

Oracle® Quoting

Implementation Guide

Release 11*i*

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Oracle Quoting Implementation Guide, Release 11i

Part No. B10590-02

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Send Us Your Comments

Oracle Quoting Implementation Guide, Release 11i

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

- Did you find any errors?
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Preface

Audience for This Guide

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

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

- The principles and customary practices of your business area.
- Oracle Quoting
- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

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

- Chapter 1 provides an overview of the Oracle Quoting application and its components, and lists features and functionality new in this release.
- Chapter 2 lists the mandatory and conditional dependencies of Oracle Quoting.
- Chapter 3 provides an overview of the implementation process.
- Chapter 4 lists the specific tasks involved in the implementation of Oracle Quoting.
- Chapter 5 contains a list of tasks for verifying the implementation.

- Chapter 6 contains FAQs and troubleshooting tips.
- Chapter 7 provides information on integrating Oracle Quoting with Oracle Approvals Management.
- Chapter 8 provides information on integrating Oracle Quoting with Oracle Contracts Core.
- Appendix A contains a complete list of Oracle Quoting’s profile options.
- Appendix B contains a complete list of Oracle Quoting’s seeded lookup types.
- Appendix C contains scenarios for new security functionality.
- Appendix D contains a list of the seeded Oracle Approvals Management attributes necessary for using Approvals functionality in Oracle Quoting.
- Appendix E contains a list of Oracle Quoting’s seeded caches.

Typographic Conventions

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

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

Documentation Accessibility

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

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Other Information Sources

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

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

Online Documentation

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

Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Quoting User Guide

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

Implementing Oracle CRM: ERP Functional Checklist

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

Oracle Pricing User's Guide

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

Oracle Bill of Materials User's Guide

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

Oracle General Ledger User Guide

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

Oracle Inventory User's Guide

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

Oracle Order Management Suite Implementation Manual

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

Oracle Receivables User's Guide

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

Oracle Approvals Management Implementation Guide

This document provides setup information for Oracle Approvals Management (OAM). Oracle Quoting integrates with OAM to provide approvals functionality during the quoting process.

Oracle Contracts Core Concepts and Procedures

This manual provides information on the profiles needed to integrate Oracle Quoting with Oracle Contracts for Sales.

Oracle Contracts for Sales Concepts and Procedures

This manual provides set up information for Oracle Contracts for Sales, which integrates with Oracle Quoting to provide Contracts functionality.

Oracle Sales Online Implementation Guide

This guide provides setup information for Oracle Sales Online. Oracle Quoting - HTML integrates with Oracle Sales Online to complete the opportunity-to-order workflow.

Oracle TeleSales Implementation Guide

This guide provides setup information for Oracle TeleSales. Oracle Quoting - Forms integrates with Oracle TeleSales to complete the opportunity-to-order workflow.

Oracle Workflow Guide

This guide provides the user with information about notifications, which Oracle Quoting uses during the approvals and contract request processes.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle 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 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 Oracle*8i* server, and your hardware and software environment.

Oracle*MetaLink*

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

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

Part I

Getting Started

This section of the Oracle Quoting Implementation Guide contains the following chapters:

- [Chapter 1, "Introduction"](#)
- [Chapter 2, "Before You Begin"](#)

Introduction

This chapter provides information on the following topics:

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

1.1 Oracle Quoting Overview

Oracle Quoting enables simple, secure creation and management of customer quotes across all sales and interaction channels. Organizations can propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle.

Oracle Quoting users can create quotes using modifiable templates, add and configure complex products, and perform real-time global availability checks. Users can accept product trade-ins, assign sales credits, and manually adjust prices. Quoting integration with Contracts allows users to negotiate a quote with a sales contract. Complex customer approval chains are supported and users can view and change customers' existing installation information, publish and print quotes, and eventually convert quotes to orders.

Oracle Quoting is available with an HTML and a Forms user interface. Oracle Quoting-HTML is integrated with Oracle Sales Online and Oracle Quoting-Forms with Oracle TeleSales.

1.1.1 Oracle Quoting Features

Oracle Quoting allows you to:

- Add configured products to quote (including guided selling)
- Add service products to quote
- Save/personalize searches (HTML only) and use advanced search capabilities
- Allocate sales credits
- Initiate approvals, using the Oracle Approvals engine, with out-of-the-box notifications
- Check availability of products
- Convert quotes to orders
- Copy existing quotes
- Create notes, tasks (HTML only), and attachments
- Create quote from opportunity
- Create quotes from templates (HTML only)
- Allow terms and conditions to be displayed with and printed on the quote through enhanced integration with Oracle Contracts

- Print quotes in PDF and RTF formats with enhanced printing
- Enforce key business practices in the sales cycle with enhanced quote status and transition model
- Control quote access and update with quote security
- Restrict salesperson's quote creation ability to specific customers
- Search Customer Install Base for Trade-Ins (HTML only)
- Search customer Install Base and Pending Orders for products to which you can apply services
- Share quotes with customers via the Oracle iStore web storefront
- Split-ship products
- Support flexible pricing within a quote including manual price overrides
- Authorize credit card payment

1.2 New in this Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

The following functionality is new in this release:

- Customer Credit Checking
- Oracle 8i interMedia-based Product Search
- Quoting to Prospects
- Quote Pricing and Tax Calculation on Request
- Quote and Template Line Copying
- Defaulting of Shipping and Billing Information
- Terms Substitution
- Compliance with Latin American Tax Requirements
- Improved Configuration and Display
- Enhanced Line Numbering

- Account Description Display
- Solution-Based Modeling

HTML UI Only

- Selectable Columns
- Oracle Proposals Integration
- Base UOM Modification
- Streamlined Quote Creation Flow
- Line-Level Charge Displaying

Forms UI Only

- Enhanced User Interface
- Basic and Advanced Quote Searches
- Improved Customer Search

Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Quoting. Topics include:

- [Related Documentation](#)
- [Installation Verification](#)
- [Oracle Quoting Dependencies](#)
- [Mandatory Dependencies](#)
- [Conditional Dependencies](#)
- [Dependency Verification](#)

2.1 Related Documentation

Oracle Quoting User Guide

Oracle Order Capture Foundation API Reference Manual

Oracle Quoting API Reference Guide

2.2 Installation Verification

Before proceeding with implementation of Oracle Quoting and its dependencies, you must verify that you have installed Oracle Applications correctly. See *Installing Oracle Applications* for more information.

2.3 Oracle Quoting Dependencies

Oracle Quoting depends on other Oracle modules and applications to provide additional functionality. Mandatory dependencies are required for Oracle Quoting to function properly. Conditional dependencies, when integrated, provide additional capabilities.

2.4 Mandatory Dependencies

Oracle Quoting requires that the following applications be installed and implemented.

- **Oracle Receivables** — Provides tax information and customer account information. Refer to the *Oracle Receivables User Guide* for complete setup information.
- **Oracle Advanced Pricing** — Allows set up of price lists, discounts, adjustments, and promotions. Refer to the *Oracle Advanced Pricing User's Guide* for complete setup information.
- **Oracle Bill of Materials** — Contains information about the components associated with a product. Refer to the *Bill of Materials User's Guide* for complete setup information.
- **Oracle General Ledger** — Enables set up of ledgers and books and store exchange rates. Refer to the *Oracle General Ledger User Guide* for complete setup information.

- **Oracle Inventory** — Provides Availability to Promise (ATP) and reservation functions, and all product information from Inventory. Refer to the *Oracle Inventory User's Guide* for complete setup information.
- **Oracle Order Management** — Allows creation of orders from quotes. Refer to the *Oracle Order Management Suite Implementation Manual* for complete setup information.

2.4.1 Setting up Oracle Receivables

Oracle Quoting uses Oracle Receivables to store customer information and access tax information. Customer information is stored in the Trading Community Architecture (TCA) schema.

2.4.2 Setting up Address Locations

You can set up valid addresses in Oracle Receivables. Failure to set up address combinations can result in errors when attempting to create customers.

Login

Log in to Oracle Forms.

Responsibility

Receivables Manager

Steps

1. Select **Setup > Tax > Locations**.
2. Follow the procedure for defining tax locations and rates outlined in the *Oracle Receivables User Guide*.

2.4.3 Address Formats

Oracle Quoting provides user country specific address information fields and performs validation on each country's mandatory fields.

To set up country specific address formats in Oracle Receivables:

Login

Log in to Oracle Forms.

Responsibility

Receivables Manager

Steps

1. Choose **Setup > System > Countries**.

The Countries and Territories window opens.

2. Search for country as follows:

- a. Choose **View > Query By Example > Enter**.

- b. In the Country/Territory field of the Countries and Territories window, enter the name of the country for which you want to choose an address format.

- c. Press **Ctrl + F11** to submit the query.

The Countries and Territories window is populated with the data for the country.

Note: Alternatively, you can choose **View > Find All** to populate the Countries and Territories window with data for every country.

3. In the Countries and Territories window, choose an address format from the country's Address Style list of values (LOV).

4. Save the form.

When the user enters an address, the address style set up for that user's selected country is displayed.

2.4.4 Setting up Oracle Advanced Pricing

Oracle Quoting uses Oracle Advanced Pricing to set up essential pricing information including:

- Price Lists — Every product you want to sell must be on a price list. In Oracle Advanced Pricing you set up price lists, add inventory items to them, and modify them as needed.
- Modifiers — Modifiers enable you to set up price adjustments, such as discounts and surcharges, and freight and special charges. A Promotion is an example of a modifier.

- Agreements — Through Oracle Advanced Pricing, Quoting users can set up agreements with customers. Agreements allow you to define payment terms, prices, and freight terms for a specific customer.

For information on setting up price lists, modifiers or agreements, see the *Oracle Advanced Pricing User's Guide* or the *Oracle Order Management Suite Implementation Manual*.

Note: Oracle Quoting - HTML does not support modifiers that have formulas with pricing attributes. However, if the formulas are very simple—contain only numeric constants and do not require pricing attributes to be passed in order to evaluate them—Quoting - HTML does support them.

2.4.5 Attributes

Attributes are used to create criteria for the Pricing Qualifiers you set up in Oracle Pricing. For example, use the Customer Name attribute to create Pricing Qualifiers limiting available promotions based on Customer Name.

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

Attributes Supported by Oracle Quoting

The following table lists the Oracle Pricing Attributes Supported by Oracle Quoting.

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Customer	Account Type	Line/Header	Qualifier
Customer	Agreement Name	Line/Header	Qualifier
Customer	Agreement Type	Line/Header	Qualifier
Customer	Bill To	Line/Header	Qualifier
Customer	Customer Class	Line/Header	Qualifier
Customer	Customer Name	Line/Header	Qualifier
Customer	GSA Indicator	Line/Header	Qualifier
Customer	Invoice To Party Site	Line/Header	Qualifier

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Customer	Party Id	Line/Header	Qualifier
Customer	Sales Channel	Line/Header	Qualifier
Customer	Ship To	Line/Header	Qualifier
Customer	Ship To Party Site	Line/Header	Qualifier
Customer	Site Use Id	Line/Header	Qualifier
Item	ALL_ITEMS	Line	Pricing
Item	Inventory Item Id	Line	Pricing
Item	Item Category	Line	Pricing
Item	Segment 1 (Key item flexfield segments)	Line	Pricing
Item	Segment 2	Line	Pricing
Item	Segment 3	Line	Pricing
Item	Segment 4	Line	Pricing
Item	Segment 5	Line	Pricing
Item	Segment 6	Line	Pricing
Item	Segment 7	Line	Pricing
Item	Segment 8	Line	Pricing
Item	Segment 9	Line	Pricing
Item	Segment 10	Line	Pricing
Item	Segment 11	Line	Pricing
Item	Segment 12	Line	Pricing
Item	Segment 13	Line	Pricing
Item	Segment 14	Line	Pricing
Item	Segment 15	Line	Pricing
Item	Segment 16	Line	Pricing
Item	Segment 17	Line	Pricing
Item	Segment 18	Line	Pricing

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Item	Segment 19	Line	Pricing
Item	Segment 20	Line	Pricing
Line Volume	Item Amount	Line	Pricing
Line Volume	Item Quantity	Line	Pricing
Line Volume	Period1 Item Quantity	Line	Pricing
Line Volume	Period2 Item Quantity	Line	Pricing
Line Volume	Period3 Item Quantity	Line	Pricing
Modlist	Price List	Line/Header	Qualifier
Modlist	Promotion Number	Line/Header	Qualifier
Order	Customer PO	Line	Qualifier
Order	Line Category	Line	Qualifier
Order	Line Type	Line	Qualifier
Order	Order Category	Line	Qualifier
Order	Order Type	Line/Header	Qualifier
Order	Pricing Date	Line	Qualifier
Order	Request Date	Line	Qualifier
Order	Shippable Flag	Line/Header	Qualifier
Pricing Attributes	Model Id	Line	Pricing
Pricing Attributes	Parent List Price	Line	Pricing
Segment	Market Segment	Line/Header	Qualifier
Segment	Target Segment	Line/Header	Qualifier
Terms	Payment Terms	Line/Header	Qualifier
Terms	Shipping Terms	Line/Header	Qualifier
Territory	Territory	Line/Header	Qualifier
Volume	Line Volume	Line	Qualifier

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Volume	Line Weight	Line	Qualifier
Volume	Order amount	Line	Qualifier
Volume	Order Amount	Header	Qualifier
Volume	Order Qty	Line	Qualifier

2.4.6 Setting up Oracle General Ledger

When setting up Oracle General Ledger, you must define:

- A chart of accounts with a value set, and Accounting Flexfield Structure as well as segments and segment values
- A calendar
- Currencies (enable currencies in order to use them)
- A set of books

Refer to the *Oracle General Ledger User Guide* for information on how to perform these tasks.

2.4.7 Setting up Oracle Inventory

Oracle Inventory serves as a repository for the items available for purchase in Oracle Quoting. Oracle Quoting supports the use of all items as long as they are *Orderable*.

Currently, in both the Forms and HTML versions of Oracle Quoting, product and related product searches are filtered as follows:

- The current date must be within the start and end date range set for the product, if any.
- The product must be valid for the inventory organization of the operating unit in which the quote is created.
- The product must be in the default category set defined for the functional area "Order Entry." This condition is not applied for related items that are filtered on the basis of an existing item relationship with the selected product.
- The product must have the "Customer Orders Enabled" flag enabled.
Note: In the Forms UI, the "Returnable" flag must be enabled if the Line Category Code is *Return*.
- The BOM Item Type must be *Model* or *Standard*.
- The Primary UOM is not *ENR*.

2.4.8 Setting up Oracle Order Management

To avoid setup problems, perform the following setups in Oracle Order Management.

Setting up the Default Item Validation Organization

You must set up the default **Item Validation Organization** for your operating unit in Oracle Order Management. This can be done in the Oracle Order Management application **Setup > Parameter** menu. For more information, refer to the *Oracle Order Management Suite Implementation Manual*.

Setting up Shipping Methods in Oracle Order Management

Oracle Quoting and Oracle Order Management treat shipping method modifier types differently. **It is important to select only one modifier type when setting up an Oracle Quoting shipping method in Oracle Order Management.**

For more information or to troubleshoot Oracle Quoting shipping method modifier types see [Section 6.3.4, "Quote Status Remains Contract Pending When Contract is Canceled"](#).

Assign Workflow to the Transaction Type Selected in ASO: Default Order Type

To assign workflow for the transaction type you select in **ASO: Default Order Type**:

Login

Login to Oracle Forms.

Responsibility

Oracle Order Management Super User

Prerequisites

You must have a transaction type set up.

Steps

1. Navigate to **Setup > Transaction Type > Define**.
2. Query for the value in **ASO: Default Order Type**.

2.5 Conditional Dependencies

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

- **Oracle Approvals Management** — Allows users to create an approval chain. Refer to the *Oracle Approvals Management Implementation Guide* for complete setup information.

- **Oracle Configurator** — Configures model items. Refer to the *Oracle Configurator Installation Guide* and *Oracle Configurator Implementation Guide* for complete setup information.
- **Oracle Contracts for Sales** — Enables users to include standard and non-default contracts with quotes. Refer to the *Oracle Contracts for Sales Concepts and Procedures* for more information.
- **Oracle iPayment** — Enables credit card authorizations. Refer to the *Oracle iPayment Implementation Guide* for complete setup information.
- **Oracle Install Base** — Provides a list of all customer's products and installation details. Refer to the *Oracle Install Base Implementation Guide* for complete setup information.
- **Oracle Reports Developer 6i** — Centralizes report processing and manages reporting. Refer to *Oracle Reports Developer Building Reports* and *Oracle Reports Developer Publishing Reports*.
- **Oracle Reports Server** — Enables development of print quote. Oracle Reports Server must be configured for quote printing. Refer to *Oracle Reports Developer Getting Started* for complete setup information.
- **Oracle Sales Online** — Allows sales representatives to create quotes in a campaign-to-order business flow from the HTML UI. Refer to the *Oracle Sales Online Implementation Guide* for complete setup information.
- **Oracle Service Contracts** — Provides contract details for service items. Refer to the *Oracle Contracts for Service Implementation Guide* for complete setup information.
- **Oracle TeleSales** — Allows sales representatives to create quotes in a campaign-to-order business flow from the Forms UI. Refer to the *Oracle TeleSales Implementation Guide* for complete setup information.
- **Oracle Workflow** — Provides notifications related to Approvals and Contracts integration. Refer to the latest version of the *Oracle Workflow Guide* for more information.

2.6 Dependency Verification

Refer to the following documentation to ensure that all dependencies are installed, implemented, and set up correctly. These documents are available on MetaLink.

