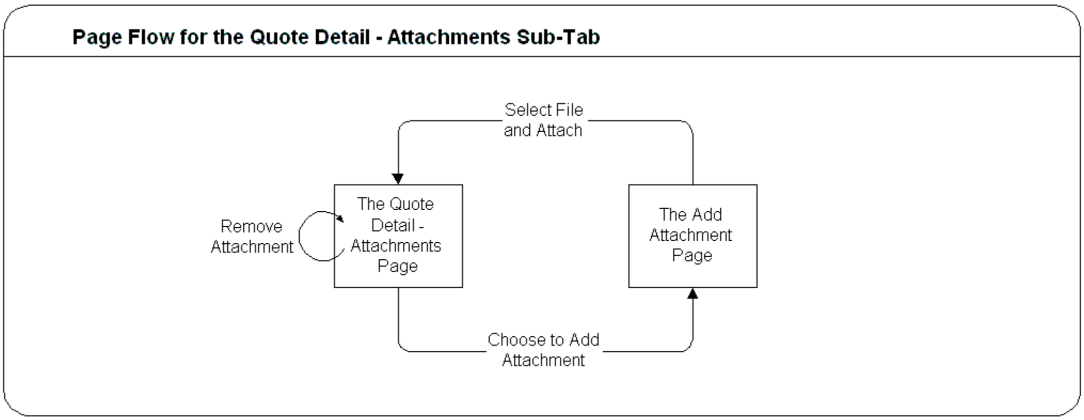


In the Quote Detail - Promotion Codes (1) page, you can add or remove promotion codes. When you save changes to the promotion code list, the Quote Detail - Promotion Codes (2) page opens.

In the Quote Detail - Promotion Codes (2) page, you can view the changes you have made, then return to the Quote Detail - Promotion Codes (1) page.

A.1.12 Page Flow for the Quote Detail - Attachments Sub-Tab

You follow the overall page flow illustrated in the following diagram when working in the Quote Detail - Attachments sub-tab.

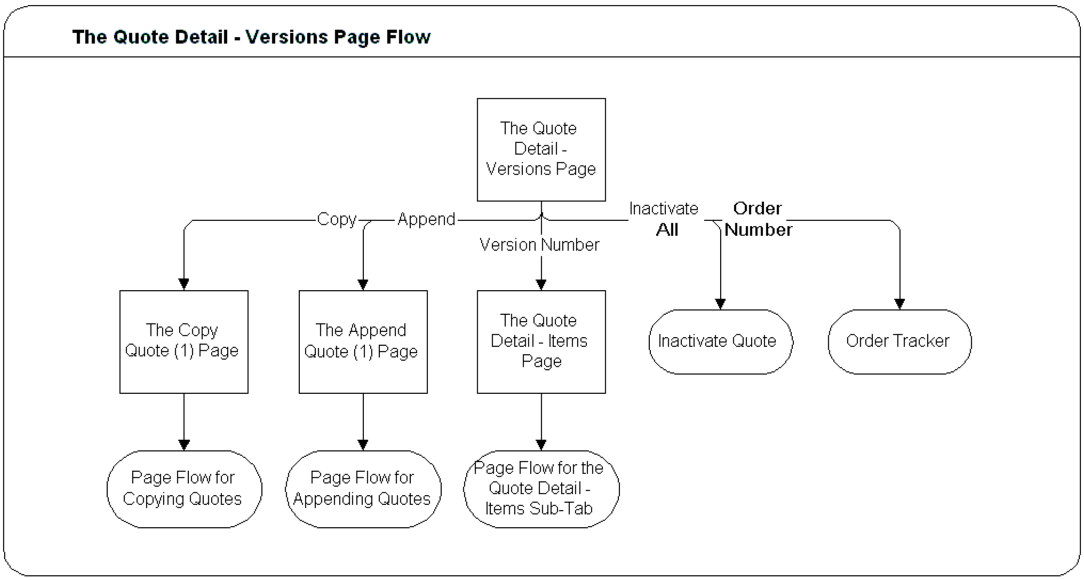


In the Quote Detail - Attachments page, you can view a list of the files that are attached to the quote, remove files, or choose to attach files. If you remove files, the Quote Detail - Attachments page refreshes with your updated list of attachments.

If you choose to add an attachment, the Add Attachment page opens. You can select a file to attach, then return to the Quote Detail - Attachments page.

A.1.13 Page Flow for the Quote Detail - Versions Sub-Tab

You follow the overall page flow illustrated in the following diagram when working in the Quote Detail - Versions sub-tab.



In the Quote Detail - Versions page, you can view a list of all existing versions of the quote, choose to copy a quote version and enter the page flow for copying quotes, append a quote version and enter the page flow for appending quotes, view a quote version's details and enter the page flow for the Quote Detail - Items sub-tab, inactivate the quote, or view the order details of a quote version with an Ordered status.

A.2 The Quote Listing Page

Use the Quote Listing page to view a list of your quotes, search for quotes, navigate to quote details, begin creating, copying, or appending quotes, inactivate quotes, and search for more quote versions.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–1 The Quote Listing Page Reference

UI Object Name	Type	Description/Usage
Parameter	Pull-down menu/ Text field	Choose the parameter by which you want to search for a quote: **Quote Number, Quote Name,** or **Customer.** In the text field, enter the corresponding information. Use % as a lagging wildcard character if necessary. **Note:** There must be some information in this field before you can proceed.
Status	Pull-down menu	Choose the status of the quote for which you are searching.
Last Modified Between	Text fields	Enter the date range of the last modification of the quote for which you are searching, in DD-MON-YYYY format.
Calendar	Button	Click to use a date picker to enter dates in the Last Modified Between text fields.
Go	Button	Click to search for a quote with your specified parameters.
Create	Button	Click to create a new quote in the Create Quote page.
Copy	Button	Click to copy the selected quote in the Copy Quote page.
Append	Button	Click to append the selected quote in the Append Quote page.
Inactivate	Button	Click to inactivate all versions of the selected quote.
View More Versions	Button	Click to view all versions of the selected quote that match the default Quote Listing criteria or your search criteria in the Quotes page.
Select	Radio button	Highlight to select a quote.

Table A–1 The Quote Listing Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Quote Name	Hyperlink	Displays the quote name. Click to view the Quote Detail - Items page for the quote.
Customer	Column	Displays the sold-to customer.
Quote Number	Column	Displays the quote number.
Version	Column	Displays the version number. This page displays the highest version of each quote that matches the default Quote Listing page criteria or your search criteria.
Last Modified Date	Column	Displays the date that the quote was last modified.
Status	Column	Displays the quote's status.
Total Amount	Column	Displays the quote's total amount.
First	Hyperlink	Click to go to the first page of your list of quotes.
Previous	Hyperlink	Click to go to the previous page of your list of quotes.
Next	Hyperlink	Click to go to the next page of your list of quotes.
Last	Hyperlink	Click to go to the last page of your list of quotes.

See Also

Section 1.4.1, "Process Flow for Viewing and Searching for Quotes"

Section 2.2, "The Quote Listing Page"

Section 2.3, "Viewing Quotes"

Section A.1.1, "Page Flow for Using the Quote Listing Page"

A.3 Quotes

Use the Quotes page to view a list of versions of a quote that match the default Quote Listing criteria or your search criteria, begin copying or appending a quote version, navigate to details for a quote version, and inactivate a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–2 Quotes Page Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the sold-to customer.
Quote Name	Read-only field	Displays the quote name.
Quote Number	Read-only field	Displays the quote number.
Quote Search Results - All Applicable Versions	Section	Displays the versions of the quote that match the default Quote Listing criteria or your search criteria.
Copy	Button	Click to copy the selected quote in the Copy Quote page.
Append	Button	Click to append the selected quote in the Append Quote page.
Inactivate All	Button	Click to inactivate all versions of the quote.
Select	Radio button	Highlight to select a version.
Version	Hyperlink	Displays the version number. Click to view the quote’s Quote Detail - Items page.
Last Modified Date	Column	Displays the date that the quote version was last modified.
Creation Date	Column	Displays the date that the quote version was created.
Status	Column	Displays the quote version’s status.
Total Amount	Column	Displays the total amount of the quote version.
Order Detail	Column/ Hyperlink	Displays the order number for a quote version that was placed as an order. Click to view the order’s status in the Order Tracker.
First	Hyperlink	Click to go to the first page of your list of quote versions.

Table A–2 Quotes Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Previous	Hyperlink	Click to go to the previous page of your list of quote versions.
Next	Hyperlink	Click to go to the next page of your list of quote versions.
Last	Hyperlink	Click to go to the last page of your list of quote versions.

See Also

Section 2.3.2, "Searching for More Versions of Quotes"

Section A.1.1, "Page Flow for Using the Quote Listing Page"

A.4 Create Quote (1)

Use the Create Quote (1) page to search for a sold-to customer or begin creating a new sold-to customer, when you are creating a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–3 Create Quote (1) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the sold-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the sold-to customer's party type.
Customer Account Number	Text field	Enter the sold-to customer's account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country of the sold-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a sold-to customer with the criteria that you have specified.