Oracle CRM Application Foundation Implementation Verification Checklist

Part II

Implementing Oracle Quoting

This section of the Oracle Quoting Implementation Guide contains the following chapters:

- [Chapter 3, "Implementation Overview"](#)
- [Chapter 4, "Implementation Tasks for Oracle Quoting"](#)

Implementation Overview

3.1 Oracle Quoting Implementation Overview

Mandatory implementation steps are required for Quoting to function properly. Optional steps provide enhanced functionality. This chapter contains:

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

3.1.1 Process Description

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

To effectively implement Oracle Quoting, you must perform the following mandatory tasks:

- Set up quote status
- Set system profile options
- Enable the cache for the HTML UI

For enhanced functionality, set up the following:

- Security
- Web publishing
- Sales supplement templates
- Sidebar menu (HTML UI)
- Approvals
- Contracts
- Credit Checking
- interMedia Search

Note: If you are implementing Oracle Quoting in a multi-org environment, please refer to the *Multiple Organizations in Oracle Applications* manual available on MetaLink.

3.1.2 Implementation Task Sequence

The following table describes the implementation process for Oracle Quoting.

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Performed By
1	Set up quote status and quote status transitions. Define new or modify seeded quote statuses, status transitions, and extensibility rules based on business needs.	Yes	Quoting Sales Manager
2	Set up system profile options. Define system profile values. These affect the way Oracle Quoting looks and performs.	Yes	System Administrator
3	Enable cache in the HTML UI. Setup is mandatory for Quoting - HTML users.	Yes	System Administrator
4	Assign a seeded or customized Oracle Quoting responsibility to user.	Yes	System Administrator
5	Set up default expiration date using one of the available methods.	Yes	System Administrator
6	Set up overrideable modifiers in Oracle Advanced Pricing if ASO: Discounting Privilege is set to Full .	Mandatory if using discounts or surcharges	Oracle Pricing Manager
7	Set up the Sidebar Menu (HTML). Customize the menu if you disable any functionality.	Optional	Application Developer
8	Customize the Lines page (HTML).	Optional	Applications Developer Common Modules
9	Disable Actions menus and buttons (HTML).	Optional	Quoting Sales Manager
10	Customize the Overview page (HTML).	Optional	Application Developer Common Modules

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Performed By
11	Set up Security. Set security specific profile options, and create resources and groups.	Mandatory if using Security	System Administrator CRM Administrator
12	Set up print quote. To have personalized print quote reports, customize the report in Report Builder.	Optional	System Administrator
13	Set up Manual Pricing Request options.	Optional	System Administrators
14	Enable interMedia Search	Optional	iStore Concurrent Programs System Administrator
15	Set up Account Creation requirements	Optional	System Administrator
16	Set up Proposals. Enable the Proposals link in the Overview sidebar.	Optional	Application Developer
17	Set up Web Publishing functionality. Set specific profiles and set up specialty stores in iStore.	Mandatory to publish quotes	System Administrator iStore Administrator
18	Set up Approvals. To enable approvals, set specific profile options and conditions and rules.	Mandatory for approvals	System Administrator AME (Approvals Management Engine) Administrator
19	Set up Contracts. To enable contracts, set specific profile options and workflow notifications.	Mandatory to include contracts with quotes	System Administrator Contracts Administrator
20	Set up Credit Check functionality To enable credit check, set specific profile option.	Optional	Order Management Super User (for credit check rules) System Administrator

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Performed By
21	<p>Set up Sales Supplement functionality.</p> <p>Use this functionality if you require supplemental information on quotes that will not pass into Oracle Order Management. Enable sales supplement functionality in Oracle Forms and view it in the HTML UI.</p>	Optional	Quoting Sales Manager
22	<p>Modify seeded Lookup Types.</p> <p>Some seeded lookups types are extensible and can be modified.</p>	Optional	Quoting Sales Manager Application Developer
23	<p>Create additional attachments document categories.</p> <p>Oracle Quoting supports one document category. You can create additional document categories as needed.</p>	Optional	Application Developer
24	<p>Define descriptive flexfields.</p> <p>Customizable, undefined fields on the Oracle Quoting form that the application developer can define as needed.</p>	Optional	Application Developer

Implementation Tasks for Oracle Quoting

This topic group details the steps necessary to implement Oracle Quoting.

- [Setting Up Quote Status and Quote Status Transitions](#)
- [Setting System Profile Options](#)
- [Enabling the Cache for Oracle Quoting \(HTML\)](#)
- [Assigning a Seeded Oracle Quoting Responsibility to a User](#)
- [Setting up the Default Expiration Date](#)
- [Setting up Overrideable Modifiers](#)
- [Enabling or Disabling Sidebar Menu Functionality \(HTML\)](#)
- [Customizing the Lines Pages \(HTML\)](#)
- [Disabling Action Menus and Buttons \(HTML\)](#)
- [Customizing the Overview Page \(HTML\)](#)
- [Setting up Security](#)
- [Setting Up the Print Quote Functionality](#)
- [Setting up Manual Pricing and Tax Calculation Request Options](#)
- [Enabling interMedia Search](#)
- [Setting Up Account Creation Requirements for Quotes](#)
- [Setting up Web Publishing Functionality](#)
- [Setting up Approvals](#)
- [Setting up Contracts](#)
- [Setting Up Credit Check Functionality](#)

-
- Setting up Sales Supplement Templates
 - Modifying Seeded Lookup Types
 - Creating Additional Attachments Document Categories
 - Defining Descriptive Flexfield Information

4.1 Setting Up Quote Status and Quote Status Transitions

Use this procedure to perform the following tasks:

- Add new quote statuses
- Enable or disable existing quote statuses
- Set up the allowable status changes, or transitions, for each status
- Indicate a read-only status
- Set up quote versioning (Forms only)

The status of a quote indicates the evolution of a quote from the initial offer to order placement. Quote statuses and transitions reflect your quote cycle. You may also define your quote statuses to determine what kind of changes a sales representative can make to the quote.

If a quote status is read only you may perform the following:

- Modify tasks and notes
- Change the quote status, as long as the transition is valid
- Publish or unpublish a quote, if publishing is enabled and the quote satisfies publishing criteria
- Modify payment information, prior to submission of order
- Add attachments; you cannot remove, or replace existing attachments

If a status is user maintainable, the application administrator can modify any attribute of the status.

If a status is not user maintainable, it means that:

- The application administrator cannot remove the status from the system.
- The application administrator cannot change any attribute of the status except the name appearing in the status list of values

Oracle Quoting is delivered with predefined quote statuses. You can define new quote statuses to reflect your business processes. But you cannot modify seeded statuses unless they are user maintainable. In addition, you cannot delete any statuses. You must deactivate those statuses you no longer want to use.

Note: Users with the System Administrator responsibility can define an Oracle Quoting default quote status using the profile option **ASO: Default Quote Status**. This default status is applicable to new quotes as well as to new versions of existing quotes.

The following table lists the seeded quote statuses.

Table 4-1 Seeded Quote Statuses

Quote Status	Description	Read-only
Approval Canceled	Sales representative canceled the approval process.	No
Approval Pending	Quote is pending approval, and is read-only.	Yes
Approval Rejected	Approval was rejected by the approvers.	No
Approved	Approved by the necessary approvers.	Yes
Contract Canceled	Contract canceled by the contract administrator.	Yes
Contract Pending	Contract is in review with the contract specialist.	Yes
Contract Required	Contract specialist to author and approve contract required after approval process.	Yes
Draft	Initial status of quote.	No
Inactive	No more activity allowed on the quote.	Yes
Order Submitted	Quote has been submitted as an order to Oracle Order Management.	Yes
Store Draft	For iStore internal use only. Allows iStore to have a Draft to Order flow that is separate from Quoting.	No

The statuses in the following table exist for backward compatibility (for previous version of Oracle Quoting), but there is no functionality associated with them.

Quote Status	Description	Read-only
Bid	Could be used to show that the quote was presented to a customer.	No
Lost	Could be used to show that the customer declined/rejected the quote.	No

Quote Status	Description	Read-only
Problem	Could be used to show there is a problem submitting the quote as an order. Note: The system will not automatically set this status if the order is not submitted.	No
Reviewed	Could be used to show that the quote was reviewed internally.	No

The statuses *Ordered* and *Entered* are obsolete in this release. They still appear in the Quote Status setup form but they will be locked. You will not be able to create any transitions to them, nor can you enable them.

Note: If you designated a quote status as read-only in a previous release of Oracle Quoting, it will not be overwritten in this release, regardless of the out-of-box designation. For example, if you defined the status **Lost** as *read-only* in 11.5.6, it will remain *read-only* in this release.

4.1.0.1 Rules for Quote Status Changes

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

Not all transitions are seeded. You may have to set up certain transitions to use additional functionality. For example, the status transition *Draft to Inactive* is not seeded but is necessary if you want to inactivate quotes.

Note: You cannot set up a transition from a status to itself.

The following table shows the seeded transition rules for quote status changes.

Table 4–2 Seeded Quote Status Transitions

From	To	User Maintainable
Approval Pending	Approved	No
Approval Pending	Approval Canceled	No
Approval Pending	Approval Rejected	No

Table 4–2 Seeded Quote Status Transitions

From	To	User Maintainable
Approval Pending	Contract Required	No
Contract Pending	Approved	No
Contract Pending	Contract Cancelled	No
Contract Required	Contract Pending	No
Store Draft	Draft	No
Store Draft	Inactive	No
Store Draft	Order Submitted	No
Store Draft	Contract Pending	No

If a seeded transition is user maintainable, the application administrator can disable the transition. If the transition is not user maintainable, the application administrator cannot disable the transition as this is used by the system to enforce functionality.

You cannot create new transitions **to** the following statuses:

- Approval Canceled
- Approval Rejected
- Approved
- Contract Canceled
- Contract Required
- Store Draft

You cannot create new transitions **from** the following statuses:

- Approval Pending
- Contract Canceled
- Contract Pending
- Contract Required
- Order Submitted
- Store Draft

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Prerequisites

None

Steps

1. Navigate to the Quote Status Setup window.
2. To add a new quote status:
 - a. In the Quote Statuses region, select a blank entry line or the line below which to insert the new entry.
 - b. Enter the status code. This is the internal name and is not seen by the user.
 - c. Enter the status name and status description. These are displayed in the list of values for users.
 - d. To enable end-user initiated changes to the quote, check the **Update Allowed** box. To make the status read-only, uncheck the **Update Allowed** box.

Note: A user can fully update a quote in read-only status if the system administrator sets the profile option **ASO: Status Override** to **Yes** for that specific user. The user must have update access to the quote.

- e. **Forms Only:** To create a new version when the user selects the save icon for a quote, check the **Auto Versioning** box for the new status.
 - f. To enable the status, check the **Enabled** box.
 - g. Select **Save** on the toolbar.
3. To set up the rules that determine permitted status transitions for a particular status:
 - a. In the Quote Statuses region, select the status to set up.

- b. In the Allowed Transition to Status region, use the Code LOV to select an allowable transition status. You can allow transitions to multiple statuses.
- c. Repeat the previous step for each permitted transition status.
- d. To disable an existing status, uncheck the **Enabled** box.
- e. Select **Save** on the toolbar.

4.2 Setting System Profile Options

Use [Appendix A, "Oracle Quoting Profile Options"](#) to identify the profile options to set for your specific implementation. There is no recommended order for setting profile options.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Navigate to **Profile > System**.
The Find System Profile Values window opens.
2. Check the **Site** box.
3. Enter ASO% in the **Profile Name** field.
4. Select the **Find** button.

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

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

4.3 Enabling the Cache for Oracle Quoting (HTML)

The Performance Framework in Oracle CRM Technology Foundation optimizes application performance with a Java objects cache that is based in the middle tier. Use of Oracle Quoting - HTML requires that you enable the cache. APIs will not work properly if you do not.

1. Follow the instructions for Using Caches in the *Oracle CRM Technology Foundation Concepts and Procedures*.
2. Make sure that Oracle Quoting is on the list of deployed applications.

For information on seeded caches in Oracle Quoting, see [Appendix E, "Oracle Quoting Seeded Caches"](#). For information on enabling cache for the Quoting application, see *Oracle CRM Technology Foundation Concepts and Procedures*.

4.3.1 Modifying the Cache Policy for a Particular Component (Optional)

You can modify the cache policy for Oracle Quoting using the procedure outlined in *Oracle CRM Technology Foundation Concepts and Procedures*.

4.4 Assigning a Seeded Oracle Quoting Responsibility to a User

The following Oracle Quoting seeded responsibilities are available:

- Quoting Sales Agent (Forms)
- Quoting Sales Manager (Forms)
- Oracle HTML Quoting Sales Agent

Note: If you want to create your own responsibilities, assign the menu QOT_QUOTE_ROOT to the responsibility.

To assign the Quoting HTML seeded responsibility (Oracle HTML Quoting Sales Agent) to a user:

Login

Login to Oracle Forms.

Responsibility

System Administrator

Prerequisites

The user must be set up as an application user.

Steps

1. Navigate to **Security > User > Define**.
2. Select **Query by Example > Enter** from the View menu.
The searchable fields turn blue.
3. Search for the user by entering a partial or complete name or user name.
4. Select **Query by Example > Run** from the View menu.
The form displays the record for the user.
5. In the Responsibilities tab, select **Oracle HTML Quoting Sales Agent** from the Responsibility LOV.
6. Save your changes by selecting the save icon.
7. After assigning the responsibility to the user, you must ensure that the profile `JTF_PROFILE_DEFAULT_RESPONSIBILITY` is set to 23410.
8. Ensure that the profile option `JTF_PROFILE_DEFAULT_APPLICATION` is set to 880.

4.5 Setting up the Default Expiration Date

You can set the default quote expiration date so that quotes expires:

- At the end of a calendar period, e.g., quarter or month
- At the end of a fixed number of days

Expiration Date Based on Calendar Period

You can set the default quote expiration date so that quotes expire at the end of each quarter, month or other calendar period. During setup, users can designate an Oracle General Ledger (GL) calendar and period type from which the default expiration date is calculated.

The Oracle General Ledger calendar selection is controlled by the profile option **ASO: Default Expiration Date GL Calendar**. Available options include all calendars set up in Oracle Accounts Receivables.

The General Ledger period is controlled by the profile option **ASO: Default Expiration GL Period Type**. Available options include all period types set up for the selected GL calendar. For more information on these profile options, see [Appendix A, "Oracle Quoting Profile Options"](#).

The expiration date is set to the last date of the selected period. For example, if **ASO: Default Expiration GL Calendar** is set to **Sample Calendar** and **ASO: Default Expiration GL Period Type** is set to **Quarter**, then the quote expiration date defaults to the last day of the current quarter.

Expiration Date Based on a Fixed Number of Days

Alternatively, you can set the default quote expiration date so that quotes expire after a fixed number of days. The fixed number of days defaults from the profile option **ASO: Quote Duration**. For more information, see [Appendix A, "Oracle Quoting Profile Options"](#).

Note: The value defined in **ASO: Quote Duration** is only used if one or both of the GL Calendar profiles are null.

4.6 Setting up Overrideable Modifiers

If the profile **ASO: Discounting Privilege** is set to **Full**, users can manually override prices. If you want users to have this ability, you must ensure that at least four non-automatic modifiers are set up in Oracle Advanced Pricing. At the Header level, there should be one discount and one surcharge with application methods of percent or amount. At the Line Level, there should be one discount and one surcharge set up with application methods of percent.

For information on setting up modifiers, refer to the latest version of the *Oracle Pricing User's Guide*.

4.7 Enabling or Disabling Sidebar Menu Functionality (HTML)

The sidebar menu in the HTML User Interface is not dynamically rendered. To disable optional functionality, the related profile must be set to **No**. You can then remove the relevant links from the sidebar menu. Note that the disabling of functionality is global and affects all users. You must log out and bounce the Apache server for changes to take effect.

You may remove the following links related to optional functionality:

- Approvals: menu query is QOT_SALES_INFORMATION
- Sales Team: menu query is QOT_SALES_INFORMATION
- Contracts: menu query is QOT_SALES_INFORMATION
- Proposals: menu query is QOT_SALES_INFORMATION
- Sales Supplement: menu query is QOT_OTHER_INFORMATION
- Additional Information: menu query is QOT_INFORMATION

Login

Login to Oracle Forms

Responsibility

Applications Developer

Prerequisites

The profile option for the functionality to be disabled is set to **No**.

Steps

1. Navigate to **Applications > Menu**. The Menus form displays.
2. From the View menu, select **Query by Example > Enter**.
3. Enter **QOT_SALES_INFORMATION** in the Menu field to display the Sales Information menu details and disable Approvals, Sales Team and/or Contracts.

Enter **QOT_OTHER_INFORMATION** in the Menu field to display the Other Information menu and disable Sales Supplement.

Enter **QOT_INFORMATION** in the Menu field to display the Quote Information menu and disable the Additional Information link.
4. From the View menu, select **Query by Example > Run**. The page refreshes with the line detail for the menu.
5. Select the line to disable. From the Edit menu, select **Delete** or place the cursor in the Prompt field and clear it by selecting **Edit > Clear > Field**.
6. Select the save icon. A confirmation message displays with your request identification. Note down this number so that you can track the relevant concurrent program. When the program has completed, bounce the Apache server. At your next login, the changes will be visible.

4.8 Customizing the Lines Pages (HTML)

Oracle Quoting allows you to customize some elements of the Lines page. You can:

- Select which columns to display or hide
- Edit column labels
- Change column sequence
- Enable/disable line level actions and table buttons

Note: Once you change the seeded values, there is no way to revert them back to the original definitions.

The following table shows a mapping of the column label to the attribute name.

Table 4–3 Column/Attribute Mapping

Column Name (Label)	Attribute Name
Select	QOT_SELECT
Product	QOT_PRODUCT
Description	QOT_DESCRIPTION
Quantity	QOT_QUANTITY
UOM	QOT_UOM
Unit List Price	QOT_UNIT_LIST_PRICE
Unit Adjustment Percent	QOT_UNIT_ADJUST_PERCENT
Line Discount	QOT_LINE_DISCOUNT
Unit Selling Price	QOT_UNIT_SELLING_PRICE
Total Price	QOT_TOTAL_PRICE
Charges	QOT_CHARGES
Line Category	QOT_LINE_CATEGORY
Line Type	QOT_LINE_TYPE
Line (Line Number)	QOT_LINE
Instance Name	QOT_INSTANCE_NAME

Table 4–3 Column/Attribute Mapping

Column Name (Label)	Attribute Name
Custom Columns	QOT_CUSTOM_COL1, QOT_CUSTOM_COL2, QOT_CUSTOM_COL3
Tax Details	QOT_TAX_DETAILS

4.8.1 Display/Hide Columns

You can choose which seeded columns to display or hide on the Lines page and in the Lines section of the Overview page.

The following mandatory columns are always displayed:

- Select
- Product
- Description
- UOM
- Quantity

The following seeded columns are optional:

- Unit List Price
- Unit Adjustment Percent
- Line Discount

Note: If **ASO: Calculate Price** is set to **Manual**, the Line Discount field is not shown even if it is enabled and the user has the ability to perform price overrides.

- Unit Selling Price
- Total Price
- Charges
- Line Category
- Line Type
- Line Number

- Instance Name
- Link to Customer Page
- Tax Details

To hide or display a seeded column:

Login

Login to Oracle Forms.

Responsibility

Applications Developer Common Modules

Prerequisites

None.

Steps

1. Navigate to **Define Regions**. The Define Regions form displays.
2. From the View menu, select **Query by Example > Enter**.
3. Enter QUOTELINEDETAILS in the Region ID field.
4. From the View menu, select **Query by Example > Run**.
5. Select **Region Items**. The Region Items form displays.
6. To hide a seeded column, deselect the Node Display checkbox for the corresponding column. Selecting this checkbox displays the column.

Note: Although you can deselect the Node Display checkbox for the mandatory columns, they will still display in the Quoting UI. You cannot disable these columns.

7. Select the save icon. A confirmation message displays.
8. Bounce web server. When you next login, the changes are visible.

4.8.2 Edit Column Labels

You can edit default text labels for each column.

To revise column labels:

Login

Login to Oracle Forms.

Responsibility

Applications Developer Common Modules

Prerequisites

None

Steps

1. Navigate to **Define Regions**. The Define Regions form displays.
2. From the View menu, select **Query by Example > Enter**.
3. Enter QUOTELINEDETAILS in the Region ID column.
4. From the View menu, select **Query by Example > Run**.
5. Select **Region Items**. The Region Items form displays.
6. To change a column label, enter a new value in the Long Label field of the corresponding line.
7. Select the save icon. A confirmation message displays.
8. Bounce web server. When you next login, the change is visible.

4.8.3 Edit Column Sequence

You can choose the order in which columns are displayed.

To edit column sequence:

Login

Login to Oracle Forms.

Responsibility

Applications Developer Common Modules

Prerequisites

None

Steps

1. Navigate to **Define Regions**. The Define Regions form displays.
2. From the View menu, select **Query by Example > Enter**.
3. Enter QUOTELINEDETAILS in the Region ID column.
4. From the View menu, select **Query by Example > Run**.
5. Select **Region Items**. The Region Items form displays.
6. Change the values in the Sequence fields to rearrange columns. The lowest sequence number is the first column displayed on the Lines page.
7. Select the save icon. A confirmation message displays.
8. Bounce web server. When you next login, the changes are visible.

4.8.4 Enable/Disable Line Level Actions or Table Level Buttons

You can choose to enable or disable line level actions and table level buttons. This allows you to control the actions that a user can perform on the Lines page. See [Section 4.9, "Disabling Action Menus and Buttons \(HTML\)"](#) for more information.

4.8.5 Customizing the Details Columns

You can customize the Details columns on the Lines page (HTML UI). These files are hardcoded to the names:

- customLineDetails1.jsp
- customLineDetails2.jsp
- customLineDetails3.jsp

If you want to enable and use these columns, you must provide the jsp files, using the filenames provided above.

Oracle quoting passes in two parameters for these columns:

- qotHdrId—Quote header ID
- qotLnId—Quote line ID

4.9 Disabling Action Menus and Buttons (HTML)

You can customize the Actions menus on the Lines and Overview pages. You can also customize the buttons on the Lines page. Through customization, you determine which options appear.

Note: If you want to add new lookup codes to the lookup types, you must implement the logic. Oracle Quoting only supports the seeded out-of-box values.

The menus are controlled by lookup codes. See [Appendix B, "Seeded Lookup Types"](#) for more information.

Table 4–4 Lookup Types for Action Menus and Buttons

Lookup Type	Description
ASO_LINE_ITEM_ACTION	Determines which actions appear in the Lines page Actions menu.
ASO_LINE_ACTION	Determines which line level actions appear on the Lines page.
ASO_QUOTE_ACTION	Determines which actions appear in the Overview page Actions menu.
ASO_IB_ACTION_TYPES	Determines which actions are available on the Search and Select: Installed Base Product page.
ASO_PRODUCT_SOURCE	Determines sources available when performing a product search.
ASO_IB_RELATIONSHIP_TYPES	Determines which Install Base relationship types are available.

To enable or disable actions or buttons:

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Prerequisites

The lookup code must be extensible.

Steps

1. Navigate to **Setup > Quick Codes**.
2. Select **View > Query by Example > Enter**.
3. Enter the lookup type in the Type field.
4. Select **View > Query by Example > Run**.
The record displays.
5. Locate the code to enable and select the Enabled checkbox.
To disable the lookup code, deselect the checkbox.
6. Save your work.
7. Bounce the web server. When you next log in, the change is visible.

4.10 Customizing the Overview Page (HTML)

By default, the Overview Page displays six sections:

- General Information
- Lines
- Grand Total
- Addresses
- Shipping
- Payment

With the exception of General Information, you can hide these sections.

The following table maps the section name with its attribute name.

Table 4-5 Section/Attribute Mapping

Section Name	Attribute Name
Lines Section	QOT_LINES
Grand Total Section	QOT_GRAND_TOTAL

Table 4–5 Section/Attribute Mapping

Section Name	Attribute Name
Addresses Section	QOT_ADDRESS
Shipping Section	QOT_SHIPPING
Payment Section	QOT_PAYMENT

To hide a section:

Login

Login to Oracle Forms.

Responsibility

Applications Developer Common Modules

Prerequisites

None

Steps

1. Navigate to **Define Regions**. The Define Regions form displays.
2. From the View menu, select **Query by Example > Enter**.
3. Enter `QUOTEOVERVIEWSECTIONS` in the Region ID column.
4. From the View menu, select **Query by Example > Run**.
5. Select **Region Items**. The Region Items form displays.
6. To hide a section, deselect the Node Display checkbox for the corresponding section. Selecting this checkbox displays the section.
7. Select the save icon. A confirmation message displays.
8. Bounce web server. When you next login, the changes are visible.

4.11 Setting up Security

To enable security in Oracle Quoting, you must set the security profile options, listed in [Appendix A, "Oracle Quoting Profile Options"](#).

In addition, all users must be set up as valid Resources and assigned to sales groups.

To view examples of how quoting security can be implemented, see [Appendix C, "Oracle Quoting Security Scenarios"](#).

Note: Selecting a group for the Primary Sales Agent determines where quote information shows up in Daily Business Close. For example, a sales representative is part of Sales Group 1 and Sales Group 2. If you want the sales representative's stats to roll up to Group Manager 1, you must select Sales Group 1 as the Primary Sales Agent's sales group for that representative.

4.11.1 Setting up Security Profile Options

For information on how to set profile options, see [Section 4.2, "Setting System Profile Options"](#). For a complete list of the security profile options, see [Section A.1, "Current Profile Options"](#).

4.11.2 Creating a Resource

If you want all users to have access to Oracle Quoting when security is enabled, they must be set up as valid resources in Oracle Resource Manager.

When you create a resource you assign roles to the resource.

You can create a resource either by entering the user information into Resource Manager or by importing an employee from Oracle Human Resources into Resource Manager.

For information on creating a resource, refer to the *Oracle CRM Application Foundation Concepts and Procedures*.

4.11.3 Setting Up Manager Roles

Oracle Quoting security uses roles to determine which resources are managers. A manager must have an active role, of any role type, with the Manager flag checked. In addition, a manager must have the appropriate role in the context of a group.

Managers have access to all quotes for the sales team they belong to. You can also set up a manager to have access to all quotes for the sales teams to which their subordinates belong.

[Table 4–6, "Role Type Example"](#) lists the users, roles, roles attributes, and role types for employees at a fictional company.

Table 4–6 Role Type Example

User	Role	Role Attribute	Role Type
Bob Jones	Regional Sales Manager	Manager	Sales
Jane Adams	District Sales Manager	Manager	Sales
John Franklin	Sales Agent	Member	Sales
Jennifer Moore	Sales Agent	Member	Sales

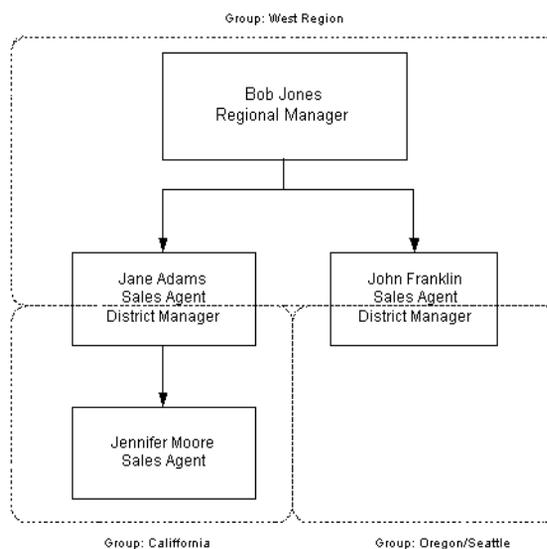
For complete instructions on setting up roles, refer to the *Oracle CRM Application Foundation Concepts and Procedures*.

4.11.4 Setting up a Group

Groups are used in Oracle Quoting security to determine the resource hierarchy. Groups identify the subordinates under a particular manager. The resource with a manager role in a group is considered the manager of all other resources in that group and any child group.

A resource can belong to multiple groups. Only one resource with a manager role should be in each group.

The following diagram demonstrates how the information in [Table 4–6](#) is used to infer a hierarchy in Oracle Quoting.

Example 4–1 Sales Resource Manager Group Example**Login**

Login to Oracle Forms.

Responsibility

Resource Manager

Prerequisites

None

Steps

Note: If you are defining group hierarchies, set up the Parent group first.

1. Set up a group based on the procedure defined in the *Oracle CRM Application Foundation Concepts and Procedures*.
2. Make sure you select **Sales** and **TeleSales** from the Usage LOV.

4.11.5 Verify Group Setup

To verify that you have set up your groups correctly:

Login

Login to Oracle Forms.

Responsibility

Resource Manager

Prerequisites

None

Steps

1. Navigate to **Maintain Resources > Group Hierarchy**.
2. The Group Hierarchy form displays.
3. Use the LOV to search for a resource's name.
4. Select **View**.
5. The groups that the resource belongs to display in the Groups section.
6. Highlight a group to display its members.
7. Close the form.

4.12 Setting Up the Print Quote Functionality

Oracle Quoting uses Oracle Reports Server for Print Quote functionality.

The following steps are necessary for print quote to function properly. To set up print quote:

1. Designate a value for the profile **ICX: Report Server** at the appropriate level.

A valid file with a standard file name, CGIcmd.dat, is located in the ORACLE_HOME\REPORT60 directory on the Web server machine. This file contains a key map defined to simplify or hide parameters in your URL request. Enter this key as the profile value of **ICX: Report Server**.

There should be an entry with the format <DBSID>_APPS_NO_DESFORMAT. For example, if <DBSID> is SID01, then the profile ICX: Report Server must be set to SID01_APPS_NO_DESFORMAT.

Note: Ensure that the key you enter as the profile value does not contain the clause `desformat=HTML`.

For more information, see *Oracle Reports Developer - Publishing Reports*.

2. Set the profile **ASO: Print Quote Reports Directory** to `<$ASO_TOP>/reports` (specifying the absolute path, not the variable.) The Reports Server must have access to this directory.
3. Set the variable `REPSRV_NAME=Rep60_<SID>` in your report server startup script (`adrepctt.sh`).
4. Bounce web server.

4.12.1 Customizing the Print Quote Report

Currently, the base version of the print quote report populates the company address information based on the current Organization ID. If you set up the company logo, as detailed below, it will automatically be included in the report.

Note: To include tax details on your print quote report, set the profile **ASO: Show Line Level Tax Detail** to Yes. To include the Terms and Conditions from an executable quote, Oracle Sales Contracts integration must be enabled.

Login

Log in to Oracle Applications.

Responsibility

Quoting Sales Manager

Prerequisites

None

Steps

1. Select **Documents** from the Navigator.
The Documents form opens.

2. Select **PrintQuote** from the Category LOV.
3. Select **File** from the Source Data Type LOV.
The File Upload forms opens.
4. Browse for your file and select **OK**.
5. A window displays asking if your file uploaded successfully. Select **Yes**.
6. Save the document to the database.
7. Find the Document ID for the document
 - a. Select **Diagnostics > Examine** from the Help menu.
 - b. In the Examine Field and Variable Value form, enter `DOCUMENT_HEADER` for the Block and `DOCUMENT_ID` for the Field.
 - c. Note the value returned in the Value field.
Use this value to set the profile option **ASO: Company Logo** at the appropriate level to display the company logo on your print quote report.
8. Customize the report title.
 - a. Two customizable FND messages are registered for the print quote report, one for non-executable quotes and one for executable quotes. The message names are:
 - * `ASO_PQUOTE_EXEC_TITLE`
 - * `ASO_PQUOTE_NONEXEC_TITLE`
9. Customize the disclaimer.
 - a. If a quote is non-executable, you can customize the disclaimer printed on the bottom of the quote by changing the name of the `ASO_PQUOTE_DISCLAIMER` message.

4.12.2 Adding or Disabling the Report Templates

You can disable the seeded report template, **Default Print Layout**, if necessary. You can also add custom report templates.

To disable report templates:

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Prerequisites

None

Steps

1. Select **Quick Codes**.
2. Select **View > Query by Example > Enter**.
3. Enter **ASO_PQUOTE_TEMPLATES** in the Type field.
To disable the seeded report template, enter **ASOPQTEL**.
4. Select **View > Query by Example > Run**.
The record displays.
5. Locate the code to disable and deselect the Enabled checkbox.
To re-enable the lookup code, select the checkbox.
6. Save your work.
7. Bounce the web server. When you next log in, the change is visible.

4.12.3 Adding New Print Quote Templates

You can add new templates to the ASO_PQUOTE_TEMPLATES lookup code. Once you add templates to the lookup code, they appear as choices in the Template menu on the Print Quote page.

To add new templates to the lookup:

1. Select **Quick Codes**.
2. Select **View > Query by Example > Enter**.
3. Enter **ASO_PQUOTE_TEMPLATES** in the Type field.
4. Select **View > Query by Example > Run**.
The record displays.
5. Place your cursor in the first available line.
6. Enter a code for the new template.

7. Enter a meaning. This will appear in the Templates menu on the Print Quote page.
8. Optionally, enter a description for the template.
9. Ensure that the Enabled box is checked.
10. Save your work.
11. Bounce the web server. When you next log in, the change is visible.

The new template will appear in the Templates menu on the Print Quote page.

Note: The file must be copied to the location specified in the profile option **ASO: Print Quote Reports Directory**.

4.12.4 Product Categories

To show subtotals by product category in the quote print out, you must enter a value in the profile option **ASO: Category Set**. **ASO: Category Set** is used in Quoting - HTML when searching from the product catalog.

Note: The **ASO: Category Set** profile is optional. If this profile option is not set it will use the default category set for the Order Management functional area.

Product categories belong to category sets, which are defined in Oracle Inventory. When you set up a category set in Inventory, you must ensure that products do not belong to more than one product category.

Inclusion in more than one product category will affect subtotals by product category. For example, if a product belongs to category A and category B in the same category set, the subtotals for each category will include the price of the product, regardless of the fact that the product is only on the quote once.

Note: If a product is part of more than one category, the product will show up as a duplicate in the product search. Oracle Quoting does not expose Product categories in the UI, so users will not know that it is the same product in different categories.

4.13 Setting up Manual Pricing and Tax Calculation Request Options

Out of the box, Oracle Quoting automatically prices a quote whenever a potential price-affecting change is made. The pricing call also calculates taxes.

You can now manually price a quote, if the profile option **ASO: Calculate Price** is set to **Manual**. You can also choose to calculate tax manually by setting **ASO: Calculate Tax** to **Manual**. Depending on the setting of **ASO: Enable Batch Processing** you can choose to price the quote interactively or through a batch request.

Note: If **ASO: Calculate Price** is set to **Manual**, the Line Discount field in the HTML UI is not shown even if it is enabled and the user has the ability to perform price overrides. (HTML only)

The following table shows suggested settings for the Pricing Option profile options, based on user needs:

Table 4–7 Pricing Option Scenarios

Scenario	ASO: Calculate Prices Setting	ASO: Calculate Tax Setting	ASO: Enable Batch Processing Setting
Large number of quote lines, complex pricing and tax setups	Manual	Manual	Yes
Large number of quote lines, simple pricing and tax setups	Manual	Manual	Yes
Small number of quote lines, simple pricing setups, complex tax setups	Automatic	Manual	Yes
Small number of quote lines, simple pricing and tax setups	Automatic	Automatic	No
Small number of quote lines, complex, pricing, simple tax setups. Note: This combination is not recommended and not supported.	Manual	Automatic	Yes

Table 4–7 Pricing Option Scenarios

Scenario	ASO: Calculate Prices Setting	ASO: Calculate Tax Setting	ASO: Enable Batch Processing Setting
Small number of quote lines, simple pricing setups, no tax computation unless requested.	Automatic	Manual	No

4.13.1 Enabling Manual Pricing and Tax Requests

To enable manual pricing and tax requests, set the following profile options:

ASO: Calculate Price — Set to **Manual**, if the user does not want the quote to be priced when a change is made to the quote. The user must manually price the quote.