Table A–3 Create Quote (1) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Create Customer	Button	Click to create a new sold-to customer in the Create Customer page.

See Also

Section 1.4.2, "Process Flow for Creating a Quote"

Section 2.5, "Creating Quotes"

Section 2.5.1, "Creating New Quotes"

Section A.1.2, "Page Flow for Creating Quotes"

A.5 Create Quote (2)

Use the Create Quote (2) page to search for and select a sold-to customer or begin creating a new sold-to customer, when you are creating a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–4 Create Quote (2) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the sold-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the sold-to customer’s party type.
Customer Account Number	Text field	Enter the sold-to customer’s account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country of the sold-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a sold-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new sold-to customer in the Create Customer page.

Table A–4 Create Quote (2) Page Reference

UI Object Name	Type	Description/Usage
Select	Radio button	Highlight to select a sold-to customer.
Customer Name	Column	Displays the customer's name.
Account Number	Column	Displays the customer's account number.
Address	Column	Displays the customer's address.
Primary	Column	Displays whether the address is the primary one of the given address type for the customer. The primary addresses have a checkmark in this column.
Type	Column	Displays the type of the address, e.g., Main, Ship-to, Bill-to, Mailing.
Continue	Button	Click to go to the next page in the Create Quote process flow.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of your search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

Section 1.4.2, "Process Flow for Creating a Quote"

Section 2.5, "Creating Quotes"

Section 2.5.1, "Creating New Quotes"

Section A.1.2, "Page Flow for Creating Quotes"

A.6 Create Quote (3)

Use the Create Quote (3) page to enter the expiration date and quote name when you are creating a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–5 Create Quote (3) Page Reference

UI Object Name	Type	Description/Usage
Quote Name	Text field	Enter the quote name for the new quote.
Expiration Date	Text field	Enter the expiration date for the new quote in DD-MON-YYYY format. This value is initially defaulted according to your system administrator's settings.
Calendar	Button	Click to use a date picker to enter a date in the Expiration Date text field.
Customer	Read-only field	Displays the sold-to customer for the quote.
Continue	Button	Click to create the quote and view its Quote Detail - Items page.
Clear	Button	Click to clear the fields on the page without saving your changes.

See Also

Section 1.4.2, "Process Flow for Creating a Quote"

Section 2.5, "Creating Quotes"

Section 2.5.1, "Creating New Quotes"

Section A.1.2, "Page Flow for Creating Quotes"

A.7 Copy Quote (1)

Use the Copy Quote (1) page to decide whether to copy an entire quote, quote header information only, or quote line information only to a new quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–6 Copy Quote (1) Page Reference

UI Object Name	Type	Description/Usage
Quote Name	Read-only field	Displays the source quote's name.
Quote Number	Read-only field	Displays the source quote's number and version.
Customer	Read-only field	Displays the source quote's sold-to customer.
Copy the header and line information from the above quote to a new quote associated with the same customer.	Radio button	Highlight to copy the entire source quote, both header and line data, to a new quote for the same sold-to customer.
Copy the header information only from the above quote to a new quote associated with the same customer.	Radio button	Highlight to copy only the header data from the source quote to a new quote for the same sold-to customer.
Copy the item information only from the above quote to a new quote associated with a different customer.	Radio button	Highlight to copy only the item information from the source quote to a new quote for a different sold-to customer.
Continue	Button	Click to go to the next page in the Copy Quote process flow.

See Also

Section 1.4.4, "Process Flow for Copying a Quote"

Section 2.8, "Copying Quotes"

Section A.1.3, "Page Flow for Copying Quotes"

A.8 Copy Quote (2)

Use the Copy Quote (2) page to enter the new quote's expiration date and quote name when copying a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–7 Copy Quote (2) Page Reference

UI Object Name	Type	Description/Usage
Copy From:	Section	Displays information about the source quote.
Quote Name	Read-only field	Displays the source quote's name.
Quote Number	Read-only field	Displays the source quote's number and version.
Customer	Read-only field	Displays the source quote's sold-to customer.
Copy To:	Section	Enter information about the new quote.
Quote Name	Text field	Enter a quote name for the new quote.
Expiration Date	Text field	Enter an expiration date for the new quote in DD-MON-YYYY format.
Calendar	Button	Click to use a date picker to enter a date in the Expiration Date text field.
Customer	Read-only field	Displays the sold-to customer for the new quote.
Create	Button	Click to create the new quote and open its Quote Detail - Items page.
Clear	Button	Click to clear the fields on the page without saving your changes.

See Also

Section 1.4.4, "Process Flow for Copying a Quote"

Section 2.8, "Copying Quotes"

Section A.1.3, "Page Flow for Copying Quotes"

A.9 Copy Quote (3)

Use the Copy Quote (3) page to search for a sold-to customer or begin creating a new customer, when copying a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–8 Copy Quote (3) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the sold-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the sold-to customer's party type.
Customer Account Number	Text field	Enter the sold-to customer's account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country for the sold-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a sold-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new sold-to customer in the Create Customer page.

See Also

Section 1.4.4, "Process Flow for Copying a Quote"

Section 2.8, "Copying Quotes"

Section 2.8.3, "Copying Line Information to a New Quote"

Section A.1.3, "Page Flow for Copying Quotes"

A.10 Copy Quote (4)

Use the Copy Quote (4) page to search for and select a sold-to customer or begin creating a new customer, when copying a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–9 Copy Quote (4) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the sold-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the sold-to customer's party type.
Customer Account Number	Text field	Enter the sold-to customer's account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country for the sold-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a sold-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new sold-to customer in the Create Customer page.
Select	Radio button	Highlight to select a sold-to customer.
Customer Name	Column	Displays the customer's name.
Account Number	Column	Displays the customer's account number.
Address	Column	Displays the customer's address.
Primary	Column	Displays whether the address is the primary one of the given address type for the customer. The primary addresses have a checkmark in this column.
Address Type	Column	Displays the type of the address, e.g., Main, Ship-to, Bill-to, Mailing.
Continue	Button	Click to proceed to the next page in the Copy Quote process flow.

Table A–9 Copy Quote (4) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

Section 1.4.4, "Process Flow for Copying a Quote"

Section 2.8, "Copying Quotes"

Section 2.8.3, "Copying Line Information to a New Quote"

Section A.1.3, "Page Flow for Copying Quotes"

A.11 Append Quote (1)

Use the Append Quote (1) page to specify a target quote by quote number and version number or search for a target quote, when appending a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–10 Append Quote (1) Page Reference

UI Object Name	Type	Description/Usage
Append From:	Section	Displays information about the source quote.
Customer	Read-only field	Displays the source quote’s sold-to customer.
Quote Name	Read-only field	Displays the source quote’s name.
Quote Number	Read-only field	Displays the source quote’s number and version.
Append To:	Section	Use this to specify the target quote.
Append the above quote to:	Radio button	Highlight to specify the target quote by quote number and version.

Table A–10 Append Quote (1) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Quote Number	Text field	Enter the target quote number.
Version	Text field	Enter the target quote version number.
Search and select target quote:	Radio button	Highlight to search for the target quote if you do not know its quote number and version.
Parameter	Pull-down menu/ Text field	Choose the parameter by which you want to search for a quote: **Quote Number, Quote Name,** or **Customer.** In the text field, enter the corresponding information. Use % as a lagging wildcard character if necessary.
Status	Pull-down menu	Choose the status of the quote for which you are searching.
Last Modified Between	Text fields	Enter the date range of the last modification of the quote for which you are searching, in DD-MON-YYYY format.
Calendar	Button	Use this as a date picker to enter dates in the Last Modified Between text fields.
Go	Button	If you highlighted the Append the above quote to radio button, click to append to the target quote you specified by quote and version number and view its Quote Detail - Items page. If you highlighted the Search and select target quote radio button, click to search for a target quote with your specified parameters.

See Also

Section 1.4.5, "Process Flow for Appending a Quote"

Section 2.9, "Appending Quotes"

Section A.1.4, "Page Flow for Appending Quotes"

A.12 Append Quote (2)

Use the Append Quote (2) page to search for and select a target quote or begin viewing more versions of a target quote, when appending a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–11 Append Quote (2) Page Reference

UI Object Name	Type	Description/Usage
Append From:	Section	Displays information about the source quote.
Customer	Read-only field	Displays the source quote's sold-to customer.
Quote Name	Read-only field	Displays the source quote's name.
Quote Number	Read-only field	Displays the source quote's number and version.
Append To:	Section	Use this to specify the target quote.
Parameter	Pull-down menu/ Text field	Choose the parameter by which you want to search for a quote: **Quote Number, Quote Name,** or **Customer.** In the text field, enter the corresponding information. Use % as a lagging wildcard character if necessary.
Status	Pull-down menu	Choose the status of the quote for which you are searching.
Last Modified Between	Text fields	Enter the date range of the last modification of the quote for which you are searching, in DD-MON-YYYY format.
Calendar	Button	Use this as a date picker to enter dates in the Last Modified Between text fields.
Go	Button	Click to search for a target quote with your specified parameters.
Quote Search Results	Section	Displays the highest version of each quote that matches your search criteria. Select a target quote here.
Append To	Button	Click to append the source quote to the selected target quote and view the target quote's Quote Detail - Items page.
View More Versions	Button	Click to view other versions of the selected quote that match your search criteria in the next page of the Append Quote process flow.