ASO: Calculate Tax — Set to **Manual**, if the user does not want tax to be calculated when a change is made to the quote. The user must manually request tax calculations for the quote.

Users can still manually compute price and tax even if these profile options are set to **Automatic**.

Note: Setting **ASO: Calculate Price** to **Automatic** and **ASO: Calculate Tax** to **Manual** is not recommended and not supported. This is not a valid setup, and the tax calculation may be wrong.

4.14 Enabling interMedia Search

Oracle Quoting supports the use of interMedia search against the Product Catalog.

Ensure that both Oracle interMedia and Oracle Inventory are properly set up and configured. The product search requires version 8.1.7 of the Oracle database with the interMedia option installed. Product search also requires version 11*i* of the Oracle Inventory schema.

Refer to the Oracle interMedia documentation for information on setting up interMedia. Refer to the *Oracle Inventory User's Guide* for information on setting up Inventory.

To enable Intermedia search:

1. Set the following profile option:

- **ASO: Enable Intermedia Search**

See [Appendix A, "Oracle Quoting Profile Options"](#) for more information.

2. Run the Concurrent Program iStore Search Insert

4.14.1 Running iStore Search Insert

Run this program after initially loading your products into Oracle Inventory. This program should be run once, as a post install step during implementation.

However, you may need to rerun the program if one of the following conditions occurs:

- You add multiple products that are not available in the search table
- You want to purge all data from the search table

The iStore Search Insert program collects product data from Inventory and inserts it into the Oracle iStore search table IBE_CT_IMEDIA_SEARCH. While this program is running, the product search will not work properly.

Note: You cannot have more than one Store Search Insert concurrent request instance running at one time.

Once complete, you can search for products by name, part number, or description.

To run the iStore Search Insert program:

Login

Log in to Oracle Forms.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

None

Steps

1. Select **Single Request** and select **Ok**.
2. Select **iStore Search Insert** from the Name LOV.

3. Select **Submit**. Note the request ID.
4. You can view the progress of the request by selecting **View Requests** and searching by Request ID.

4.14.2 Refreshing the Search Index

Administrators must refresh the interMedia search index, IBE_CT_IMEDIA_SEARCH_IM, every time an existing product is changed or deleted, or a new product is added.

Note: Before refreshing the index you must ensure that all triggers related to Inventory are enabled.

You must have privileges to modify the index. Refresh the index through Oracle Enterprise Manager or by executing the following command in SQL*Plus:

```
exec ctx_ddl.sync_index('IBE_CT_IMEDIA_SEARCH')
```

The changes appear in the product catalog.

4.15 Setting Up Account Creation Requirements for Quotes

Out of the box, Oracle Quoting does not require financial accounts—for customers without any accounts—when creating a quote. Sales representatives can create quotes for either prospects or customers. A prospect does not have a financial account, while a customer has one or more financial accounts.

Oracle Quoting allows you to determine at which point an account is created. For more information on the following profile options, see [Appendix A, "Oracle Quoting Profile Options"](#).

Account creation is based on the following profile options:

- **ASO: Auto Account Creation**—Determines when an account should be automatically created.

Depending on how you set the profile option **ASO: Auto Account Creation**, you can set up account restriction in the following ways:

- **Always create accounts**—Accounts are created for customers when the quote is saved.

- **Create accounts as necessary**—Accounts are created only when a quote is web published, a non-standard contract is created, or when a quote is converted into an order.
- **Create accounts only when Place Order**—Accounts are created only when the quote is converted into an order.

Scenarios

The following table shows the behavior of Oracle Quoting based on the setting of this profile option.

Table 4–8 Oracle Quoting Behavior Based on the Account Profile Option

Profile Option Setting	Create Sold-To	Select Sold-To	Create Ship-To/Bill-To	Select Ship-To/Bill-To	Web Publishing	Initiate Non-Standard Contract	Order Conversion
ASO: Auto Account Creation set to Always	Create account	Create account if customer has none	Create account	Create account if customer has none	Create account for all customers in quote without account	Create account for all customers in quote without account	Create account for all customers in quote without account
ASO: Auto Account Creation set to As Required	Do not create account	Do not create account	Do not create account	Do not create account	Create account for any customers in quote without account	Create account for any customers in quote without account	Create account for any customers in quote without account
ASO: Auto Account Creation set to Place Order	Do not create account	Do not create account	Do not create account	Do not create account	Throw error if any customers on quote do not have accounts	Throw error if any customers on quote do not have accounts	Create account for all customers on quote without an account

If **ASO: Auto Account Creation** is set to **Always**, an account is created for each party on the quote (that does not have an account) when the user saves a quote. In addition, each time a new customer is created, an account is created as well.

If **ASO: Auto Account Creation** is set to **As Required**, an account is created for each customer on the quote (that does not have an account) when the quote is:

- Web published
- A non-standard contract is initiated
- The quote is converted into an order.

If **ASO: Auto Account Creation** is set to **Place Order**, an account is created for each customer on the quote without an account when the quote is converted into an order.

4.16 Setting up Proposals

Oracle Quoting integrates with Oracle Proposals to provide proposal capabilities. With Oracle Proposals, Quoting users can create and email full proposals, including quote information, and other customized collateral to the customer.

To enable use of Proposals, ensure that the Proposals link is shown in the Quote Overview sidebar menu.

- Menu Name: QOT_SALES_INFORMATION
- Prompt: Proposals

For instructions on enabling a link in the sidebar menu, see [Section 4.7, "Enabling or Disabling Sidebar Menu Functionality \(HTML\)"](#).

4.17 Setting up Web Publishing Functionality

Web publishing functionality allows sales representatives to publish quotes to customers through Oracle iStore specialty stores.

4.17.1 Enabling Web Publishing

Use of web publishing functionality in Oracle Quoting is controlled by the profile option **ASO: Enable Web Publishing**. For more information on Oracle Quoting profile options for web publishing, see [Section A.1, "Current Profile Options"](#).

You must also set the profile **IBE: iStore Non Secure URL** to **iStore URL** at the application level. See [Section A.9, "Oracle iStore Profile Options"](#).

Note: If you are using the HTML UI and are integrated with Oracle Sales Online, you must set **IBE: iStore Non Secure URL** at the Application level for the application Oracle Field Sales. If you are not integrated with OSO, the profile should be set at the Application level for Oracle Quoting.

4.17.2 Setting Up a Specialty Store

Web Publishing functionality requires the setup of specialty stores in Oracle iStore. Customers can access published quotes through these Specialty Stores. For information on setting up specialty stores, refer to the *Oracle iStore Implementation Guide*.

Note: Oracle Quoting only supports Specialty Stores that have no access restrictions.

4.18 Setting up Approvals

For information on setting up Approvals functionality, refer to [Chapter 7, "Integrating Oracle Quoting With Oracle Approvals Management"](#).

4.19 Setting up Contracts

For information on setting up contracts functionality, refer to [Chapter 8, "Integrating Oracle Quoting With Oracle Sales Contracts"](#).

4.20 Setting Up Credit Check Functionality

Oracle Quoting allows the user to determine the credit worthiness of a customer before the quote is converted into an order. The profile option **ASO: Enable Credit Check** determines if credit checks can be performed. See [Appendix A, "Oracle Quoting Profile Options"](#) for more information.

Oracle Quoting provides a public API for credit checking: **ASO_CREDIT_CHECK_PUB.CREDIT_CHECK**. For more information on the credit check API, refer to the *Oracle Order Capture Foundation API Reference Manual*. The following information is mandatory for the public API:

- Header level bill-to customer, bill-to account, and bill-to address

- Credit Check Rule
- Quote Total
- Quote Currency

The credit check API consists of two sections:

- Internal credit check—This is based on the Oracle Order Management public API.
- External credit check—The public credit checking API in Oracle Quoting provides a pre-hook and post-hook for which customers can write configurable code. The pre-hook is executed prior to the internal credit check and the post-hook is executed after the internal credit check. Quoting customers can use these hooks to invoke the external credit checking.

4.20.1 Internal Credit Check

Oracle Quoting supports the use of internal credit checks. Internal Credit Checks are based on:

- Transaction data in the quote
- Historic transaction data in Oracle Order Management and Oracle Receivables

These credit checks are performed by the Oracle Order Management public API `OE_EXTERNAL_CREDIT_PUB.CHECK_CREDIT`. For more information, see the *Oracle Order Management Suite Implementation Manual*.

To perform internal credit checks, you must:

- Ensure that the customer is enabled for credit checks.

You must enable the Credit Check flag in the Profile Transactions tab for the customer in Oracle Receivables. See the *Oracle Receivables User Guide* for more information.

- Set credit limits.

In Oracle Receivables, you can set up overall credit limits and order credit limits. These limits can be set on two levels: customer and site. Site level, which pertains to the bill-to address, takes precedence over the customer level limit, if both are set. See the *Oracle Receivables User Guide* for more information.

- Define credit check rules in Oracle Order Management.

Define credit checking rules to help determine credit worthiness of customers and to specify if freight and special charges are included during credit checks.

4.20.1.1 Defining Credit Check Rules

You designate the credit check rule used for performing credit checks in the profile option **ASO: Credit Check Rule**. This is an optional profile, but if it is not set, users cannot perform internal credit checks. See [Section A, "Oracle Quoting Profile Options"](#) for more information.

The credit check rule definition allows you to determine if freight and special charges are included during credit checks. The quote total passed to Oracle Order Management is based on the setting of the credit check rule. There are two flags available when you set up a credit check rule:

- **Include Freight and Special Charges** — If set, the quote total passed to the API includes shipping and freight charges. If not set, the quote total excludes shipping charges and freight charges.
- **Include Tax** — If set, the quote total passed to the API includes the total tax amount. If not set, the quote total excludes tax.

Login

Login to Oracle Forms.

Responsibility

Order Management Super User

Prerequisites

None

Steps

1. Follow the procedure described in the *Oracle Order Management Implementation Guide* for complete information on defining credit check rules.

Note: Credit Check Rules must be at the order level, not the line level. When setting up your credit check rules, ensure that each rule has a Credit Check Level of **Sales Order**. Ensure that the Check Item Categories checkbox is not checked for the credit check rule. Also, the Send Hold Notifications flag must not be enabled for the credit check rule.

2. To include the shipping and freight charges on the quote and on uninvoiced orders in the credit check calculation, you must select the Freight and Special Charges checkbox.
3. To include the tax for the quote and uninvoiced orders in the credit check calculation, you must select the Include Tax checkbox.

4.20.2 External Credit Check

External credit checks are configurable by the application developer and allow users to make calls to non-Oracle applications. The credit check can be configured by writing code for the pre-hook and post-hook in the Quoting public API, **ASO_CREDIT_CHECK_PUB.CREDIT_CHECK**. For more information on the credit check API, refer to the *Oracle Order Capture Foundation API Reference Manual*. The pre-hook is executed prior to the internal credit check and the post-hook is executed after the internal credit check. Oracle Quoting customers can use these hooks to invoke the external credit checking.

For user hooks to work properly, the following SQL scripts must run:

- **asocruhk.sql** — The Populate Script populates data into the JTF_USER_HOOKS table. This script is run automatically.
- **asoenuhk.sql** — The Enabling Script enables or disables the user hook based on the parameter passed. You must execute this script.

Populate Script

This script populates the following user hooks in the JTF_USER_HOOKS table:

- Customer Pre Hook
- Customer Post Hook

Enabling Script

This script updates the Execute flag in the JTF_USER_HOOKS table for a particular hook, thereby enabling or disabling the user hook.

Parameters

This script accepts the following parameters:

Package Name — Name of the package that contains the user hook calls: ASO_CREDIT_CHECK_PUB.

API Name — Name of the procedure within the package which contains the user hook calls: CREDIT_CHECK.

Processing Type — The following processing types are supported: pre and post. Valid values are B (pre processing) or A (post processing).

Hook Type — The following type is supported: Customer. Valid value is C (customer).

Enabled Flag — Enabling user hooks. Valid values are Y or N.

4.20.3 Implementing User Hooks

To implement user hooks, you must:

1. Populate the JTF_USER_HOOKS table
2. Enable User Hooks
3. Disable User Hooks

4.20.3.1 Populating the JTF_USER_HOOKS table

The Populate script automatically runs against the database, when you install the patch, and populates the JTF_USER_HOOKS table.

4.20.3.2 Enabling User Hooks

To enable user hooks:

1. Run the Enabling script against the database. This script enables one user hook at a time. It is only necessary to run this script to enable the desired hook.
2. Enter each parameter. For enabling user hooks with the ENABLE parameter, the value should be Y.
3. You must implement the **hook package** when the corresponding hook is enabled.

4.20.3.3 Disabling User Hooks

To disable user hooks:

1. Run the Enabling script against the database. This script disables one user hook at a time. It is only necessary to run this script to disable the desired hook.
2. Enter each parameter. For disabling the user hook with the ENABLE parameter, the value should be N.

4.21 Setting up Sales Supplement Templates

Sales Supplement allows the capture of additional quote-specific information that is not passed into Oracle Order Management.

Once setup is complete in the Forms UI, Sales Supplement information is accessible to sales representatives in the HTML UI. You cannot view Sales Supplement information in the Forms UI. Sales Supplement functionality is enabled using the profile option **ASO: Enable Sales Supplement**. For more information on this and other profile options, see [Appendix A, "Oracle Quoting Profile Options"](#).

The basic hierarchy of a Sales Supplement template is as follows:

A Template contains one or more sections. Within each section is a component-response set. For example, if the template is a questionnaire, within each section there is a related set of questions and predefined responses.

Note: You cannot delete templates, sections, components, or responses.

Component type and Response type are defined in the context of a component-response set. Although there are four component types, only a component type of *Question* can have associated responses. There are five types of responses:

- Predefined Responses — Supports user selection from predefined text
- Text — Supports end user input
- Currency — Supports end user input
- Number — Supports end user input
- Date — Supports end user input

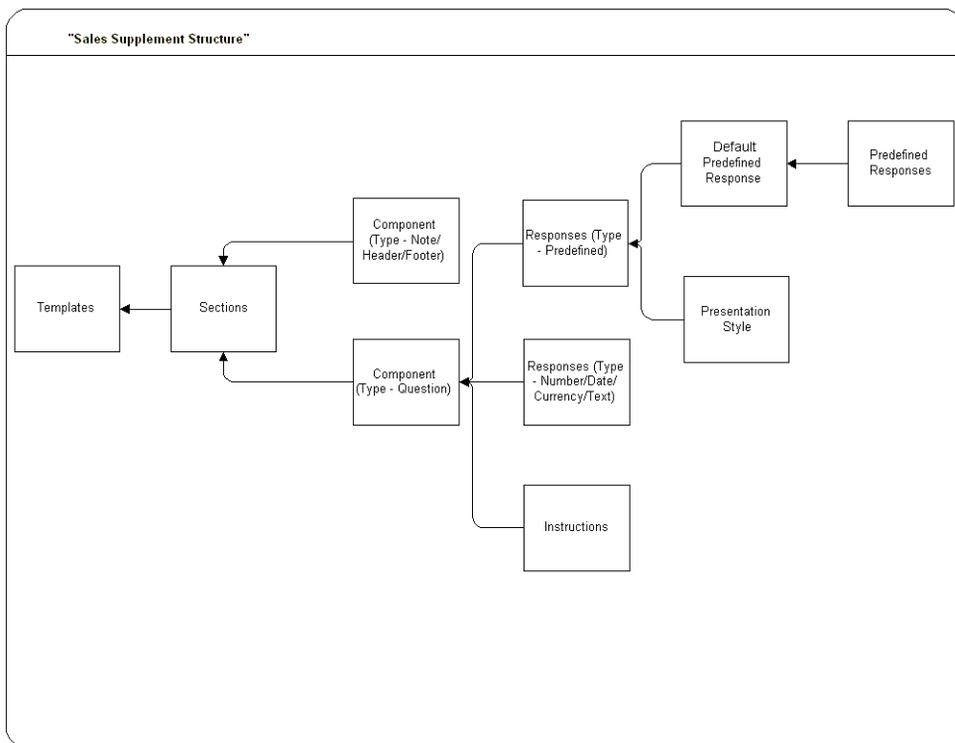
The response type Predefined Responses is associated with Presentation Styles. There are four Presentation Styles:

- List of Values
- List of Values With Blank
- Radio Group
- Checkbox

Note: You can specify a default value along with the presentation style. The default value is optional except when the presentation style is List of Values.

Default Value and Presentation Style are defined in the context of a section - component mapping to allow use of the same component - response set in different sections of one or more templates.

The following diagram shows the sales supplement structure and process flow.



Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Prerequisites

In order for HTML UI users to view the information you set up in this form, you must enable Sales Supplement by setting the profile option **ASO: Enable Sales Supplement** to **Yes**.

Steps

Note: Save your work in each tab.

1. Navigate to **Setup Sales Supplement Data**.
2. In the Responses tab, enter a name for the response.
3. Optionally, enter a description for the response and **Save**.
4. In the Components tab, enter a name for the component.
5. Optionally, enter a description for the component.
6. Use the LOV to select a component type.
Available component types are:
 - Note
 - Header
 - Footer
 - Question
7. If you selected Question as the Component Type, select a Response Type from the LOV.
The Response Type field is enabled only if the Type is Question. The following response types are available: Text, Number, Date, Currency, and Predefined Responses. The Responses are enabled only if the Component Type is Question and Response Type is Predefined.
 - a. Enter a sequence in the Responses.
 - b. Select a response from the LOV and **Save** the component.
The LOV lists all predefined responses.

8. Optionally, enter instructions for the component.
9. In the Sections tab, enter a name for the section.
10. Optionally, enter a description for the section.
11. Enter a sequence for the section component.
12. Select a component from the LOV.

Note: If you select a component type of Question that has predefined responses, you can designate a presentation style such as a Radio Group, Checkbox, List of Values, or List of Value with Blank.

13. Optionally, select a Default Value. Default value is required for the Presentation Style list of values.
14. Save the section.
15. In the Template tab, enter a name for the sales supplement template.
16. Optionally, enter a description for the template.
17. Enter the display sequence for the template sections.
18. Select a section from the LOV.
19. Save the template.