Table A–11 Append Quote (2) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Select	Radio button	Highlight to select a target quote.
Quote Name	Hyperlink	Displays the quote's name. Click to view the Quote Detail - Items page for the quote.
Customer	Column	Displays the sold-to customer for the quote.
Quote Number	Column	Displays the quote number.
Version	Column	Displays the version number.
Last Modified Date	Column	Displays the date that the quote was last modified.
Status	Column	Displays the quote's status.
Total Amount	Column	Displays the quote's total amount.
Order Detail	Column/ Hyperlink	Displays the order number for a quote version that was placed as an order. Click to view the order's status in the Order Tracker.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of your search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

Section 1.4.5, "Process Flow for Appending a Quote"

Section 2.9, "Appending Quotes"

Section A.1.4, "Page Flow for Appending Quotes"

A.13 Append Quote (3)

Use the Append Quote (3) page to select a version of the target quote when appending a quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–12 Append Quote (3) Page Reference

UI Object Name	Type	Description/Usage
Append From:	Section	Displays information about the source quote.
Customer	Read-only field	Displays the source quote's sold-to customer.
Quote Name	Read-only field	Displays the source quote's name.
Quote Number	Read-only field	Displays the source quote's number and version.
Append To:	Section	Displays information about the target quote.
Quote Name	Read-only field	Displays the target quote's name.
Quote Number	Read-only field	Displays the target quote's number and version.
Customer	Read-only field	Displays the target quote's sold-to customer.
Quote Search Results	Section	Displays all versions of the target quote that match your search criteria.
Select	Radio button	Highlight to select a quote version.
Version	Hyperlink	Displays the version number. Click to view the version's Quote Detail - Items page.
Last Modified Date	Column	Displays the date that the version was last modified.
Creation Date	Column	Displays the date that the version was created.
Status	Column	Displays the quote's status.
Total Amount	Column	Displays the quote's total amount.
First	Hyperlink	Click to go to the first page of the version list.
Previous	Hyperlink	Click to go to the previous page of the version list.
Next	Hyperlink	Click to go to the next page of the version list.

Table A–12 Append Quote (3) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Last	Hyperlink	Click to go to the last page of the version list.
Append To	Button	Click to append the source quote to the selected version of the target quote and view the target quote's Quote Detail - Items page.

See Also

Section 1.4.5, "Process Flow for Appending a Quote"

Section 2.9, "Appending Quotes"

Section A.1.4, "Page Flow for Appending Quotes"

A.14 Shipping Information - Header Level

Use the Shipping Information - Header Level page to enter header level shipping information for the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–13 Shipping Information - Header Level Page Reference

UI Object Name	Type	Description/Usage
Sold to Customer	Section	Displays information about the quote's sold-to customer.
Name	Read-only field	Displays the sold-to customer's name.
Shipping Method	Section/ Pull-down menu	Displays information about the shipping method for this quote. Use this to select a shipping method.
Ship to Customer	Section	Displays information about the ship-to customer.
Name	Read-only field	Displays the ship-to customer's name.
Change	Button	Click to change the ship-to customer.
Ship to Contact	Section	Displays information about the ship-to contact.
Name	Read-only field	Displays the ship-to contact's name.
Phone	Read-only field	Displays the ship-to contact's phone number.

Table A–13 Shipping Information - Header Level Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Email	Read-only field	Displays the ship-to contact's e-mail address.
Change	Button	Click to change the ship-to contact.
Ship to Address	Section/ Read-only field	Displays information about the ship-to address.
Change	Button	Click to change the ship-to address.
Shipping Instructions	Section	Specify shipping instructions for the quote here.
Requested Delivery Date	Text field	Enter the requested delivery date for the quote in DD-MON-YYYY format.
Calendar	Button	Click to use a date picker to enter a date in the Requested Delivery Date text field.
Shipping Instructions	Text field	Enter shipping instructions.
Packing Instructions	Text field	Enter packing instructions.
Line Level Shipping	Section	Specify whether you want to use different shipping information for any line item.
Yes	Radio button	Highlight to send all line items to the shipping customer, contact, and address specified in this page.
No	Radio button	Highlight to send at least one line item to a different shipping customer, contact, or address than the ones specified in this page.
Continue	Button	Click to go to the next page in the process quote flow. If you highlighted Yes, the Payment and Billing Information page opens. If you highlighted No, the Line Shipping Information page opens.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.5, "Page Flow for Submitting Quotes as Orders"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.15 Line Shipping Information

Use the Line Shipping Information page to begin modifying line-level shipping information and splitting line items into multiple lines.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–14 Line Shipping Information Page Reference

UI Object Name	Type	Description/Usage
Modify	Button	Click to change shipping information for the selected line item.
Split	Button	Click to split the selected line item into more than one line.
Continue	Button	Click when you have finished entering line level shipping information, to view the Payment and Billing Information page.
Select	Radio button	Highlight to select a line item to modify or split.
Part Number	Column	Displays the line item’s part number.
Product	Column	Displays the line item’s product name.
Unit of Measure	Column	Displays the line item’s unit of measure.
Quantity	Column	Displays the quantity of the line item.
Line Level Shipping	Column	Displays the Details buttons.
Details	Button	Click to view shipping information for the line item.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.5, "Page Flow for Submitting Quotes as Orders"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.16 Shipping Information

Use the Shipping Information page to enter shipping information for a line item.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–15 Shipping Information Page Reference

UI Object Name	Type	Description/Usage
Reference	Section	Displays information about the line item for which you are entering line-level shipping information.
Part Number	Read-only field	Displays the line item's part number.
Product	Read-only field	Displays the line item's product name.
Unit of Measure	Read-only field	Displays the line item's unit of measure.
Quantity	Read-only field	Displays the quantity of the line item.
Sold to Customer	Section	Displays information about the sold-to customer.
Name	Read-only field	Displays the sold-to customer's name.
Shipping Method	Section/ Pull-down menu	Displays information about the shipping method for this line item. Use this to select a shipping method.
Ship to Customer	Section	Displays information about the ship-to customer for the line item.
Name	Read-only field	Displays the ship-to customer's name.
Change	Button	Click to change the ship-to customer in the Ship to Customer page.
Ship to Contact	Section	Displays information about the ship-to contact for the line item.
Name	Read-only field	Displays the ship-to contact's name.
Phone	Read-only field	Displays the ship-to contact's phone number.
Email	Read-only field	Displays the ship-to contact's e-mail address.

Table A–15 Shipping Information Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Change	Button	Click to change the ship-to contact in the Ship to Contact page.
Ship to Address	Section/ Read-only field	Displays information about the ship-to address for the line item.
Change	Button	Click to change the ship-to address in the Ship to Address page.
Shipping Instructions	Section	Specify shipping instructions for the line item here.
Requested Delivery Date	Text field	Enter the requested delivery date for the line item in DD-MON-YYYY format.
Calendar	Button	Click to use a date picker to enter a date in the Requested Delivery Date text field.
Shipping Instructions	Text field	Enter shipping instructions for the line item.
Packing Instructions	Text field	Enter packing instructions for the line item.
Continue	Button	Click when you have finished entering shipping information for this line item, to go to the updated Line Shipping Information page.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.5, "Page Flow for Submitting Quotes as Orders"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.17 Line Shipping Split Quantity

Use the Line Shipping Split Quantity page to split a line item into multiple lines.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–16 Line Shipping Split Quantity Page Reference

UI Object Name	Type	Description/Usage
Add Rows	Button	Click to add more Split To text fields, if you need to split the line item into more lines than there are text fields.
Submit	Button	Click to save the line splits.
Part Number	Column	Displays the line item's part number.
Product	Column	Displays the line item's product name.
Unit of Measure	Column	Displays the line item's unit of measure.
Quantity	Column	Displays the total quantity of the line item.
Split To	Text field	Displays the split details for the line item, including the quantity that you have assigned to each line. Enter a split quantity into a text field. The total of the split quantities in all of these text fields should equal the number in the Quantity column.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.5, "Page Flow for Submitting Quotes as Orders"

A.18 Ship to Customer (1)

Use the Ship to Customer (1) page to search for a ship-to customer.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–17 Ship to Customer (1) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the ship-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the ship-to customer's party type.
Customer Account Number	Text field	Enter the ship-to customer's account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country for the ship-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a ship-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new ship-to customer in the Create Customer page.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.19 Ship to Customer (2)

Use the Ship to Customer (2) page to search for and select a ship-to customer or begin creating a new ship-to customer.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–18 Ship to Customer (2) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the ship-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the ship-to customer's party type.
Customer Account Number	Text field	Enter the ship-to customer's account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country for the ship-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a ship-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new ship-to customer in the Create Customer page.
Customer Search Results	Section	Displays the results of your search for a ship-to customer.
Select	Radio button	Highlight to select a ship-to customer.
Customer Name	Column	Displays the customer's name.
Account Number	Column	Displays the customer's account number.
Address	Column	Displays the customer's address.
Primary	Column	Displays whether the address is the primary one of the given address type for the customer. The primary addresses have a checkmark in this column.
Type	Column	Displays the type of the address, e.g., Main, Ship-to, Bill-to, Mailing.

Table A–18 Ship to Customer (2) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Continue	Button	Click to save the selected ship-to customer and view the updated Shipping Information - Header Level page.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of your search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.20 Ship to Contact

Use the Ship to Contact page to search for and select a ship-to contact or begin creating a new ship-to contact.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–19 Ship to Contact Page Reference

UI Object Name	Type	Description/Usage
Search a Contact Name	Text field	Enter the ship-to contact name for which you want to search. Use % as a lagging wildcard character if necessary.
Search	Button	Click to search for a ship-to contact with the criteria that you have specified.

Table A–19 Ship to Contact Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Create Contact	Button	Click to create a new ship-to contact in the Create Contact page.
Contact Search Results for: <Organization Name>	Section	Displays the ship-to contacts for the customer organization named here that match your search criteria.
Select	Radio button	Highlight to select a ship-to contact.
Contact	Column	Displays the contact's name.
Primary Phone	Column	Displays the contact's primary phone number.
Email	Column	Displays the contact's e-mail address.
Continue	Button	Click to save the selected ship-to contact and view the updated Shipping Information - Header Level page.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of your search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.21 Ship to Address

Use the Ship to Address page to search for and select a ship-to address or begin creating a new ship-to address.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–20 Ship to Address Page Reference

UI Object Name	Type	Description/Usage
Country	Pull-down menu	Use this to select the country of the ship-to address for which you are searching. Leave blank to search for addresses in all countries.
Search	Button	Click to search for a ship-to address.
Create Address	Button	Click to create a new ship-to address in the Create Address page.
Address Search Results	Section	Displays ship-to addresses that match your search criteria.
Select	Radio button	Highlight to select a ship-to address.
Customer	Column	Displays the name of the ship-to customer with the address.
Contact	Column	Displays the name of the ship-to contact with the address.
Address	Column	Displays the ship-to address.
Primary	Column	Displays whether the address is the primary one of the given address type for the customer. The primary addresses have a checkmark in this column.
Type	Column	Displays the type of the address, e.g., Main, Ship-to, Bill-to, Mailing.
Continue	Button	Click to save the selected ship-to address and view the updated Shipping Information - Header Level page.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of search results.

Table A–20 Ship to Address Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.13.1, "Shipping Details"

Section A.1.6, "Page Flow for Changing Shipping Information"

A.22 Payment and Billing Information

Use the Payment and Billing Information page to enter payment and billing information for the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–21 Payment and Billing Information Page Reference

UI Object Name	Type	Description/Usage
Sold to Customer	Section	Displays information about the sold-to customer.
Name	Read-only field	Displays the sold-to customer's name.
Payment Information	Section	Enter payment information here.
Purchase Order	Radio button/ Text field	Highlight if the customer is placing a purchase order, and enter the purchase order number in the text field.
Invoice	Radio button	Highlight if the customer should receive an invoice.

Table A–21 Payment and Billing Information Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Existing Credit Card	Radio button/ Pull-down menu	Highlight if the customer is paying with a credit card that you have entered for this order, and select the credit card from the pull-down menu.
New Credit Card	Radio button	Highlight if the customer is paying with a credit card that you have not entered for this order.
Card Holder Name	Text field	Enter the name of the credit card holder.
Type	Pull-down menu	Use to select the new credit card type.
Number	Text field	Enter the new credit card number.
Expiry Date	Pull-down menus	Use the left pull-down menu to select the month that the new credit card expires. Use the right pull-down menu to select the year that the new credit card expires.
I will fax my credit card	Radio button	Highlight if the customer is faxing the credit card information instead of submitting it to you to enter directly in the quote.
Cash	Radio button	Highlight if the customer is paying with cash.
Bill to Customer	Section	Displays information about the bill-to customer.
Name	Read-only field	Displays the bill-to customer's name.
Change	Button	Click to change the bill-to customer in the Bill to Customer page.
Bill to Contact	Section	Displays information about the bill-to contact.
Name	Read-only field	Displays the bill-to contact's name.
Phone	Read-only field	Displays the bill-to contact's phone number.
Email	Read-only field	Displays the bill-to contact's e-mail address.
Change	Button	Click to change the bill-to contact in the Bill to Contact page.
Bill to Address	Section/ Read-only field	Displays information about the bill-to address.
Change	Button	Click to change the bill-to address in the Bill to Address page.

Table A–21 Payment and Billing Information Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Additional Information	Section	Displays additional information about the order.
Comment	Text	Enter comments about the quote or order.
Tax Information	Section	Enter the customer's tax information here.
Yes	Radio button	Highlight if the order is taxable.
No	Radio button	Highlight if the order is not taxable.
Reason Code	Pull-down menu	If the order is not taxable, select the reason for the tax exemption here.
Tax Certification Number	Text field	If the order is not taxable, enter the customer's tax certificate number.
Continue	Button	Click to save the payment and billing information and go to the Review Order Details and Confirm page.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.14, "Billing Details"

Section A.1.5, "Page Flow for Submitting Quotes as Orders"

Section A.1.7, "Page Flow for Changing Billing Information"

A.23 Bill to Customer (1)

Use the Bill to Customer (1) page to search for a bill-to customer.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–22 Bill to Customer (1) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the bill-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the bill-to customer’s party type.
Customer Account Number	Text field	Enter the bill-to customer’s account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country for the bill-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a bill-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new bill-to customer in the Create Customer page.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.14, "Billing Details"

Section A.1.7, "Page Flow for Changing Billing Information"

A.24 Bill to Customer (2)

Use the Bill to Customer (2) page to search for and select a bill-to customer or begin creating a new bill-to customer.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–23 Bill to Customer (2) Page Reference

UI Object Name	Type	Description/Usage
Search a Customer Name	Text field	Enter the bill-to customer name for which you want to search. Use % as a lagging wildcard character if necessary.
Organization/Person	Radio buttons	Highlight the button that corresponds to the bill-to customer's party type.
Customer Account Number	Text field	Enter the bill-to customer's account number for which you want to search. Use % as a lagging wildcard character if necessary.
Country	Pull-down menu	Use this to choose the country for the bill-to customer for which you want to search. Leave blank to search all countries.
Search	Button	Click to search for a bill-to customer with the criteria that you have specified.
Create Customer	Button	Click to create a new bill-to customer in the Create Customer page.
Customer Search Results	Section	Displays the results of your search for a bill-to customer.
Select	Radio button	Highlight to select a bill-to customer.
Customer Name	Column	Displays the customer's name.
Account Number	Column	Displays the customer's account number.
Address	Column	Displays the customer's address.
Primary	Column	Displays whether the address is the primary one of the given address type for the customer. The primary addresses have a checkmark in this column.
Type	Column	Displays the type of the address, e.g., Main, Ship-to, Bill-to, Mailing, and so on.

Table A–23 Bill to Customer (2) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Continue	Button	Click to save the selected bill-to customer and view the updated Payment and Billing Information page.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.14, "Billing Details"

Section A.1.7, "Page Flow for Changing Billing Information"

A.25 Bill to Contact

Use the Bill to Contact page to search for and select a bill-to contact or begin creating a new bill-to contact.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–24 Bill to Contact Page Reference

UI Object Name	Type	Description/Usage
Search a Contact Name	Text field	Enter the bill-to contact name for which you want to search. Use % as a lagging wildcard character if necessary.
Search	Button	Click to search for a bill-to contact with the criteria that you have specified.
Create Contact	Button	Click to create a new bill-to contact in the Create Contact page.
Contact Search Results for: <Organization Name>	Section	Displays the bill-to contacts for the customer organization named here that match your search criteria.
Select	Radio button	Highlight to select a bill-to contact.
Contact	Column	Displays the contact's name.
Primary Phone	Column	Displays the contact's primary phone number.
Email	Column	Displays the contact's e-mail address.
Continue	Button	Click to save the selected bill-to contact and view the updated Payment and Billing Information page.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of your search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.14, "Billing Details"

Section A.1.7, "Page Flow for Changing Billing Information"

A.26 Bill to Address

Use the Bill to Address page to search for and select a bill-to address or begin creating a new bill-to address.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–25 Bill to Address Page Reference

UI Object Name	Type	Description/Usage
Country	Pull-down menu	Use this to select the country of the bill-to address for which you are searching. Leave blank to search for addresses in all countries.
Search	Button	Click to search for a bill-to address.
Create Address	Button	Click to create a new bill-to address in the Create Address page.
Address Search Results	Section	Displays bill-to addresses that match your search criteria.
Select	Radio button	Highlight to select a bill-to address.
Customer	Column	Displays the name of the bill-to customer with the address.
Contact	Column	Displays the name of the bill-to contact with the address.
Address	Column	Displays the bill-to address.
Primary	Column	Displays whether the address is the primary one of the given address type for the customer. The primary addresses have a checkmark in this column.
Type	Column	Displays the type of the address, e.g., Main, Ship-to, Bill-to, Mailing.