Note: You must manually query each tab. The tabs are not automatically queried. Each tab behaves as a standalone tab.

4.22 Modifying Seeded Lookup Types

For a complete list of the seeded lookup types in Oracle Quoting, refer to [Appendix B, "Seeded Lookup Types"](#).

To modify the seeded Lookup Types (QuickCodes):

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Prerequisites

None

Steps

1. Navigate to **Setup > Quick Codes**.

The Oracle Quoting Lookups window opens.

2. From the View menu, select **Query by Example > Run**.

The window displays all Oracle Quoting lookup types. Use the down arrow key to scroll through the list.

3. To search for all Oracle Quoting lookup types, enter a percent sign (wildcard) in the in the Type field.

4. To search for a specific lookup type, enter the lookup type name in the Type field.

5. From the View menu, select **Query by Example > Run**.

All Oracle Quoting lookup types display in the form. Use the down arrow key to scroll through the list.

4.23 Creating Additional Attachments Document Categories

Oracle Quoting currently supports one document category, **Miscellaneous**. This is the default for the Document Category field when you create a new attachment. You can create additional categories as needed.

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

4.24 Defining Descriptive Flexfield Information

Descriptive flexfields are customizable, blank fields on the Oracle Quoting form that allow the application developer to enter additional fields as needed. A descriptive flexfield is composed of segments, each of which has a prompt and may have either a valid set of values or data entered by the user.

In the Forms UI, descriptive flexfields are located in the main Quoting form, and in the Pricing view of the Quote Lines tab.

In the HTML UI, header level flexfields are located in the sidebar menu option **Additional Information**. Line level flexfields are accessed through the Lines page Action menu item **Specify Additional Information**. They are represented by an unnamed field enclosed in brackets.

For information on setting up and modifying flexfields, refer to the *Oracle Applications Flexfield Guide*.

Note: In order for flexfields to exist on the quote once it becomes an order, the application developer must set up the flexfields identically in Oracle Order Management. Repeat this procedure in the Oracle Order Management application to carry flexfields from quote to order.

4.25 Notes from Opportunities

Notes functionality is owned by Oracle JTT. Note types, used to categorize notes, can be mapped to one or more source objects. For example, a note type can be mapped to the source object **Sales Opportunity**, or **Sales Lead**. If a note type is mapped to a specific source object, it is available only from the source object(s). If a note type is not mapped to any particular source objects, it is available from all source objects.

Notes created in Oracle Sales Online or Oracle TeleSales may have different note types because they may be mapped to a source object specific to opportunities. When a salesrep creates a quote from an opportunity, notes should only be copied if they meet at least one of the following criteria:

- Note type is available to all possible sources—The note type was not mapped to a particular object.
- Note type is available to the seeded source object **Quoting**—The CRM Administrator mapped the note type to the Quoting source object (ASO_QUOTE).

For information on setting up and mapping note types, see the *Oracle Application Foundation Implementation Guide*.

4.25.1 Tasks From Opportunities (HTML only)

When sales representatives create tasks, they must specify task types. Task types are used to categorize tasks. JTT tasks functionality allows administrators to create task types as necessary.

Administrators have the option to map task types to source objects. For example, a task type can be mapped to the source object **Sales Opportunity** or **Sales Lead**. If a task type is mapped to a specific source object, it is available only from the source object(s). If a task type is not mapped to any particular source objects, it is available from all source objects.

Tasks created in Oracle Sales Online may have different task types because they may be mapped to a source object specific to opportunities. When a salesrep creates a quote from an opportunity, tasks should only be copied if they meet at least one of the following criteria:

- Task type is available to all possible sources—The task type was not mapped to a particular source object.
- Task type is available to the seeded source object **Quoting**—The CRM Administrator mapped the task type to the Quoting source object (ASO_QUOTE).

For information on setting up and mapping task types, see the *Oracle Application Foundation Implementation Guide*.

Part III

Post Implementation Tasks

This section of the Oracle Quoting Implementation Guide contains the following chapters:

- [Chapter 5, "Verify the Implementation"](#)
- [Chapter 6, "Diagnostics and Troubleshooting"](#)

Verify the Implementation

5.1 Oracle Quoting Implementation Verification Tasks

This chapter contains material useful in verifying the implementation of Oracle Quoting.

After you complete the configuration and setup of Oracle Quoting, verify that you can perform the following tasks.

5.1.1 Verification Task List

You must be able to complete these tasks successfully, or Oracle Quoting will not work properly.

For information on the procedures necessary to perform these tasks, see *Oracle Quoting User Guide*.

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

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

Diagnostics and Troubleshooting

This chapter contains material useful in diagnosing and troubleshooting the implementation of Oracle Quoting.

- [Overview of Diagnostics and Troubleshooting](#)
- [Frequently Asked Questions \(FAQs\)](#)
- [Common Errors](#)
- [How to Set up Debugging when Logging an iTar to Send to Support](#)

6.1 Overview of Diagnostics and Troubleshooting

The following sections provide assistance if you are having problems using Oracle Quoting. In addition, you can find additional FAQs and errors on Oracle MetaLink.

Note: The Oracle CRM Diagnostic Tool is useful in pinpointing problems with the setup and configuration of many CRM modules. It is available through the CRM System Administration Console.

6.2 Frequently Asked Questions (FAQs)

This section contains FAQs on recurrent issues encountered in Oracle Quoting.

6.2.1 Order Feedback Queue Frequently Asked Questions (FAQs)

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

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

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

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

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

Answer: Perform the following tasks:

- Log in to Oracle Forms using the Oracle Quoting Sales Manager responsibility and navigate to QuickCodes. Delete or disable all the lookup entries for lookup ASO_ORDER_FEEDBACK_CRM_APPS.

- Apply ARU bug 1449198 which drops the queue table and recreates it.

Question: The Install Base Interface Concurrent Program completes with an error status with a fatal exception from the:

```
ASO_ORDER_FEEDBACK_GET_PVT API. FND_AS_UNEXPECTED_ERROR (PKG_NAME=ASO_ORDER_FEEDBACK_GET_PVT) (PROCEDURE_NAME=GET_NOTICE) (ERROR_TEXT=ORA-00600: internal error code, arguments: [koxsi2sz1], [13], [], [], [], [], [], []).
```

What does this mean?

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

Question: Bug 1816891: Placing an order in OM or OC throws the error:

```
FND_AS_UNEXPECTED_ERROR (PKG_NAME=ASO_ORDER_FEEDBACK_UPDATE_PVT) (PROCEDURE_NAME=UPDATE_NOTICE) (ERROR_TEXT=ORA-25207: enqueue failed, queue ASO.ASO_OF_Q is disabled from enqueueing).
```

Why does this happen?

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

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

Question: Bug 1897375: Placing an order in OM or OC throws an error: 100501 - non-Oracle Exception. The debug file shows the error.

```
FND_AS_UNEXPECTED_ERROR (PKG_NAME=ASO_ORDER_FEEDBACK_UPDATE_PVT) (PROCEDURE_NAME=UPDATE_NOTICE) (ERROR_TEXT=ORA-06502: PL/SQL: numeric or value error: character to number conversion error).
```

Why does this happen?

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

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

Question: Is there a way to delete unnecessary records from ASO_ORDER_FEEDBACK_T table?

Answer: You need to run the script **asoclofq.sql** from \$ASO_TOP/patch/115/sql area. This script requires the input parameter: **application_short_name**. The application_short_name has to match the lookup entry defined in the ASO lookup **ASO_ORDER_FEEDBACK_CRM_APPS**. This script will remove all records in the table for the application specified.

6.2.2 Can you set up approvals at the line level?

Question: We require approval at the quote line level because we have different approval levels for different price limits. If the lines have different prices, how can we approach this scenario as the quote needs to be approved by different approvers? Can we setup rules that designate that an approver can only approve lines under his limit?

Answer: Yes. You can specify that a rule evaluate the quote at the header or line level. In this particular case, the rule is set up to evaluate the line level. Therefore, each line is evaluated and approvers are determined accordingly. The approvers for each line are merged and ranked in hierarchical order to determine the candidate list of approvers for all lines.

We would set up this scenario as follows:

- Level 1 has authority to approve discounts up to 10%
- Level 2 has authority to approve discounts up to 20%

A quote has one line with a 5% discount and a second line with 15% discount. The quote would be sent to both Level 1 and Level 2 for approval.

6.2.3 Why is some Opportunity line information not carried over to Oracle Quoting when a new quote is created?

Question: When a customer creates a quote from an Opportunity, why isn't the line information from the Opportunity copied into the new quote?

Answer: Lines default from the opportunity into the quote based on the following conditions. If the following conditions are not met, the quote is created without the line(s).

- If a product does not have a unit of measure (UOM) defined, the Opportunity-Quote API defaults to the Primary UOM_CODE from Inventory. If the Primary UOM_CODE is not defined in Inventory, the application shows an error message and then drops the line.
- If there is any pricing error before creating the quote, the application shows an error message and then drops the line.
- If a product in the Opportunity is non-customer orderable, the application shows an error message and then drops the line.
- If a product in the opportunity is a service item, the application shows an error message and then drops the item. The opportunity schema does not support the information required to create service items.
- If the opportunity contains a model product and there is no configurable UI defined for that model, the application shows an error message and then drops the line.
- If a product in the opportunity has an invalid quantity, the application shows an error message and then drops the line. We are calling the Inventory API to validate the quantity.

6.3 Common Errors

This section contains information on some of the common errors associated with Oracle Quoting.

If you have any problems using Oracle Quoting, first:

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

6.3.1 Error when Build Sourcing Rules

If you receive an error when you run **Build Attribute Mapping Rules** in Oracle Pricing Manager, you must bounce your middle tier.

Build Attribute Mapping Rules is a concurrent program that must be run before a new qualifier or source pricing attribute is used for the first time. For more information on the **Build Attribute Mapping Rules** process, refer to the *Oracle Pricing User's Guide*.

6.3.2 Unable to Place Order Without a Sold-to Contact

Problem:

The sold-to customer, Customer A, does not have a contact on the quote. A different customer, Customer B, and a contact for that customer, Contact B, were entered in either the Bill To or Ship To tab.

When you try to submit the quote, you get the following errors:

- Error message from Order Management
- Validation failed for the field - Contact
- There is an error in order submission

Fix:

This error occurs because OM defaulting rules for the Contact field state that if this field is blank, the value should default from the bill-to contact field or ship-to contact field. An error results because you cannot enter a contact from a different customer into the related Contact field.

To fix this problem, either:

- Enter a sold-to contact
- OR
- Go into Oracle Order Management and delete the defaulting rules for the Contact field.

6.3.3 No Workflow Assigned to This Line Type Error

Problem:

Customer receives an error when attempting to add a line type to a quote.

Fix:

Assign or verify that workflow is assigned to the Transaction Type selected in the **ASO: Default Order Type** profile option. This procedure is performed in Forms using the Order Management responsibility. See [Section 2.4.8, "Setting up Oracle Order Management"](#) for more information.

6.3.4 Quote Status Remains Contract Pending When Contract is Canceled

Problem:

When user cancels a contract, the quote status does not change to Contract Canceled. It stays in Contract Pending status.

Fix:

Run the Workflow Background Process as described in [Section 8.1.4, "Run background processes"](#).

6.3.5 Report Output is Not Formatted Properly

Problem:

When attempting to Create Printable Quote, the user receives the following error:

Error: The requested URL was not found, or cannot be served at this time.

Oracle Reports Server CGI - Key "REP60_Database SID" is unrecognized.

Possible causes: bad URL syntax; key in URL was not found in key map file.

Fix:

1. Designate a value for the profile **ICX: Report Server**.

A valid file with a standard file name, cgicmd.dat, is located in the ORACLE_HOME\REPORT60 directory on the Web server machine. This file contains a key map defined to simplify or hide parameters in your URL request. Enter this key as profile value of **ICX: Report Server**.

For more information, see *Oracle Reports Developer - Publishing Reports*.

2. Set the profile **ASO: Print Quote Reports Directory** to <content of \$ASO_TOP>/reports (specifying the absolute path, not the variable.)
3. Bounce the web server.

6.3.6 Can Only Generate Quote Print Outs in HTML Format

Problem:

When printing quotes from Oracle Quoting, quotes will only print in HTML format.

Fix:

Remove `desformat=html` from the `@ <SID>_APPS:server=Rep60_<sid>userid=APPS/<APPS user passwd>@<sid> destype=cache desformat=html` line in the `CGIcmd.dat` file.

6.3.7 Note Types for Quote are Different Than Opportunity

Problem:

When you create an opportunity and add a note, then convert the opportunity into a quote, the note type choices are different. The note from the opportunity appears in the quote, but the note type list is different.

Fix:

Oracle Quoting and Oracle TeleSales or Oracle Sales Online do not necessarily share note types. Therefore, if you are integrating with Oracle TeleSales or Oracle Sales Online and you want Oracle Quoting to have the same note types, you must map the note types to Quoting.

Steps

1. Follow the instructions in the *Oracle CRM Application Foundation Implementation Guide* for mapping note types to source.
2. In the Source field, enter `Quoting`.
3. In the Note Type field, select the note type you want to show up in Oracle Quoting.
4. Repeat this procedure for all note types you want to appear in Quoting.

6.3.8 No ATP Information Shows up in the Availability Form

Problem:

When user performs an availability check for items in the quote, there is no availability information.

Fix:

If availability information is missing for all items, check that you properly set up:

- Option settings
- ATP Rule Settings
- ATP Rule to Organization assignments

If availability information is missing for some items, then ATP may not be enabled for these items. Check the ATP setup for items and BOM items.

If availability information is missing for configured items and their components, ATP may not be enabled for Bills of Material structure for the models. Check the ATP setup for BOM models.

6.4 How to Set up Debugging when Logging an iTar to Send to Support

To set up debugging in Oracle Quoting:

6.4.1 Setting Up Debug File Location

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

Steps

1. Ensure that the Oracle Order Management profile **OM: Debug Log Directory** is set.
2. The profile value must be one of the directories listed in the `utl_file_dir` parameter in the `init.ora` file.

6.4.2 How to Use Debugger From the Oracle Quoting Main Form

To employ the debugger in the main Oracle Quoting form:

Steps

1. Check **ASO Debug** under Tools menu.
2. Check that the profile **ASO: Enable ASO Debug** is set to **Yes** at the user level.
3. Check that the profile **OM: Debug Level** is set to **10** at the site level.
4. The profile **QP: Debug** must to be set to **Yes**.
5. The profile **Tax: Debug Flag** must be set to **Yes**.
6. The profile **Tax: Debug File Directory** must be set and the value must match one of the directories mentioned in `utl_file_dir_param` in the `init.ora` file.
7. Note the debug file name and location.
8. Execute the steps necessary to reproduce the bug.

The debug file is generated in the directory specified in the Oracle Order Management profile **OM: Debug Log Directory**.

6.4.3 How to Use Debugger in SQL Scripts

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

Steps

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

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

2. Execute the SQL script to reproduce the bug.
3. Note the debug file name and location.
4. The debug file is generated in the directory specified in the Oracle Order Management profile `OE_DEBUG_LOG_DIRECTORY`.

Part IV

Integration of Oracle Products

This section of the Oracle Quoting Implementation Guide contains the following chapters:

- [Chapter 7, "Integrating Oracle Quoting With Oracle Approvals Management"](#)
- [Chapter 8, "Integrating Oracle Quoting With Oracle Sales Contracts"](#)

Integrating Oracle Quoting With Oracle Approvals Management

This section contains information on integrating with Oracle Approvals Management and setting up approvals functionality.

[Setting Up Approvals Functionality](#)

7.1 Setting Up Approvals Functionality

If you choose to implement the Approvals functionality there are a number of setup steps you must complete.

1. Set up all Approvals quote statuses.

Oracle Quoting requires that you set up additional quote status transitions if you choose to use Approvals. You must set up the following transition statuses:

- Draft to Approval Pending
- Approved to Order Submitted
- Approval Rejected to Approval Pending
- Approval Canceled to Approval Pending
- Approved to Draft

2. Set the Approvals profile options.

For information on the Approvals profile options, refer to [Appendix A, "Oracle Quoting Profile Options"](#).

3. Set up conditions and rules in Oracle Approvals Management (OAM).

A rule requiring approval is defined using attributes, conditions, and approval type. Attributes are used to define Conditions. One or more conditions and an approval type constitute a rule.

The seeded attributes for Quoting are available in [Table D, "Seeded Attributes in Oracle Approvals Management \(OAM\)"](#).

For information on setting up rules and conditions in OAM refer to the *Oracle Approvals Management Implementation Guide*.

4. Set up the default roles and responsibilities for user types.

Oracle iStore requires use of the following user types:

- Business User
- End User

You must define the default roles and responsibility for these role types through Oracle CRM Foundation's User Management framework. For information refer to the latest version of the *Oracle CRM Technology Foundation User Guide*.

Integrating Oracle Quoting With Oracle Sales Contracts

This section contains information on integrating with Oracle Sales Contracts and setting up contracts functionality.

[Setting up Contracts Functionality](#)

8.1 Setting up Contracts Functionality

Oracle Quoting integrates with Oracle Sales Contracts to provide contract functionality. The objective of Quoting/Contracts integration is to automate the creation and delivery of quotes with default or negotiated terms.

Note: If a contract is canceled, you must run the Workflow Background Process, with parameters **Contract Approval** and **Contract Alert**, to enable the quote status to change from **Contract Pending** to **Contract Canceled**.

In order to integrate Oracle Sales Contracts with Oracle Quoting, you must perform the following:

- [Set up Oracle Quoting profile options](#)
- [Set Contracts profile values](#)
- [Set up an Independent Condition](#)
- [Run background processes](#)
- [Setup workflow notification mailer](#)

8.1.1 Set up Oracle Quoting profile options

To enable use of Oracle Sales Contracts in Oracle Quoting, set the profile option **ASO: Enable Use Contracts**. For more information on setting Oracle Quoting profile options, refer to [Chapter 4.2, "Setting System Profile Options"](#).