Table A–25 Bill to Address Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Continue	Button	Click to save the selected bill-to address and view the updated Payment and Billing Information page.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

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

Section 2.13, "Converting Quotes into Orders"

Section 2.14, "Billing Details"

Section A.1.7, "Page Flow for Changing Billing Information"

A.27 Review Order Details and Confirm

Use the Review Order Details and Confirm page to review item details, shipping information, and billing information, and to place the order.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–26 Review Order Details and Confirm Page Reference

UI Object Name	Type	Description/Usage
Process Quote	Button	Click to place the quote as an order.
Part Number	Column	Displays the line item's part number.
Product	Column	Displays the line item's product name.
UOM	Column	Displays the line item's unit of measure.
Number of Units	Text field	Displays the quantity of the line item. Enter a different number in the field and click **Update** to change the quantity.
Unit Price	Column	Displays the line item's unit price.
Adjustment	Hyperlink	Displays the price adjustment, if any, for the line item. Click to view the adjustment details.
Total Price	Column	Displays the line item's total price.
Line Level Shipping	Column	Displays the Details buttons.
Details	Button	Click to view the line item's shipping information.
Update	Button	Click to save your changes.
Sub-Total	Read-only field	Displays the quote's sub-total.
Shipping and Handling	Read-only field	Displays the shipping and handling charges for the quote.
Location	Read-only field	Displays the Tax Code Display Name from Oracle Receivables.
Total	Read-only field	Displays the quote's total price.
Shipping Information	Section	Displays the quote's shipping information.
Click here to change Shipping Information	Hyperlink	Click to change shipping information.

Table A–26 Review Order Details and Confirm Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Shipping Method	Read-only field	Displays the header-level shipping method.
Ship to Customer	Read-only field	Displays the header-level ship-to customer.
Shipping Address	Read-only field	Displays the header-level ship-to address.
Ship to Contact	Read-only field	Displays the ship-to contact's name, phone number, and e-mail address.
Requested Delivery Date	Read-only field	Displays the header-level requested delivery date.
Shipping Instructions	Read-only field	Displays the header-level shipping instructions.
Packing Instructions	Read-only field	Displays the header-level packing instructions.
Payment and Billing Information	Section	Displays the quote's payment and billing information.
Click here to change Billing Information	Hyperlink	Click to change billing information.
Payment Type	Read-only field	Displays how the bill-to customer will pay for the order.
Bill to Customer	Read-only field	Displays the bill-to customer.
Billing Address	Read-only field	Displays the bill-to address.
Bill to Contact	Read-only field	Displays the bill-to contact's name, phone number, and e-mail address.

See Also

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

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

Section 2.13, "Converting Quotes into Orders"

Section 2.14.1, "Placing Orders"

Section A.1.5, "Page Flow for Submitting Quotes as Orders"

A.28 Create Customer

Use the Create Customer page to create a new sold-to, ship-to, or bill-to customer.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–27 Create Customer Page Reference

UI Object Name	Type	Description/Usage
Organization	Radio button/Text field	Highlight this if you are creating a customer that is an organization, and enter the customer name in the text field.
Person	Radio button	Highlight this if you are creating a customer who is a person.
Last Name	Text field	Enter the customer's last name if the customer is a person.
First Name	Text field	Enter the customer's first name if the customer is a person.
MI	Text field	Enter the customer's middle initial if the customer is a person.
Email	Text field	Enter the customer's e-mail address if the customer is a person.
Phone Number	Text fields	Enter the customer's phone number.
Customer Address	Section	Displays the customer's address details.
Country	Pull-down menu	Use this to select the customer's country.
Address Name	Text field	Enter the name of the customer's address: Home, Office, or another name.
Address	Text fields	Enter the customer's sold-to address if you initially clicked the **Create Customer** button in the Create Quote or Copy Quote pages. Enter the customer's ship-to address if you clicked the **Create Customer** button in the Ship to Customer page. Enter the customer's bill-to address if you clicked the **Create Customer** button in the Bill to Customer page.
City	Text field	Enter the customer's city.
County	Text field	Enter the customer's county.

Table A–27 Create Customer Page Reference (Cont.)

UI Object Name	Type	Description/Usage
State	Text field	Enter the customer's state.
Zip	Text field	Enter the customer's zip code.
Country	Read-only field	Displays the customer's country.
Create	Button	Click to save the customer information that you have entered on this page. If you are creating a quote, the Create Quote page that requests the quote name and expiration date opens. If you are copying a quote, the Copy Quote page with the Copy From: and Copy To: sections opens. If you are entering shipping information at the header level, the Shipping Information - Header Level page opens with the newly created customer's information entered. If you are entering shipping information at the line level, the Shipping Information page opens with the newly created customer's information entered. If you are entering billing information, the Payment and Billing Information page opens with the newly created customer's information entered.
Clear	Button	Click to clear the fields on the page without saving your changes.

See Also

Section 1.4.2, "Process Flow for Creating a Quote"

Section 1.4.4, "Process Flow for Copying a Quote"

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

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

Section 2.15, "Creating Customers"

Section A.1.2, "Page Flow for Creating Quotes"

Section A.1.3, "Page Flow for Copying Quotes"

Section A.1.6, "Page Flow for Changing Shipping Information"

Section A.1.7, "Page Flow for Changing Billing Information"

A.29 Create Contact

Use the Create Contact page to create a new ship-to or bill-to contact.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–28 Create Contact Page Reference

UI Object Name	Type	Description/Usage
Customer Name	Read-only field	Displays the name of the customer for which you are creating a contact.
First Name	Text field	Enter the contact's first name.
MI	Text field	Enter the contact's middle initial.
Last Name	Text field	Enter the contact's last name.
Email	Text field	Enter the contact's e-mail address.
Day Phone	Text fields	Enter the contact's daytime phone number.
Evening Phone	Text fields	Enter the contact's evening phone number.
Fax Number	Text fields	Enter the contact's fax number.
Contact Address (optional)	Section	Displays the contact's address details.
Country	Pull-down menu	Use this to select the contact's country.
Address Name	Text field	Enter the name of the contact's address: Home, Office, or another name.
Address	Text fields	Enter the contact's ship-to address if you initially clicked the **Create Contact** button in the Ship to Contact page. Enter the contact's bill-to address if you clicked the **Create Contact** button in the Bill to Contact page.
City	Text field	Enter the contact's city.
County	Text field	Enter the contact's county.

Table A–28 Create Contact Page Reference (Cont.)

UI Object Name	Type	Description/Usage
State	Text field	Enter the contact's state.
Zip	Text field	Enter the contact's zip code.
Country	Read-only field	Displays the contact's country.
Create	Button	Click to save the contact information that you have entered on this page. If you are entering shipping information at the header level, the Shipping Information - Header Level page opens with the newly created contact's information entered. If you are entering shipping information at the line level, the Shipping Information page opens with the newly created contact's information entered. If you are entering billing information, the Payment and Billing Information page opens with the newly created contact's information entered.
Clear	Button	Click to clear the fields on the page without saving your changes.

See Also

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

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

Section 2.14.2, "Creating Contacts"

Section A.1.6, "Page Flow for Changing Shipping Information"

Section A.1.7, "Page Flow for Changing Billing Information"

A.30 Create Address

Use the Create Address page to create a new ship-to or bill-to address.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–29 Create Address Page Reference

UI Object Name	Type	Description/Usage
Customer Name/ Contact Name	Radio buttons	Highlight the radio button next to the Customer Name or Contact Name for which you are creating the address.
Country	Pull-down menu	Use this to select the address's country.
Address Name	Text field	Enter the name of the address that you are creating: Home, Office, or another name.
Address	Text fields	Enter a ship-to address if you initially clicked the **Create Address** button in the Ship to Address page. Enter a bill-to address if you clicked the **Create Address** button in the Bill to Address page.
City	Text field	Enter the address's city.
County	Text field	Enter the address's county.
State	Text field	Enter the address's state.
Zip	Text field	Enter the address's zip code.
Country	Read-only field	Displays the address's country.
Create	Button	Click to save the address information that you have entered on this page. If you are entering shipping information at the header level, the Shipping Information - Header Level page opens with the newly created address entered. If you are entering shipping information at the line level, the Shipping Information page opens with the newly created address entered. If you are entering billing information, the Payment and Billing Information page opens with the newly created address entered.