8.1.2 Set Contracts profile values

You must set specific Oracle Contracts Core profile options in order to use Oracle Sales Contracts with Oracle Quoting.

For more information on Oracle Contracts Core profile options, refer to [Appendix A.3, "Oracle Contracts Core Profile Options"](#) and the *Oracle Contracts Core Implementation Guide*.

8.1.3 Set up an Independent Condition

To enable the quote status change to **Contract Canceled**, when the associated contract is canceled, you must set up an independent condition in Contracts. See *Oracle Contracts Core Concepts and Procedures* for more information.

Login

Login to Oracle Forms.

Responsibility

Contracts Manager

Prerequisites

None

Steps

1. Navigate to **Contract Events > Define Independent Condition**.
2. Enter a name for the condition.
3. Select **Contract Status Change From LOV** from the Action LOV.
4. In the Expression tab, select **CONTRACT CURRENT STATUS CODE** from the Left Value LOV.
5. Select = from the Operator drop down menu.
6. Select **CANCELED** from the Right Value LOV.
7. In the Notifications tab, select **Notify Sales Rep** from the Outcomes LOV.
8. Select **Parameters**.
9. Holding down the Control key, select the following three parameters:

P_CONTRACT ID

P_CONTRACT STATUS

P_API_VERSION

10. In the Parameters form, set the selected parameters as follows:

P_CONTRACT ID = CONTRACT ID

P_CONTRACT STATUS = CONTRACT CURRENT STATUS CODE

P_API_VERSION = 1

11. Select **OK**.
12. Select the save icon.

8.1.4 Run background processes

For complete information on Workflow Background Engines, refer to the *Oracle Workflow Guide*.

To run background processes:

Login

Login to Oracle Forms.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Run the **Workflow Background Engine** as described in the *Oracle Workflow Guide*.
2. Select **Contract Approval** and **Contract Alert** as the Item Types.
3. Select **Yes** from the Process Deferred LOV.
4. Select **Yes** from the Process Timeout LOV.

8.1.5 Setup workflow notification mailer

The Workflow Background Process must be running to enable:

- Contracts alerts to be sent
- Contract Approval process

For detailed instructions on setting up the Workflow Notification Mailer, refer to the *Oracle Workflow Guide*.

To verify that the Workflow Background Process is running:

Login

Login to Oracle Applications.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Verify if **Workflow Background Process** is running using the procedure defined in the *Oracle Workflow Guide*.
2. Select **Contract Alert** as the Item Type.
3. Select **Yes** from the Process Deferred LOV.
4. Select **Yes** from the Process Timeout LOV.
5. The Request screen should return a list of subsequent requests that were entered or completed for the Workflow Background Processes. If you are able to see these entered or completed workflows, the Workflow Background Process is running successfully.

8.1.5.1 If the Workflow Background Process is not Running Properly

If the Workflow Background Process is not running, you can run the process manually or schedule the process to run automatically. See the *Oracle Workflow Guide* for more information.

Part V

Appendixes

This section of the Oracle Quoting Implementation Guide contains the following chapters:

- [Appendix A, "Oracle Quoting Profile Options"](#)
- [Appendix B, "Seeded Lookup Types"](#)
- [Appendix C, "Oracle Quoting Security Scenarios"](#)
- [Appendix D, "Seeded Attributes in Oracle Approvals Management \(OAM\)"](#)
- [Appendix E, "Oracle Quoting Seeded Caches"](#)

Oracle Quoting Profile Options

This chapter describes required profile option settings. Topics include:

- [Current Profile Options](#)
- [Oracle CRM Foundation Profile Options](#)
- [Oracle Contracts Core Profile Options](#)
- [Oracle Order Management Profile Options](#)
- [Oracle Pricing Profile Options](#)
- [Oracle Sales Online Profile Options](#)
- [Oracle TeleSales Profile Options](#)
- [Multi Organization \(MO\) Profile Options](#)
- [Oracle iStore Profile Options](#)
- [Oracle Self Service Web Applications Profile Options](#)

A.1 Current Profile Options

When implementing Oracle Quoting, you must set specific profile options. Profile Options affect the appearance and performance of the application.

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

If you are using Quoting standalone, you should set profile options to either ASO for the Forms UI, or QOT for the HTML UI at the Application level.

If you are integrating with Oracle TeleSales or Oracle Sales Online, you should set profile options to either AST for the Forms UI or AST for the HTML UI, at the Application level.

For multi-org applications, it is required that all org-stripped profile options are set at either the responsibility or user level. The following profiles are org-stripped:

- **ASO: Default Salesrep**
- **ASO: Default Order Type**
- **OKC: Contract Template for Standard Terms and Conditions**

A.1.1 Oracle Quoting Profile Options for Approvals

The following profile options apply to Approvals functionality.

1. ASO: Enable Approvals

Determines availability of approvals functionality.

If set to **Yes**, approvals functionality is enabled.

If set to **No**, approvals functionality is disabled.

2. ASO: Allow Skip Approvers

Determines if the sales representative can skip approvers in the approval process.

If set to **Yes**, the sales representative can skip approval levels when submitting a quote for approval.

If set to **No**, all approvers must approve the quote.

The following tables list default values and application levels for the Approvals profile options.

Table A-1 Oracle Quoting Profile Options for Approvals

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Approvals	Yes	Both	Site, Application
ASO: Allow Skip Approvers	No	Both	Site, Application

A.1.2 Oracle Quoting Profile Options for Availability to Promise (ATP)

The following profile options apply to ATP functionality.

1. ASO: ATP Use Sourcing Rule

Determines if sourcing rules are used to derive the relevant inventory organizations for ATP.

Sourcing rules are defined in Materials Requirements Planning (MRP). Please refer to the *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User Guide Release 11i*.

If set to **Yes**, ATP is calculated based on sourcing rules.

If set to **No**, the sourcing rules are not used and the ATP check is restricted to the inventory organization specified in the profile **ASO: Default Ship From Org**.

If null, then the default value NO is assumed.

2. ASO: ATP Default Customer and ASO: ATP Default Ship To Site

These profiles are set to a cust_account_id and cust_account_site_use_id (where site_use = Ship_To) values respectively. They are used to determine the sourcing rules, when no ship-to site exists for the quote. These profiles must be used in conjunction with each other.

If ATP is performed before selecting a ship-to site, these default values are used. If a ship-to site is selected, then the cust_account_site_use_id is used for the ATP check only if the selected site is known to MRP. If MRP is not aware of the selected ship-to site, then the cust_account_id and the cust_account_site_use_id specified in these profiles is used.

If MRP is aware of the customer and ship-to site, but there is no sourcing rule for the combination of customer and ship-to site, then a Global Sourcing Rule or a sourcing rule at the Item level must exist for ATP to work.

Note: Do not attempt to set these profiles if **ASO: ATP Use Sourcing Rule** is set to **No**.

A value for these profiles is mandatory when **ASO: ATP Use Sourcing Rule** is set to **Yes**.

If these profile values are null, no default values are assumed.

3. ASO: Default Ship From Org

Identifies the physical warehouse against which ATP and reservation are performed.

Mandatory if ATP and Reservations are performed.

If null, no default value is assumed.

The following tables list default values and application levels for each of the ATP profile options.

Table A-2 Oracle Quoting Profile Options for ATP

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: ATP Default Customer	N/A	Both	Site, Application, Responsibility
ASO: ATP Default Ship To Site	N/A	Both	Site, Application, Responsibility
ASO: ATP Use Sourcing Rule	No	Both	Site, Application, Responsibility
ASO: Default Ship From Org	N/A	Both	Site, Application, Responsibility, User

A.1.3 Oracle Quoting Profile Options for Configurator

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

The following profile options apply to Oracle Configurator integration.

1. ASO: Allow Quantity Updates for Top Level Model Item

Determines if users can update the quantity of a top level model.

If set to **Yes**, the user can change the quantity.

If set to **No**, the user cannot change the quantity and the quantity becomes read only.

If null, defaults to **Yes**.

2. ASO: Allow Quantity Updates for Component Item

Determines if users can update the quantity for a component of a model or delete the component.

If set to **Yes**, a user can update the quantity or delete the component.

If set to **No**, a user cannot update quantity or delete the component.

If null, defaults to **Yes**.

3. ASO: Configurator URL

Specifies the URL for the Configurator window.

Mandatory if Oracle Configurator is used for product configurations.

If null, no default value is assumed.

The following table lists default values and application levels for the Configurator profile options.

Table A-3 Oracle Quoting Profile Options for Configurator

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Allow Quantity Updates for Top Level Model Item	Yes	Both	Site, Application

Table A-3 Oracle Quoting Profile Options for Configurator

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Allow Quantity Updates for Component Item	Yes	Both	Site, Application
**ASO: Configurator URL	N/A	Forms	Site, Application, Responsibility, User

A.1.4 Oracle Quoting Profile Options for Contracts Integration

The following profile options apply to Oracle Contracts Core integration.

1. ASO: Enable Use Contracts

Enables Oracle Quoting integration with Contracts Core.

If set to **Yes**, Contracts integration is enabled.

If set to **No**, Contracts integration is disabled.

If null, a default of **No** is assumed.

2. ASO: Enable to Instantiate Contract When Default Terms and Conditions Needed

Determines if a new contract is created at the time of order placement, if none exists.

The following table lists default values and application levels for each of the Contracts profile options.

Table A-4 Oracle Quoting Profile Options for Contracts

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Use Contracts	No	Both	Site, Application
ASO: Enable to Instantiate Contract When Default Terms and Conditions Needed	No	Both	Site, Application

A.1.5 Oracle Quoting Profile Options for Credit Checks

The following profile options apply to credit checks:

1. ASO: Enable Credit Check

Determines if the credit check functionality is enabled.

If set to **Yes**, users can initiate credit checks.

If set to **No**, users cannot initiate credit checks.

If null, defaults to **No**.

2. ASO: Credit Check Rule

Determines the credit check rule used for performing the internal credit check.

If not set, internal credit checks cannot be performed.

The following table lists the default values and application levels for the Credit Check profile options.

Table 8–1 Oracle Quoting Profile Options for Credit Checks

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Credit Check	N/A	Both	Site, Application
ASO: Credit Check Rule	N/A	Both	Site, Application, Responsibility

A.1.6 Oracle Quoting Profile Options for Debugging

The following profile option applies to debugging.

1. ASO: Enable ASO Debug

Enable the ASO debug messages for a single session.

If set to **Yes**, then ASO debug messages are recorded in the folder specified in Oracle Order Management's profile.

If set to **No**, then no debug file is recorded.

The following table lists the default value and application levels for the debugging profile option.

Table A–5 Oracle Quoting Profile Options for Debugging

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable ASO Debug	N/A	Both	User

A.1.7 Oracle Quoting Profile Options for Expiration Date

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

The following profile options apply to the expiration date.

1. ASO: Default Expiration GL Calendar

Selects the General Ledger calendar used to determine the quote expiration date. Users can choose from all GL calendars set up in Accounts Receivable.

If set to **None**, no calendar will be used.

2. ASO: Default Expiration Period Type

Selects the General Ledger period type used to determine the quote expiration date. Users can choose from all period types set up for the selected GL calendar in Accounts Receivable.

If set to **None**, no period type will be used.

3. ASO: Quote Duration

Specifies the minimum length of time (in days) a quote remains valid. Oracle Quoting uses this value to calculate the Expiration Date if the user does not specify one.

Note: This profile is only considered if **ASO: Default Expiration GL Calendar** and **ASO: Default Expiration Period Type** are not set.

If null, a duration of **30** days is assumed.

The following table lists default values and application levels for each of the expiration date profile options.

Table A-6 Oracle Quoting Profile Options for Expiration Date

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Expiration GL Calendar	None	Both	Site
ASO: Default Expiration GL Period Type	None	Both	Site

Table A-6 Oracle Quoting Profile Options for Expiration Date

Profile Option	Default Value	HTML or Forms UI	Application Level
**ASO: Quote Duration	30	Both	Site, Application, Responsibility, User

A.1.8 Oracle Quoting Profile Options for Inventory

The following profile option applies to inventory.

1. ASO: Enable Manual Warehouse Selection

Allows the user to enable or disable the Warehouse field in the Quote Lines tab and the Save Warehouse checkbox on the Availability form.

If set to **Yes**, the Warehouse field and Save Warehouse button are enabled.

If set to **No**, the Warehouse field and Save Warehouse button are disabled.

The following table lists the default value and application levels for the inventory profile option.

Table A-7 Oracle Quoting Profile Options for Inventory

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Manual Warehouse Selection	No	Forms	Site, Application, Responsibility, User

A.1.9 Oracle Quoting Profile Options for Manual Discounts

The following profile option applies to manual discounts.

1. ASO: Discounting Privilege

Allows the user to make manual adjustments to the price returned from the pricing engine.

If set to **Full**, the user can manually adjust a price by changing the Unit Selling Price in the Oracle Quoting UI. The user can add non-automatic adjustments and can also override the value if the override flag is checked in Oracle Advanced Pricing.

If set to **Partial**, the user can only select non-automatic adjustments. This value applies only to the Forms UI.

If set to **None**, the user cannot manually adjust a price by changing the Unit Selling Price in the Oracle Quoting UI and cannot apply any non-automatic adjustments.

If null, a default of **None** is assumed.

2. ASO: Require Minus Sign for Manual Discount

Determines the format for entering manual discounts and surcharges on the Lines page (HTML UI).

If set to **Yes**, a positive number is applied as a surcharge, increasing the Unit Selling Price. A negative number is applied as a discount, decreasing the Unit Selling Price.

If set to **No**, a positive number is applied as a discount, decreasing the Unit Selling Price and a negative number is applied as a surcharge, increasing the Unit Selling Price.

If null, a default value of **No** is assumed.

The following table lists the default value and application levels for the manual discounts profile option.

Table A-8 Oracle Quoting Profile Options for Manual Discounts

Profile Options	Default Value	HTML or Forms UI	Application Level
ASO: Discounting Privilege	None	Both	Site, Application, Responsibility, User
ASO: Require Minus Sign For Manual Discount	No	HTML	Site

A.1.10 Oracle Quoting Profile Options for Orders

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

The following profile options apply to orders.

1. ASO: Default Order Type

Determines how the order will be processed in Oracle Order Management. Order types are set up in Oracle Order Management.

If null, no default value is assumed.

Note: Set up of this profile is mandatory for tax calculations and for using line types functionality.

2. ASO: Default Order State

Determines the order state, booked or entered, when the order is created from a quote.

If null, the default value of **booked** is assumed.

3. ASO: Default Return Reason

Default reason for item return, if no reason is specified by the customer.

Mandatory for all return lines.

If null, then no default value is assumed.

4. ASO: Default E-Business Order Screen

Specifies the default Sales for Communications order form launched when the user selects the Details button while viewing Orders in the Quote/Order tab of the Oracle TeleSales E-Business form.

5. ASO: Default E-Business Quote Screen

Specifies the default Sales for Communications quote form launched when the user selects the Details button while viewing Quotes in the Quote/Order tab of the Oracle TeleSales E-Business form.

6. ASO: OM Defaulting

Determines whether Oracle Order Management should default values, following Oracle Order Management rules, for the following order attributes, when creating an order from a quote:

- payment_term_id
- fob_code
- freight_terms_code
- shipment_priority_code

If set to **No** and a quote is created with null values for the above fields, the corresponding order shows these fields as null.

If set to **Yes** and a quote is created with null values for the above fields, the corresponding order will have values defaulted into the fields, using the Oracle Order Management defaulting rules.

7. **ASO: Order Feedback Queue Retention Time**

Determines the length of time, in seconds, that messages are retained in the order feedback queue.

Caution: It is very important that you enter a value for this profile.

Set the profile value to null, meaning that the message never expires, or to a large number. The setting depends on your business needs and the applications that are interested in the queued information.

If null, the message will be retained in the queue indefinitely.

For more information, see the Order Feedback FAQ in the *Oracle Quoting Implementation Guide*.

8. **ASO: Quote Conversion Type**

Specifies the currency conversion type used to derive the daily conversion rate from Oracle General Ledger if the **OM: Set of Books** profile currency for the order is different from the currency used to create the associated quote.

If null, no default value is assumed.

9. **ASO: Reservation Level**

Determines the level at which item reservations are performed. Items can be reserved manually, or automatically when the order is submitted.

Mandatory if reservations are performed.

Note: Quoting does not support the value **Automatic Reservation - Add to Cart**.

If set to **AUTO_ORDER**, a reservation is made when an order is placed.

If set to **MANUAL**, reservations must be entered manually in Oracle Order Management.

If null, a default value of **Manual** is assumed.

The following table lists default values and application levels for each of the orders profile options.

Table A-9 Oracle Quoting Profile Options for Orders

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default E-Business Order Screen	Order Organizer	Forms	Site, Responsibility
ASO: Default E-Business Quote Screen	Quoting	Forms	Site, Responsibility
*ASO: Default Order Type	N/A	Both	Site, Application, Responsibility, User
ASO: Default Order State	Booked	Both	Site, Application, Responsibility, User
**ASO: Default Return Reason	N/A	Both	Site, Application, Responsibility, User
ASO: OM Defaulting	No	Both	Site, Application
ASO: Order Feedback Queue Retention Time	N/A	Both	Site, Application
*ASO: Quote Conversion Type	N/A	Both	Site, Application, Responsibility, User
ASO: Reservation Level	Manual	Both	Site, Application, Responsibility, User

A.1.11 Oracle Quoting Profile Options for Oracle Sales Online (OSO) Integration

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

The following profile option applies to OSO integration.

1. ASO: Enable OSO Integration

Indicates whether OSO is integrated with Oracle Quoting.

If set to **Yes**, customer, contact, and address are displayed as hyperlinks to OSO.

If set to **No**, integration with OSO is not enabled.

Note: This profile is mandatory if the HTML UI is accessed through OSO.

The following table lists default values and application levels for the OSO integration profile option.

Table A-10 Oracle Quoting Profile Options for OSO Integration

Profile Option	Default Value	HTML or Forms UI	Application Level
**ASO: Enable OSO Integration	No	HTML	Site, Application

A.1.12 Oracle Quoting Profile Options for Payments

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

The following profile options apply to payments.

1. ASO: Credit Card Authorization

Determines whether the application does a credit card authorization when creating an order from a quote.

If set to **Yes**, the credit card is authorized when creating an order from a quote.

If set to **No**, no credit card authorization is performed.

If null, a default value of **No** is assumed.

2. ASO: Receipt Method

Determines the receipt method for credit card authorization.

Mandatory when **ASO: Credit Card Authorization** is set to **Yes**.

If null, no default value is assumed.

The following table lists default values and application levels for each of the payments profile options.

Table A-11 Profile Options for Payments

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Credit Card Authorization	No	HTML	Site, Application, Responsibility, User
**ASO: Receipt Method	N/A	HTML	Site, Application, Responsibility, User

A.1.13 Oracle Quoting Profile Options for Pricing and Tax

The following profile options apply to the pricing functionality.

1. ASO: Calculate Price

Determines when the products and services in the quote are priced. Possible values: automatic and manual.

If set to **Automatic**, the quote is priced automatically each time a price-affecting change is made.

If set to **Manual**, users can price the quote whenever they choose.

If null, defaults to **Automatic**.

Note: Setting **ASO: Calculate Price** to **Automatic** and **ASO: Calculate Tax** to **Manual** is not recommended and not supported. This is not a valid setup, and the tax calculation may be wrong.

2. ASO: Calculate Tax

Determines when tax is calculated for the quote. Possible values: automatic and manual.

If set to **Automatic**, the tax is calculated automatically each time a price-affecting change is made.

If set to **Manual**, users can calculate tax for the quote whenever they choose.

If null, defaults to **Automatic**.

3. ASO: Enable Batch Processing

Determines how the quote is priced. If you choose to price the quote interactively, you must wait while the quote is being priced. If the quote is priced via a batch process, you will be notified when the pricing call is complete.

The following table lists default values and application levels for each of the pricing profile options.

Table A-12 Profile Options for Pricing

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Calculate Price	Automatic	Both	Site, Application, Responsibility, User
ASO: Calculate Tax	Automatic	Both	Site, Application, Responsibility, User
ASO: Enable Batch Processing	No	Both	Site

A.1.14 Oracle Quoting Profile Options for Print Quote

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

The following profile options apply to the print quote functionality.

1. ASO: Company Report Logo

Indicates the location of the *gif* file used for the company logo.

2. ASO: Print Quote Reports Directory

Specifies the directory location for the report source files.

3. ASO: Print Quote Show Attachments

Determines if attachments associated with the quote may be printed during the print quote process.

If set to **Yes**, attachments can be printed.

If set to **No**, attachments cannot be printed.

If null, a default value of **Yes** is assumed.

The following table lists default values and application levels for each of the print quote profile options.

Table A-13 Oracle Quoting Profile Options for Print Quote

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Company Report Logo	N/A	Both	Site, Application, Responsibility
*ASO: Print Quote Reports Directory	N/A	Both	Site
ASO: Print Quote Show Attachments	Yes	Both	Site

A.1.15 Oracle Quoting Profile Options for Quote Templates

The following profile option applies to quote templates.

1. ASO: Manage Quote Template

Determines if a user can create, modify, or delete quote templates.

If set to **Yes**, the user can create, modify, and delete templates.

If set to **No**, the user has read only access to templates but can create quotes from templates.

If null, a value of **No** is assumed.

The following table lists the default value and application level for the quote templates profile option.

Table A–14 Oracle Quoting Profile Options for Quote Templates

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Manage Quote Template	No	HTML	Site, Application, Responsibility, User

A.1.16 Oracle Quoting Profile Options for Quotes

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

The following profile options apply to quotes.

1. ASO: Auto Account Creation

Determines if an account should be automatically created when the quote is updated.

If **Always**, and sold-to/ship-to/bill-to party without an active account is on a quote, an account is automatically created when user saves the quote. If a new party is created, an account is created simultaneously.

If **As Required**, and sold-to/ship-to/bill-to party on quote does not have a single active account, an account is created for each of these parties when the quote is web published, a new contract is initiated, or the quote is submitted to Oracle Order Management.

If **Place Order**, and sold-to/ship-to/bill-to party on quote does not have a single active account, an account is created for each of these parties when the quote is submitted to Oracle Order Management.

If null, defaults to **As Required**.

2. ASO: Automatic Numbering

Determines if the system automatically generates a quote number.

If set to **Yes**, a new quote number is generated by the system.

If set to **No**, the user must specify the quote number.

If null, a default value of **Yes** is assumed.

3. ASO: Category Set

Determines the category set for the Category drop down on the Search and Select: Product page (HTML UI).

Determines the category set used, if the user chooses to *Print Subtotals by Category* when printing a quote.

4. ASO: Default Currency Code

If null, the default value USD is assumed.

5. ASO: Default Customer Type

Determines the Customer Type (person or organization) field for the sold-to, bill-to, and ship-to customers.

If set to **Person**, the customer type defaults to person.

If set to **Organization**, the customer type defaults to organization.

6. ASO: Default Ordered Qty in OC UI

Determines the default quantity that appears in the QTY field of the Oracle Quoting window.

If null, a default quantity of 1 is assumed.

7. ASO: Default Quote Status

Determines the default status of a new quote.

8. ASO: Default Sales Channel

Determines the default sales channel for quotes if the Primary Sales Agent and Sales Group defaulted from **ASO: Default Salesrep** and **ASO: Default Sales Group**.

9. ASO: Enable Line Level Billing

Determines if you can designate billing information at the line level.

If set to **Yes**, you can designate billing information by line.

If set to **No**, you cannot designate billing information by line.

If null, a default value of **No** is assumed.

10. ASO: GSA Pricing

Allows users to check the GSA violation returned by the Pricing engine.

If set to **Warning**, the application checks for a GSA violation and returns a warning message to the user. The transaction continues.

If set to **Error**, the application checks for a GSA violation and returns an error message to the user. The transaction is stopped.

If null, GSA violation checks are ignored.

11. ASO: Max Number of Results

Determines the maximum number of search results displayed in the quote and customer searches, and all customer and account LOVs in the Forms UI.

If null, defaults to **100**.

12. ASO: Require Service Reference on Add to Quote

Determines when the user must complete the service reference form for a service item.

If set to **Yes**, the user must complete the service reference before adding a service item to the quote.

If set to **No**, the user may complete the service reference when adding the service to the cart or before placing the order.

If null, a value of **Yes** is assumed.

13. ASO: Show Line Level Tax Details

Determines if tax details are displayed at the line level.

If set to **Yes**, tax details will display at the line level if the item is taxable.

If set to **No**, tax details will not be displayed at the line level.

If null, a value of **No** is assumed.

The following table lists default values and application levels for each of the quote profile options.

Table A-15 Quoting Profile Options for Quotes

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Auto Account Creation	As Required	Both	Site, Application
*ASO: Automatic Numbering	Yes	Both	Site, Application, Responsibility
ASO: Category Set	NA	Both	Application

Table A-15 Quoting Profile Options for Quotes

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Currency Code	USD	Forms	Site, Application, Responsibility, User
ASO: Default Customer Type	Organization	HTML	Site, Application
ASO: Default Ordered Quantity in OC UI	1	Both	Site, Application, Responsibility, User
*ASO: Default Quote Status	Draft	Both	Site, Application
ASO: Default Sales Channel	N/A	Both	Site, Application, Responsibility, User
ASO: Enable Line Level Billing	No	Both	Site, Application, Responsibility
ASO: GSA Pricing	N/A	Both	Site, Application
ASO: Max Number of Results	100	Forms	Site, Application
ASO: Require Service Reference on Add to Quote	Yes	Forms	Site
ASO: Show Line Level Tax Details	No	HTML	Site, Application, Responsibility

A.1.17 Quoting Profile Options for Sales Supplement (HTML)

The following profile options apply to sales supplement functionality.

1. ASO: Default Sales Supplement Template

Sets the default sales supplement template.

2. ASO: Enable Sales Supplement

Determines if the sales supplement functionality is accessible to users.

If set to **Yes**, sales supplement is enabled.

If set to **No**, sales supplement information is not accessible to users.

If null, a value of **No** is assumed.

The following table lists default values and application levels for each of the sales supplement profile options.

Table A–16 Quoting Profile Options for Sales Supplement

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Sales Supplement	No	HTML	Site, Application
ASO: Default Sales Supplement Template	N/A	HTML	Site, Application, Responsibility, User

A.1.18 Oracle Quoting Profile Options for Searching

The following profile option applies to Search functionality.

1. ASO: Enable Intermedia Search

Determines if the product search (against the Product Catalog) uses Intermedia.

If set to **Yes**, the product search uses Intermedia.

If set to **No**, the product search uses the existing search tables/views.

If null, a default value of **No** is assumed.

The following table lists default value and application levels for the search profile option.

Table A-17 Quoting Profile Options for Sales Supplement

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Intermedia Search	No	Both	Site, Application

A.1.19 Quoting Profile Options for Security

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

The following profile options apply to Security functionality.

1. ASO: Create New Customer

Allows the user to create new customer information. In the Forms UI, enables or disables the Create Customer form. In HTML, allows the user to create new sold-to customers.

Note: In the Forms UI, new customers are created using the AR form. This form automatically creates a new account for each new customer. If you do not want user to create new accounts when creating new prospect customers, you must disable the Create Customer form by setting the profile option **ASO: Create New Customer** to **No**. Users can create new customers using the Create Customer form in the Oracle TeleSales E-Business Center.

If set to **Yes**, the user can create new customers.

If set to **No**, the user cannot create new customers.

If null, a default value of **Yes** is assumed.

2. ASO: Create New Shipping/Billing Customer

Determines if HTML users can create new shipping or billing customers.

If **Yes**, users can create new shipping and billing customers.

If **No**, users cannot create new shipping and billing customers.

If **null**, defaults to **Yes**.

3. ASO: Default Sales Group

Populates the primary sales representative group when the primary sales representative defaults from **ASO: Default Salesrep**. This group must be a sales group with the usage "Sales and TeleSales". Ensure that the selection is valid for the sales representative selected in **ASO: Default Salesrep**.

4. ASO: Default Salesrep

Provides a default sales representative on the quote, if the logged-in user is not a valid sales representative.

5. ASO: Enable Security Check

Determines whether Quote Access Security is enabled. Quote Access Security determines which quotes users can access and at what levels.

If set to **Yes**, users can access only those quotes belonging to a sales team they or one of their subordinates belong to. Limits user's access level as well.

If set to **No**, users have update access to all quotes.

If null, a value of **No** is assumed.

Note: If this profile is set to No, you should not set other Security profiles, as they do not work when security is turned off.

6. ASO: Enable Submit Button

Determines which users can submit orders.

If set to **Yes**, users can submit an order.

If set to **No**, the submit button is disabled and users cannot submit orders.

If null, a value of **Yes** is assumed.

7. ASO: Enforce Account Relationships

Determines if user can select only ship-to/bill-to customers with existing relationships to the sold-to customer.

If **Yes**, the user can only select ship-to or bill-to customers with existing relationships to the sold-to customer. In HTML UI, allows user to conduct a blank search for ship-to or bill-to customers.

If **No**, the user can select any ship-to or bill-to customer regardless if there is an existing relationship with the sold-to customer.

If null, defaults to **No**.

8. ASO: Manager Role Access

Determines what level of access a manager has to quotes.

If set to **Update**, the manager can update all quotes associated with the quote sales teams their subordinates belong to.

If set to **Inherit**, the manager has the same access as a subordinate on the quote sales team. If the manager has multiple subordinates with different access levels on a single sales team, the manager has the higher access level.

If null, a default value of **Inherit** is assumed.

9. ASO: New Quote Security

Controls the user's ability to create new quotes.

If set to **Yes**, the user cannot create new standalone quotes unless the quote is created from an opportunity.

If set to **No**, the user can create new standalone quotes. This includes copying existing quotes to new quotes and creating quotes from opportunities.

If set to **Sales Team**, the user can only create new quotes for customers if they belong to the customer's sales account team.

Note: Create customer sales teams using the Territory Manager module of Foundation, Oracle Sales Online or Oracle TeleSales.

10. ASO: OM Access

Determines the mode of access to Oracle Order Management forms via the Customer History form. Access can be Full or Read Only. These values are based on the lookup type ASO_OM_ACCESS_PRIVILEGE.

If set to **Full**, the user can update an order in the Oracle Order Management form.

If set to **Read Only**, the user can only view an order in the Oracle Order Management form.

If null, a value of **Full** is assumed.

11. ASO: Price List Override

Allows the user to select a different price list for a quote.

If set to **Yes**, the user is able to override the default price list selection.

If set to **No**, the user cannot override the default price list.

If null, a default value of **Yes** is assumed.

12. ASO: Require Group

Determines if a group selection is required for the Primary Sales Agent.

If set to **Yes**, the user cannot save the quote until a group selection is made.

If set to **No**, the user can save the quote without a group selection.

If null, a default value of **No** is assumed.

Note: If this profile option is set to Yes, setting up at least one group for each sales representative is mandatory.

13. ASO: Security Enable From API

Determines if security is enabled through the security APIs. This profile is mandatory if Security is enabled.

If set to **Yes**, the security APIs are enabled and Security functionality is accessible.

If set to **No**, the security APIs are not available and Security functionality is not accessible.

If null, a default value of **No** is assumed.

Note: This profile completely disables security. It is intended to improve application performance and should be set to **No** only if there are no users with security enabled through **ASO: Enable Security Check**. This profile must be set to **Yes** if you have any users with security enabled through **ASO: Enable Security Check**.

14. ASO: Status Override

Determines whether a user can update the quote while it is in a read-only status.

If set to **Yes**, user is able to override read-only data for quotes in read-only status.

If set to **No**, user cannot update data for quotes in a read-only status.

If null, a default value of **No** is assumed.

15. ASO: Update Customer

Allows the user to update existing customer information.

If set to **Yes**, user can update existing customer information.

If set to **No**, user cannot update existing customer information.

If null, a default value of **Yes** is assumed.

16. ASO: Update Sales Team

Allows user to manually update Sales Team information, including manual assignment of the primary sales agent.

If set to **Yes**, user is able to update primary sales representative and sales team information.

If set to **No**, the user cannot update primary sales representative and sales team information.

If null, a default value of **Yes** is assumed.

17. ASO: Validate Salesrep

This profile is used to determine whether a sales representative must be specified on the quote prior to creating an order.

If set to **Yes**, a sales representative must be specified on the quote prior to creating an order.

If set to **No**, a sales representative will be defaulted from **ASO: Default Salesrep**.

If null, a default value of Yes is assumed.

18. ASO: View Customers Without Accounts

Determines if the user can view only customers with at least one active account.

If **Yes**, a user can view all sold-to/ship-to/bill-to customers.

If **No**, user can view only sold-to/ship-to/bill-to customers with at least one active account.

If null, defaults to **Yes**.

The following table lists default values and application levels for each of the security profile options.

Table A-18 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Auto Account Creation	As Required	Both	Site, Application
ASO: Create New Customer	Yes	Both	Site, Application, Responsibility, User
ASO: Create New Shipping/Billing Customer	Yes	HTML	Site, application, Responsibility, User
ASO: Default Sales Group	N/A	Both	Site, Application, Responsibility, User
ASO: Default Salesrep	N/A	Both	Site, Application, Responsibility, User
ASO: Enable Security Check	No	Both	Site, Application, Responsibility, User

Table A-18 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Submit Button	Yes	Both	Site, Application, Responsibility, User
ASO: Enforce Account Relationships	No	Both	Site, Application, Responsibility, User
ASO: Manager Role Access	Inherit	Both	Site, Application, Responsibility, User
ASO: New Quote Security	No	Both	Site, Application, Responsibility, User
ASO: OM Access	Full	Forms	Responsibility, User
ASO: Price List Override	Yes	Both	Site, Application, Responsibility, User
ASO: Require Group	No	Both	Site
**ASO: Security Enable From API	No	Both	Site
ASO: Status Override	No	Both	Site, Application, Responsibility, User
ASO: Update Customer	Yes	HTML	Site, Application, Responsibility, User
ASO: Update Sales Team	Yes	Both	Site, Application, Responsibility, User
ASO: Validate Salesrep	Yes	Both	Site, Application, Responsibility, User
ASO: View Customers Without Accounts	Yes	Both	Site, Application, Responsibility, User

A.1.20 Quoting Profile Options for Trade-ins

The following profile option applies to trade-ins.

1. ASO: Enable Line Type

Allows the user to enter line types and categories.

If set to **Yes**, line types and categories can be entered in the Oracle Quoting UI.

If set to **No**, line types and categories cannot be entered and the default line category "ORDER" is in effect in the Oracle Quoting UI.

If null, a default value of **No** is assumed.

The following table lists the default value and application levels for the payments profile option.

Table A-19 Quoting Profile Options for Trade-ins

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Line Type	No	Both	Site, Application, Responsibility, User

A.1.21 Oracle Quoting Profile Options for Web Publishing

The following profile option applies to the web publishing functionality.

1. ASO: Enable Web Publishing

Enables web publishing functionality to Oracle iStore.

If set to **Yes**, the user can publish quotes.

If set to **No**, the user cannot publish quotes.

If null, a default value of **No** is assumed.

The following table lists default value and application levels for the web publishing profile option.

Table A–20 Oracle Quoting Profile Options for Publishing

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Web Publishing	No	Both	Site, Application

A.2 Oracle CRM Foundation Profile Options

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

The following table lists the CRM Foundation profile options that must be set during Oracle Quoting implementation.