Table A–29 Create Address Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Clear	Button	Click to clear the fields on the page without saving your changes.

See Also

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

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

Section 2.14.3, "Creating Addresses"

Section A.1.6, "Page Flow for Changing Shipping Information"

Section A.1.7, "Page Flow for Changing Billing Information"

A.31 Quote Detail - Main

Use the Quote Detail - Main page to view quote details, create a new version of the quote, begin copying or appending the quote, and print the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–30 Quote Detail - Main Page Reference

UI Object Name	Type	Description/Usage
Main	Read-only sub-tab	Displays the sub-tab name of this page.
Items	Sub-tab	Click to view the Quote Detail - Items page.
Pricing Agreements	Sub-tab	Click to view the Quote Detail - Pricing Agreements page.
Promotion Codes	Sub-tab	Click to view the Quote Detail - Promotion Codes page.
Attachments	Sub-tab	Click to view the Quote Detail - Attachments page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.
Versions	Sub-tab	Click to view the Quote Detail - Versions page.

Table A–30 Quote Detail - Main Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Copy	Button	Click to copy this quote to a new quote.
Append	Button	Click to append this quote's line items to an existing quote.
Create New Version	Button	Click to create a new version of this quote.
Print Quote	Button	Click to view a printable layout of this quote.
Customer	Read-only field	Displays the sold-to customer.
Account	Read-only field	Displays the sold-to account.
Contact	Read-only field	Displays the sold-to contact.
Change Contact	Button	Click to change the contact for a quote.
Quote Name	Hyperlink	Displays the quote's name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote's number and version.
Opportunity	Read-only field	Displays the OSO opportunity, if any, from which this quote was created.
Expiration Date	Read-only field	Displays the expiration date of this quote.
Agreement	Read-only field	Displays the pricing agreement that is applied to this quote.
Status	Read-only field	Displays the quote's status.
Channel	Read-only field	Displays the OSO channel, if any, for this quote.
Assigned To	Read-only field	Displays the sales representative to whom this quote is assigned.
Created By	Read-only field	Displays the sales representative user name that created this quote.
Creation Date	Read-only field	Displays the date that this quote was created.
Modified By	Read-only field	Displays the sales representative user name that last modified this quote.
Last Modified Date	Read-only field	Displays the date that this quote was last modified.

See Also

Section 1.4.1, "Process Flow for Viewing and Searching for Quotes"

Section 2.4, "Viewing Quote Details"

Section 2.10.1, "Creating New Quote Versions"

Section 2.12, "Printing Quotes"

Section A.1.8, "Page Flow for the Quote Detail - Main Sub-Tab"

A.32 Create New Version

Use the Create New Version page to view the quote name, quote number, and sold-to customer of the new quote version.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–31 Create New Version Page Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the new quote version's sold-to customer.
Quote Name	Read-only field	Displays the new quote version's name.
Quote Number	Read-only field	Displays the new quote version's number and version.
Continue	Button	Click to view the Quote Detail - Main page for the new quote version.

See Also

Section 2.10, "Creating and Viewing Quote Versions"

Section A.1.8, "Page Flow for the Quote Detail - Main Sub-Tab"

A.33 Quote Detail - Items

Use the Quote Detail - Items page to search for and add items to the quote, assign sales credits, check on availability of items, override prices manually, and process the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–32 Quote Detail - Items Page Reference

UI Object Name	Type	Description/Usage
Main	Sub-tab	Click to view the Quote Detail - Main page.
Items	Read-only sub-tab	Displays the sub-tab name of this page.
Pricing Agreements	Sub-tab	Click to view the Quote Detail - Pricing Agreements page.
Promotion Codes	Sub-tab	Click to view the Quote Detail - Promotion Codes page.
Attachments	Sub-tab	Click to view the Quote Detail - Attachments page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.
Versions	Sub-tab	Click to view the Quote Detail - Versions page.
Customer	Read-only field	Displays the quote's sold-to customer.
Quote Name	Hyperlink	Displays the quote's name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote's number and version.
Quick Search	Pull-down menu/ Text field	Use the pull-down menu to choose a product category, or **All Products.** Enter the search criteria in the text field, using % as a lagging wildcard character if necessary.
Go	Button	Click to search for a product using your Quick Search criteria.
Advanced Search	Hyperlink	Click to use the Advanced Search.
Update	Button	Click to save changes that you make in this page.

Table A–32 Quote Detail - Items Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Check Availability	Button	Click to check the availability of the line items in the Availability page.
Process Quote	Button	Click to begin the process of submitting the quote as an order in the Shipping Information - Header Level page.
Sales Credits	Button	Click to assign sales credits at the header level.
Remove	Checkbox	Check to remove a line item from the quote.
Line Type	Pull-down menu	Use to select the line type of an item: **Standard** for items that the customer is purchasing, and **Return** for trade-in items.
Part Number	Column	Displays the line item’s part number.
Product	Column	Displays the line item’s name.
Unit of Measure	Column	Displays the line item’s unit of measure.
Number of Units	Column/Text field	Displays the quantity of the item. If necessary, you can type another quantity in the text field.
Unit Price	Column	Displays the line item’s unit price.
Net Price Over-ride	Column/Text field	Enter a price override for the line item’s unit price.
Adjustment	Hyperlink	Displays the price adjustment for the line item. Click to view the details of the price adjustment.
Total Price	Column	Displays the total price of the line.
Total Price Over-ride	Column/Text field	Enter a price override for the line item’s total price.
Services	Column	Displays the Add Services button, if services are available for the product.
Sales Credits	Column	Displays the Assign buttons.
Assign	Button	Click to assign sales credits at the line level.
Sub-Total	Read-only field	Displays the quote’s sub-total.
Shipping	Read-only field	Displays the shipping charges for the quote.
Tax	Read-only field	Displays the tax for the quote.
Total	Read-only field	Displays the quote’s total price.

See Also

Section 1.4.3, "Process Flow for Modifying a Quote"

Section 2.5.2, "Adding Items to Quotes"

Section 2.6, "Adding Trade-In Items to Quotes"

Section 2.7, "Viewing Item Details in Quotes"

Section 2.7.1, "Overriding Item Prices"

Section A.1.9, "Page Flow for the Quote Detail - Items Sub-Tab"

A.34 Advanced Search

Use the Advanced Search page to execute the Advanced Search for a product.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–33 Advanced Search Page Reference

UI Object Name	Type	Description/Usage
Categories	Pull-down menu	Use to select a product category, or **All Products.**
Keyword(s)	Text field	Enter the keywords by which you want to search for a product.
Match all words (and)	Radio button	Highlight if you want the search to retrieve only the products that have all of your keywords.
Match any words (or)	Radio button	Highlight if you want the search to retrieve all products that contain at least one of your keywords.
Excluded Keyword(s)	Text field	Enter any keywords that specifically should not be associated with the products returned by the search.
Search	Button	Click to execute the Advanced Search and view your search results in the Quote Detail page.

See Also

Section 2.5.2, "Adding Items to Quotes"

Section 2.6, "Adding Trade-In Items to Quotes"

Section A.1.9, "Page Flow for the Quote Detail - Items Sub-Tab"

A.35 Quote Detail (Product Search Results)

Use the Quote Detail (Product Search Results) page to view your product search results, continue searching for a product, and select a product to add to the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–34 Quote Detail (Product Search Results) Page Reference

UI Object Name	Type	Description/Usage
Quick Search	Pull-down menu/ Text field	Use the pull-down menu to choose a product category, or **All Products.** Enter the search criteria in the text field, using % as a lagging wildcard character if necessary.
Go	Button	Click to search for a product using your Quick Search criteria.
Advanced Search	Hyperlink	Click to use the Advanced Search.
Product Search Results	Section	Displays the products that match your search criteria.
Add	Button	Click to add the selected product to the quote.
Cancel	Button	Click to cancel and return to the Quote Detail - Items page.
Select	Checkbox	Check the box to select a product to add to the quote. You can select and add multiple products at one time.
Part Number	Column	Displays the product's part number.
Product	Column	Displays the product's name.
Unit of Measure	Column	Displays the product's unit of measure.

See Also

Section 2.5.2, "Adding Items to Quotes"

Section 2.6, "Adding Trade-In Items to Quotes"

Section A.1.9, "Page Flow for the Quote Detail - Items Sub-Tab"

A.36 Quote Detail - Add Service

Use the Quote Details - Add Service to add a service to a serviceable item.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–35 Add Service Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote’s number and version.
Product	Read-only field	Displays the product to which the service is added.
Part Number	Read-only field	Displays the product number for the product to which the service is added.
Included Warranties	Section	Displays warranties included with the product.
Part Number	Column	Displays the product number of the warranty or warranties included with the serviceable product.
Service Item	Column	Displays the product name of the warranty included with the serviceable product.
Duration	Column	Displays the duration of the warranty included with the serviceable product.
Period	Column	Displays the period of the warranty included with the serviceable product.
Other Available Service	Section	Displays a list of service items that are available for the current product.
Add	Button	Click to add the selected service to the quote.
Cancel	Button	Click to cancel and return to the Quote Detail _ Items page.
Select	Checkbox	Check to select a service to add to the quote. You can select and add multiple services at one time.
Line Type	Drop-down menu	Select a line type for the service item. The item can be either a standard item or a return.

Table A–35 Add Service Reference

UI Object Name	Type	Description/Usage
Part Number	Column	Displays the part number of the service item.
Service Item	Column	Displays the name of the service item.
Start Date	Text field	Enter the starting date of the service item.
Calendar	Button	Click to use a date picker to enter a date in the Start Date text field.
Duration	Text field	Enter the duration of the service item.
Period	LOV field	Select the period for the service item.

See Also

Section 2.5.2, "Adding Items to Quotes"

Section 2.5.3, "Adding Service Items to Quotes"

A.37 Modify Service

Use the Modify Service page to modify the line type, start date, duration, and period information for a service item.

The following table summarizes the UI objects types, descriptions, and usage for this page.

Table A–36 Modify Service Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote’s number and version.
Product	Read-only field	Displays the product to which the service is added.
Part Number	Read-only field	Displays the product number for the product to which the service is added.
Included Warranties	Section	Displays warranties included with the product.

Table A–36 Modify Service Reference

UI Object Name	Type	Description/Usage
Part Number	Column	Displays the product number of the warranty or warranties included with the serviceable product.
Service Item	Column	Displays the product name of the warranty included with the serviceable product.
Duration	Column	Displays the duration of the warranty included with the serviceable product.
Period	Column	Displays the period of the warranty included with the serviceable product.
Selected Services	Section	Displays the services that you can modify.
Line Type	Drop-down menu	Select a line type for the service item. The item can be either a standard item or a return.
Part Number	Column	Displays the part number of the service item.
Service Item	Column	Displays the name of the service item.
Start Date	Text field	Enter the starting date of the service item.
Calendar	Button	Click to use a date picker to enter a date in the Start Date text field.
Duration	Text field	Enter the duration of the service item.
Period	LOV field	Select the period for the service item.
Update	Button	Click to apply your changes and return to the Quote Detail - Items page.
Restore	Button	Click to restore the original information, if you made changes.
Done	Button	Click to return to the Quote Detail - Items page. If you made changes and you click Done before clicking Update, your changes will not apply.

See Also

Section 2.5.2, "Adding Items to Quotes"

Section 2.5.3, "Adding Service Items to Quotes"

A.38 Add Service for Configuration

Use the Add Service for Configuration page to add service items to a configured item and its components.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–37 Add Service for Configuration Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the sold-to customer’s name.
Quote Name	Read-only field	Displays the quote’s name.
Quote Number	Read-only field	Displays the quote number and version.
Done	Button	Click to return to the Quote Detail - Main page.
Part Number	Column heading	Displays the part number for the component.
Component	Column heading	Displays the component name.
Unit of Measure	Column heading	Displays the UOM for the component.
Quantity	Column heading	Displays the selected quantity of the component.
Services	Column heading	An Add button displays in this column if there are services available for the component.
Add	Button	Click to add services to the configured product.

See Also

Section 2.5.2, "Adding Items to Quotes"

Section 2.5.3.1, "Adding a Service for a Configurable Item"

A.39 Quote Detail (Sales Credits)

Use the Quote Detail (Sales Credits) page to assign sales credits at the quote header level or at a line item’s level.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–38 Quote Detail (Sales Credits) Page Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the sold-to customer’s name.
Quote Name	Read-only field	Displays the quote’s name.
Quote Number	Read-only field	Displays the quote number and version.
Sales Credits	Section	Review and allocate sales credits here.
Reference	Read-only field	Displays the line item’s part number and product name if you are allocating line-level sales credits.
Revenue Classification	Subsection	Review and allocate revenue sales credits here.
Search	Pull-down menu/ Text field	Select the category of the sales representative to whom you want to allocate sales credits, such as **Employee, Partner, or Party,** and enter the representative’s name in the text field. You can use % as a lagging wildcard character.
Go	Button	Click to search for sales representatives using the criteria you have specified.
Remove	Checkbox	Check this to remove a sales representative from the sales credit allocation list.
Category	Column	Displays the sales representative’s category.
Sales Group	Column	Displays the sales representative’s sales group.
Name	Column	Displays the sales representative’s name.
Credit Type	Pull-down menu	Use this to select a revenue credit type.
Credit Percent	Text field	Enter the percent of revenue credits for the header level or line level that the sales representative should receive. The total of the numbers in all Credit Percent fields for revenue classification should be 100.
Update	Button	Click to save your changes.

Table A–38 Quote Detail (Sales Credits) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Restore	Button	Click to revert to your last-saved changes.
Done	Button	Click to return to the Quote Detail - Items page. If you make changes and click Done without clicking Update first, the changes will not apply.
Non-Revenue Classification	Subsection	Review and allocate revenue sales credits here.
Search	Pull-down menu/ Text field	Select the category of the sales representative to whom you want to allocate sales credits, such as **Employee, Partner, or Party,** and enter the representative’s name in the text field. You can use % as a lagging wildcard character.
Go	Button	Click to search for sales representatives using the criteria you have specified.
Remove	Checkbox	Check this to remove a sales representative from the sales credit allocation list.
Category	Column	Displays the sales representative’s category.
Sales Group	Column	Displays the sales representative’s sales group.
Name	Column	Displays the sales representative’s name.
Credit Type	Pull-down menu	Use this to select a non-revenue credit type.
Credit Percent	Text field	Enter the percent of non-revenue credits for the header level or line level that the sales representative should receive.
Update	Button	Click to save your changes.
Restore	Button	Click to revert to your last-saved changes.
Done	Button	Click to return to the Quote Detail - Items page. If you make changes and click Done without clicking Update first, the changes will not apply.

See Also

Section 2.7.2, "Allocating Sales Credits"

Section A.1.9, "Page Flow for the Quote Detail - Items Sub-Tab"

A.40 Add Resource

Use the Add Resource page to search for and select sales representatives to whom you want to allocate sales credits.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–39 Add Resource Page Reference

UI Object Name	Type	Description/Usage
Search	Pull-down menu/ Text field	Select the category of the sales representative to whom you want to allocate sales credits, such as **Employee, Partner, or Party,** and enter the representative's name in the text field. You can use % as a lagging wildcard character.
Go	Button	Click to search for sales representatives using the criteria you have specified.
Resource Search Results	Section	Displays the results of your search for a sales representative.
Add	Button	Click to add the selected sales representative to the sales credit allocation list.
Cancel	Button	Click to cancel and return to the Sales Credit page.
Select	Radio button	Highlight to select a sales representative to add to the sales credit allocation list.
Category	Column	Displays the sales representative's category.
Sales Group	Column	Displays the sales representative's sales group.
Name	Column	Displays the sales representative's name.
First	Hyperlink	Click to go to the first page of your search results.
Previous	Hyperlink	Click to go to the previous page of your search results.
Next	Hyperlink	Click to go to the next page of your search results.
Last	Hyperlink	Click to go to the last page of your search results.

See Also

Section 2.7.2, "Allocating Sales Credits"

Section A.1.9, "Page Flow for the Quote Detail - Items Sub-Tab"

A.41 Availability

Use the Availability page to check on availability of products in your quote by the date that they are needed.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–40 Availability Page Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the sold-to customer’s name.
Quote Name	Read-only field	Displays the quote’s name.
Quote Number	Read-only field	Displays the quote number and version.
Product Name & Part Number	Column	Displays the product name and part number for each line item.
Quantity	Column	Displays the number of units of each line item.
Unit of Measure	Column	Displays the unit of measure of each line item.
Need By	Text field	Displays the date by which the line item is needed. Enter another date in the text field to search for availability by a different date, in DD-MON-YYYY format.
Calendar	Button	Click to use a date picker to enter a date in the Need By text field.
Availability Information	Column	Displays availability information for each line item.
Check Availability	Button	Click to check availability of the quote’s line items by the dates in the Need By text fields.
Done	Button	Click to return to the Quote Detail - Items page.

See Also

Section 2.5.2, "Adding Items to Quotes"

Section A.1.9, "Page Flow for the Quote Detail - Items Sub-Tab"

A.42 Quote Detail - Pricing Agreements

Use the Quote Detail - Pricing Agreements page to apply a pricing agreement to the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–41 Quote Detail - Pricing Agreements Page Reference

UI Object Name	Type	Description/Usage
Main	Sub-tab	Click to view the Quote Detail - Main page.
Items	Sub-tab	Click to view the Quote Detail - Items page.
Pricing Agreements	Read-only sub-tab	Displays the sub-tab name of this page.
Promotion Codes	Sub-tab	Click to view the Quote Detail - Promotion Codes page.
Attachments	Sub-tab	Click to view the Quote Detail - Attachments page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.
Versions	Sub-tab	Click to view the Quote Detail - Versions page.
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote’s number and version.
Select	Radio button	Highlight to select a pricing agreement to apply to the quote.
Agreement	Column	Displays applicable pricing agreements for this quote.
Price List	Column	Displays the price lists associated with the pricing agreements.

See Also

Section 1.4.3, "Process Flow for Modifying a Quote"

Section 2.7.3, "Applying Pricing Agreements"

Section A.1.10, "Page Flow for the Quote Detail - Pricing Agreements Sub-Tab"

A.43 Quote Detail - Promotion Codes (1)

Use the Quote Detail - Promotion Codes (1) page to add or remove promotion codes for the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–42 Quote Detail - Promotion Codes (1) Page Reference

UI Object Name	Type	Description/Usage
Main	Sub-tab	Click to view the Quote Detail - Main page.
Items	Sub-tab	Click to view the Quote Detail - Items page.
Pricing Agreements	Sub-tab	Click to view the Quote Detail - Pricing Agreements page.
Promotion Codes	Read-only sub-tab	Displays the sub-tab name of this page.
Attachments	Sub-tab	Click to view the Quote Detail - Attachments page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.
Versions	Sub-tab	Click to view the Quote Detail - Versions page.
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote’s number and version.
Add Rows	Button	Click to add more text fields in which you can enter promotion codes.
Done	Button	Click when you have finished adding or removing promotion codes, to save your changes.
Remove	Checkbox	Check to remove a promotion code from the quote.
Promotion Code	Read-only text field/Text field	Displays a promotion code as a read-only field if it has been added to the quote. You can enter more promotion codes in the text fields. Enter only one promotion code per text field.

Table A–42 Quote Detail - Promotion Codes (1) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Name	Column	Displays the names of the promotion codes that have been added to the quote.

See Also

Section 1.4.3, "Process Flow for Modifying a Quote"

Section 2.7.4, "Applying Promotion Codes"

Section A.1.11, "Page Flow for the Quote Detail - Promotion Codes Sub-Tab"

A.44 Quote Detail - Promotion Codes (2)

Use the Quote Detail - Promotion Codes (2) page to view the search results of the promotion code search that you designated in the Quote Detail - Promotion Codes (1) page.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–43 Quote Detail - Promotion Codes (2) Page Reference

UI Object Name	Type	Description/Usage
Main	Sub-tab	Click to view the Quote Detail - Main page.
Items	Sub-tab	Click to view the Quote Detail - Items page.
Pricing Agreements	Sub-tab	Click to view the Quote Detail - Pricing Agreements page.
Promotion Codes	Read-only sub-tab	Displays the sub-tab name of this page.
Attachments	Sub-tab	Click to view the Quote Detail - Attachments page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.
Versions	Sub-tab	Click to view the Quote Detail - Versions page.
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.

Table A–43 Quote Detail - Promotion Codes (2) Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Quote Number	Read-only field	Displays the quote's number and version.
Continue	Button	Click to return to the updated Quote Detail - Promotion Codes page where you can further add or remove promotion codes.
Promotion Code	Read-only field/ Text field	Displays a promotion code as a read-only field if it has been added to the quote.
Name	Column	Displays the names of the promotion codes that have been added to the quote.

See Also

Section 1.4.3, "Process Flow for Modifying a Quote"

Section 2.7.4, "Applying Promotion Codes"

Section A.1.11, "Page Flow for the Quote Detail - Promotion Codes Sub-Tab"

A.45 Quote Detail - Attachments

Use the Quote Detail - Attachments page to remove or begin attaching files to the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–44 Quote Detail - Attachments Page Reference

UI Object Name	Type	Description/Usage
Main	Sub-tab	Click to view the Quote Detail - Main page.
Items	Sub-tab	Click to view the Quote Detail - Items page.
Pricing Agreements	Sub-tab	Click to view the Quote Detail - Pricing Agreements page.
Promotion Codes	Sub-tab	Click to view the Quote Detail - Promotion Codes page.
Attachments	Read-only sub-tab	Displays the sub-tab name of this page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.

Table A–44 Quote Detail - Attachments Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Versions	Sub-tab	Click to view the Quote Detail - Versions page.
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote’s number and version.
Update	Button	Click to save your changes in this page.
Restore	Button	Click to revert to the original data that existed prior to making unsaved changes.
Add	Button	Click to select a file to attach to the quote.
Remove	Checkbox	Check to remove an attachment from the quote.
Attachment	Hyperlink	Displays the file name of the attachment. Click to open the file.
Date Added	Column	Displays the date when the file was attached to the quote.
Description	Column	Displays the file description that the sales representative entered when attaching the file to the quote.

See Also

Section 1.4.3, "Process Flow for Modifying a Quote"

Section 2.7.5, "Including Attachments in Quotes"

Section A.1.12, "Page Flow for the Quote Detail - Attachments Sub-Tab"

A.46 Add Attachment

Use the Add Attachment page to select a file to attach to the quote.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–45 Add Attachment Page Reference

UI Object Name	Type	Description/Usage
Customer	Read-only field	Displays the quote’s sold-to customer.
Quote Name	Hyperlink	Displays the quote’s name. Click to view the Quote Detail - Items page for the quote.
Quote Number	Read-only field	Displays the quote’s number and version.
File	Text field	Enter the directory path for the file that you want to attach to the quote. Alternatively, click the **Browse...** button.
Browse...	Button	Click to search for and select the file.
Description	Text field	Enter a description of this file.
Add	Button	Click to attach the file to the quote and view the updated Quote Detail - Attachments page.
Clear	Button	Click to clear the fields on the page without saving your changes.
Cancel	Button	Click to cancel and return to the Quote Detail - Attachments page.

See Also

Section 2.7.5, "Including Attachments in Quotes"

Section A.1.12, "Page Flow for the Quote Detail - Attachments Sub-Tab"

A.47 Quote Detail - Versions

Use the Quote Detail - Versions page to view all other versions of the quote, inactivate the quote, begin copying or appending a quote version, navigate to details for a quote version, and view the order details of a quote version with an Ordered status.

The following table summarizes the UI objects, types, descriptions, and usage for this page.

Table A–46 Quote Detail - Versions Page Reference

UI Object Name	Type	Description/Usage
Main	Sub-tab	Click to view the Quote Detail - Main page.
Items	Sub-tab	Click to view the Quote Detail - Items page.
Pricing Agreements	Sub-tab	Click to view the Quote Detail - Pricing Agreements page.
Promotion Codes	Sub-tab	Click to view the Quote Detail - Promotion Codes page.
Attachments	Sub-tab	Click to view the Quote Detail - Attachments page.
Notes	Sub-tab	Click to view the Quote Detail - Notes page.
Tasks	Sub-tab	Click to view the Quote Detail - Tasks page.
Versions	Read-only sub-tab	Displays the sub-tab name of this page.
Customer	Read-only field	Displays the sold-to customer’s name.
Quote Name	Read-only field	Displays the quote’s name.
Quote Number	Read-only field	Displays the quote number and version.
Copy	Button	Click to copy the selected quote version to a new quote.
Append	Button	Click to append the selected quote version to an existing quote.
Inactivate All	Button	Click to inactivate all versions of this quote.
Select	Radio button	Highlight to select a quote version.
Version	Hyperlink	Displays the version number. Click to view the Quote Detail - Items page of the quote version.

Table A–46 Quote Detail - Versions Page Reference (Cont.)

UI Object Name	Type	Description/Usage
Last Modified Date	Column	Displays the date that the quote version was last modified.
Creation Date	Column	Displays the date that the quote version was created.
Status	Column	Displays the quote version's status.
Total Amount	Column	Displays the quote version's total amount.
Order Detail	Hyperlink	Displays the order number for a quote version that has been placed as an order. Click to view the order's status in Order Tracker.
First	Hyperlink	Click to go to the first page of the version list.
Previous	Hyperlink	Click to go to the previous page of the version list.
Next	Hyperlink	Click to go to the next page of the version list.
Last	Hyperlink	Click to go to the last page of the version list.

See Also

Section 2.10.2, "Viewing Quote Versions"

Section A.1.13, "Page Flow for the Quote Detail - Versions Sub-Tab"

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.

Invoice

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

Launch phase

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

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

Ordered

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

OSO

Acronym for Oracle Sales Online.

Payments

Payments made by a customer against invoices.

Product item/Product

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

Product Search

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

Quote

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

Quote status

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

Sales Representative Role

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

Secure Electronic Transaction

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

Settling transactions

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

Transactional data

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

Up-sell

Up-sells aim to persuade customers to buy more expensive types of the same product.

VAD/Partner

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

Wildcard

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

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