Table A–21 JTT Profile Options for Quoting

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
*JTF_PROFILE_DEFAULT_APPLICATION	Determines the default application in the HTML UI.	N/A	HTML	Site, Application, Responsibility, User

Table A-21 JTT Profile Options for Quoting

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
*JTF_PROFILE_DEFAULT_CURRENCY	Determines the default currency in the HTML UI.	N/A	HTML	Site, Application, Responsibility, User
JTF_PROFILE_DEFAULT_NUM_ROWS	Determines the number of rows in the HTML UI.	N/A	HTML	Site, Application, Responsibility, User
JTF_PROFILE_DEFAULT_RESPONSIBILITY	Determines the default responsibility in the HTML UI.	N/A	HTML	Site, Application, Responsibility, User

A.3 Oracle Contracts Core Profile Options

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

The following table lists the Oracle Contracts Core profile options that must be set during Oracle Quoting implementation.

Table A–22 Contracts Core Profile Options for Quoting

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
**OKC: Contract Template for Standard Terms and Conditions	Determines the contract template for standard terms and conditions. Mandatory if ASO: Enable Use Contracts is set to Yes.	N/A	Both	Site, Application, Responsibility
OKC: Default Contract Administrator for Notifications	Determines which Contract Administrator receives notification when a sales representative requests contract creation from a quote.	N/A	Both	Site, Application, Responsibility

A.4 Oracle Order Management Profile Options

Specific Oracle Order Management profile options must be set during Oracle Quoting implementation. For more information on Oracle Pricing profile options, refer to the *Oracle Order Management Suite Implementation Guide*.

The following table lists the description and default value for the Order Management profile option that must be set during implementation.

Table A-23 Oracle Order Management Profile Options

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
OM: Use Configurator	Indicates which Oracle application software will be launched to enter configuration information. Should be set to Yes if a quote with model items will become an order.	No	Both	Site

A.5 Oracle Pricing Profile Options

Specific Oracle Pricing profile options must be set during Oracle Quoting implementation. For more information on Oracle Pricing profile options, refer to the *Oracle Pricing User's Guide*.

The following table lists the description and default value for the Pricing profile option that must be set during implementation.

Table A–24 Pricing Profile Options for Quoting

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
QP: Verify GSA Violations	<p>Indicates whether the pricing calculation engine should test for GSA violations.</p> <p>If set to Yes, Pricing tests for GSA violations.</p> <p>If set to No, Pricing does not check for GSA violations.</p> <p>Mandatory if ASO: GSA Pricing is set to Error or Warning.</p>	No	Both	Site

A.6 Oracle Sales Online Profile Options

If Quoting - HTML is integrated with Oracle Sales Online, specific Oracle Sales Online profile options must be set up during Oracle Quoting implementation. For more information on Oracle Sales Online profile options, refer to the *Oracle Sales Online Implementation Guide*.

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

The following table lists the description and default value for the OSO profile option that must be set up during implementation.

Table A-25 OSO Profile Options for Quoting

Profile Option	Description	Default Value	Application Level
**OSO: Default Sales Group and Role	A value for this profile option is mandatory if Quoting is accessed through OSO.	N/A	Site, Application, Responsibility, User

A.7 Oracle TeleSales Profile Options

If Quoting - Forms is integrated with Oracle TeleSales, specific Oracle TeleSales profile options must be set during Oracle Quoting implementation. For more information on Oracle TeleSales profile options, refer to the *Oracle TeleSales Implementation Guide*.

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

The following table lists the description and default value for the TeleSales profile option must be set during implementation.

Table A-26 TeleSales Profile Options for Quoting

Profile Option	Description	Default Value	Application Level
**OTS: Default User Role and Sales Group	A value for this profile option is mandatory if Quoting is accessed through Oracle TeleSales.	N/A	User

A.8 Multi Organization (MO) Profile Options

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

A.9 Oracle iStore Profile Options

The following Oracle iStore profile option must be set if you want to use web publishing. For more information on Oracle iStore profile options, refer to the *Oracle iStore Implementation Guide*.

- Set **IBE: iStore Non Secure URL** to **iStore URL** at the Application level

Note: If you are using the HTML UI and are integrated with Oracle Sales Online, you must set IBE: iStore Non Secure URL at the Application level for the application Oracle Field Sales. If you are not integrated with OSO, the profile should be set at the Application level for Oracle Quoting.

A.10 Oracle Self Service Web Applications Profile Options

The following profile option must be set if you want to print in Oracle Quoting. For more information, refer to the *Oracle Business Intelligence System Implementation Guide*.

Set **ICX: Report Server** to the key map value located in the file CGIcmd.dat. See [Section 4.12, "Setting Up the Print Quote Functionality"](#) for more information.

Seeded Lookup Types

If lookups have **System** level access you can modify the meaning and description.

If lookups have **User** level access, you can:

- Change the meaning and description
- Change the tag (sort sequence)
- Disable a lookup up

Note: Addition of new lookup codes is not supported under any circumstances, unless otherwise specified. If a lookup type is preceded by an asterisk, you can add new lookup codes to the lookup type.

Table B-1 lists descriptions and access levels for seeded Oracle Quoting Lookup Types (QuickCodes).

Table B-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_ACCOUNT_CREATION	Lookup for profile option ASO: Auto Account Creation .	System
ASO_APPROVAL_INSTANCE_STATUS	Status of an approval instance	System
ASO_APPROVER_STATUS	Status of an approver response	System
ASO_BATCH_PROCESSING_PHASES	Lists the batch processing phases.	System

Table B-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_CONFIGURATION_STATUS	Lists the product configuration statuses.	System
ASO_CUSTOMER_TYPE	Defines customer type for sold-to, bill-to, and ship-to customers	System
ASO_DEFAULT_ORDER_STATE	Default order state when quote passes to Oracle Order Management. Seeded values are Entered and Booked . Each triggers different Oracle Order Management validation.	System
ASO_DISCOUNTING_PRIVILEGE	Discounting privilege for manual discounting	System
ASO_ER_REFRESH_MODE	Quoting mode in which fact tables are refreshed	System
ASO_FORMS_ACTION	Lists the values for the Actions LOV in the Quoting form.	User
ASO_GSA_PRICING	Determines level of error message for GSA violation	System
ASO_IB_ACTION_TYPES	Types of actions that appear on the Search and Select: Installed Base Product page of the HTML UI.	User
ASO_IB_RELATIONSHIP_TYPES	Types of relationships that appear on the Installed Base Relationships page of the HTML UI.	User
ASO_ITEM_TYPE	Item types for items which are added to the cart	System
ASO_LINE_ACTION	Type of line actions that appear on the Lines page of the HTML UI.	User
ASO_LINE_ITEM_ACTIONS	Type of actions available in the Actions menu on the Lines page. HTML UI	User
ASO_OM_ACCESS_PRIVILEGE	Determines mode of access to the Oracle Order Management form via the Customer History form	System
ASO_ORDER_FEEDBACK_CRM_APPS	CRM applications registered for order feedback. All applications listed are informed of any changes to an order in Oracle Order Management.	User

Table B-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_PAYMENT_TYPE	Payment types available to users	System
*ASO_PQUOTE_TEMPLATES	Templates that are not organization specific are defined in this lookup	User
*ASO_PQUOTE_OUTPUT_FMT	Output format for print quote reports	User
ASO_PRICE_TAX_COMPUTE_OPTIONS	Lists the pricing and tax computation options.	System
ASO_PRICE_TAX_STATUS_INDICATOR	Lists the pricing and tax status indicators.	System
ASO_PRODUCT_SOURCE	Types of product sources available on the Search and Select Product page (THML UI).	User
ASO_QUOTE_ACTION	Types of actions available on the Overview page of HTML UI.	User
ASO_QUOTE_SECURITY	Provides values for the profile ASO: New Quote Security . The lookup codes here should not be changed.	System
ASO_QUOTE_SOURCE	Quote source	System
ASO_RESERVATION_TYPE	Determines values for level at which Reservation needs to be done	System
ASO_SAVED_SEARCH	Lists the saved searches in the HTML UI.	System
ASO_SECURITY_MGR_ROLE_ACCESS	Values for security profile ASO: Manager Role Access	System
ASO_SERVICE_TYPE	Service reference type code. A service must always be linked to an inventory item or an item in the customer install base. This list of values specifies where the item is. Seeded values include: Quote, Order, and Customer Product.	System
ASO_SERVICE_VALIDATION_TYPE	Validation used for ordering services on a quote.	System
ASO_SUP_COMPONENT_TYPE	Sales supplement data component type	System

Table B-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_SUP_PRESENTATION_STYLE	Sales supplement data presentation style	System
ASO_SUP_RESPONSE_TYPE	Sales supplement response type	System
ASO_SUP_SECTION_COMPONENT_TYPE	Sales supplement section component type	System

The following table lists the obsolete Oracle Quoting Lookup Types.

Table B-2 Obsolete Oracle Quoting Lookup Types

Lookup Type	Description
ASO_CONTACT_PROFILE_TYPE	Profile type of a customer contact
ASO_ORDER_LINE_STATUSES	Status of an order line
ASO_ORDER_STATUSES	Order status
ASO_PARTY_RELATIONSHIP_TYPE	Type of party relationship
ASO_NON_DEFAULT_CONTRACT	Approval level for non-default contract options
ASO_QUOTE_RELATED_OBJECTS	Seeded lookup data required for data migration in Sales
ASO_RETURN_FOR	Reasons for returns
ASO_UNIVERSAL_SEARCH	Types of universal search

Oracle Quoting Security Scenarios

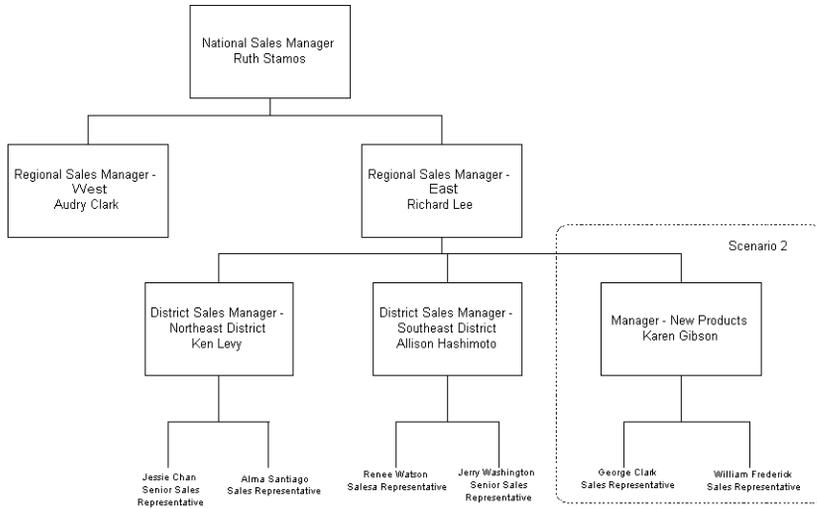
This section contains scenarios demonstrating uses for Oracle Quoting Security.

- [Scenario 1 — Organization Split Into Regions and Districts](#)
- [Scenario 2 — New Quote Security](#)
- [Scenario 3 — Call Center Environment](#)

C.1 Scenario 1 — Organization Split Into Regions and Districts

A national sales organization headed by Ruth Stamos is split into East and West regions with districts in the Eastern region.

The following diagram shows the hierarchy of the employees at the organization.



The following table lists the roles for the organization and the flags that should be selected for the role during set up.

Table C-1 Roles

Role	Flag
National Sales Manager	Manager
Regional Sales Manager	Manager
District Sales Manager	Manager
Sales Representative	Member
Senior Sales Representative	Member

Setup of this scenario requires the following steps:

1. Create a resource for each person.

The following table lists the resources set up for the organization.

Resource
Ruth Stamos
Audrey Clark
Richard Lee
Ken Levy
Allison Hashimoto
Karen Gibson
Jessie Chan
Alma Santiago
Renee Watson
Jerry Washington
George Clark
William Frederick

2. Create 5 roles.

The following table shows the roles set up for the company and the flags that must be enabled for each role during setup.

Table C-2 Roles

Role Name	Flag Selected
National Sales Manager	Manager
Regional Sales Manager	Manager
District Sales Manager	Manager
Sales Representative	Member
Senior Sales Representative	Member

3. Assign roles to resources.

The following table shows the roles assigned to each resource within the organization.

Table C-3 Assign Roles to Resources

Resource	Role
Ruth Stamos	National Sales Manager
Audrey Clark	Regional Sales Manager
Richard Lee	Regional Sales Manager
Ken Levy	District Sales Manager
Allison Hashimoto	District Sales Manager
Karen Gibson	District Sales Manager
Jessie Chan	Senior Sales Representative
Alma Santiago	Sales Representative
Renee Watson	Sales Representative
Jerry Washington	Senior Sales Representative
George Clark	Sales Representative
William Frederick	Senior Sales Representative

4. Create groups and parent/child relationships.

The following table lists the parent/child relationships for the groups for the organization.

Group	Parent of:
National Sales	Western Region, Eastern Region
Western Region	-
Eastern Region	Northeast District, Southeast District, New Products
Northeast District	-
Southeast District	-
New Products	-

5. Assign resources to groups.

The following table lists the resources assigned to each group.

Resource	Role	Group
Ruth Stamos	National Sales Manager	National Sales
Audrey Clark	Regional Sales Manager	Western Region
Richard Lee	Regional Sales Manager	Eastern Region
Ken Levy	District Sales Manager	Northeast District
Allison Hashimoto	District Sales Manager	Southeast District
Karen Gibson	District Sales Manager	New Products
Jessie Chan	Senior Sales Representative	Northeast District
Alma Santiago	Sales Representative	Northeast District
Renee Watson	Sales Representative	Southeast District
Jerry Washington	Senior Sales Representative	Southeast District
George Clark	Sales Representative	New Products
William Frederick	Senior Sales Representative	New Products

6. Check hierarchy.

Refer to the *Oracle CRM Application Foundation Concepts and Procedures* for information on accessing Resource Manager and group hierarchies.

a. Select **Ruth Stamos** from the Name LOV.

b. Select **All** from the View By LOV.

The Members section should show all resources in the organization.

c. Select **Direct Reports** from the View By LOV.

The Members section should only show Richard Lee and Audrey Clark.

Repeat this procedure for all resources.

C.2 Scenario 2 - Security Based on Profile Options

Senior Sales Representatives determine who works on each sale and can also change price lists and discounts. Managers can edit their subordinates' quotes.

Setup of this scenario requires the following steps:

1. Set profile options for users.

The following table lists the profile option settings for each resource.

Resource	Role	Profile Option
Ruth Stamos	National Sales Manager	Set ASO: Manager Role Access to Update
Audrey Clark	Regional Sales Manager	Set ASO: Manager Role Access to Update.
Richard Lee	Regional Sales Manager	Set ASO: Manager Role Access to Update.
Ken Levy	District Sales Manager	Set ASO: Manager Role Access to Update.
Allison Hashimoto	District Sales Manager	Set ASO: Manager Role Access to Update.
Karen Gibson	District Sales Manager	Set ASO: Manager Role Access to Update.
Jessie Chan	Senior Sales Representative	Set ASO: Price List Override to Yes. Set ASO: Discounting Privilege to Full.
Alma Santiago	Sales Representative	Set ASO: Price List Override to No. Set ASO: Discounting Privilege to None.
Renee Watson	Sales Representative	Set ASO: Price List Override to No. Set ASO: Discounting Privilege to None.
Jerry Washington	Senior Sales Representative	Set ASO: Price List Override to Yes. Set ASO: Discounting Privilege to Full.

Resource	Role	Profile Option
George Clark	Sales Representative	Set ASO: Price List Override to No . Set ASO: Discounting Privilege to None .
William Frederick	Senior Sales Representative	Set ASO: Price List Override to Yes . Set ASO: Discounting Privilege to Full .

C.2.1 Scenario 2 — New Quote Security

The East Region of the national sales organization has a group dedicated to working across districts selling new products to existing customers. This group should have the ability to create new quotes for all customers, whereas the Southeast and Northeast district teams should only have access to quotes for which they are on the sales team.

The profile option **ASO: New Quote Security** should be set at the user level.

Steps

1. For users on the Northeast and Southeast teams, set the profile to **Sales Team**.
2. For employees on the new product team, set the profile to **Yes**.

The following table lists the resources, their associated roles, and the profile option settings.

Resource	Role	Profile Option
Jessie Chan	Senior Sales Representative	Set ASO: New Quote Security to Sales Team .
Alma Santiago	Sales Representative	Set ASO: New Quote Security to Sales Team .
Renee Watson	Sales Representative	Set ASO: New Quote Security to Sales Team .
Jerry Washington	Senior Sales Representative	Set ASO: New Quote Security to Sales Team .
George Clark	Sales Representative	Set ASO: New Quote Security to None .

Resource	Role	Profile Option
William Frederick	Senior Sales Representative	Set ASO: New Quote Security to None .

C.3 Scenario 3 — Call Center Environment

The organization has a call center that handles new and existing quotes. Sales representatives are not dedicated to particular customers or quotes.

The profile **ASO: Security Enable from API** should be set to **No**. Therefore, no security check is performed. This speeds up performance.

Seeded Attributes in Oracle Approvals Management (OAM)

D.1 Commonly Used OAM Seeded Attributes

Table D-1, "OAM Seeded Attributes for Oracle Quoting" displays seeded, commonly used attributes, display level (header or line), attribute description, and attribute type.

Table D-1 OAM Seeded Attributes for Oracle Quoting

Attribute	Level	Description	Attribute Type
Quote Total	Header	Total quote amount. Includes shipping and freight charges and taxes.	Currency
Quote Line Total	Line	Total quote line amount prior to shipping and freight charges and taxes.	Currency
Unit List Price	Line	Unit list price.	Currency
Unit Net Price	Line	Unit net price.	Currency
Manual Adjustment Amount	Line	Sum of the header and line manual adjustment/amounts	Currency
Manual Adjustment Percent	Line	Sum of the header and line manual adjustment percentages.	Number

Table D-1 OAM Seeded Attributes for Oracle Quoting

Attribute	Level	Description	Attribute Type
Quantity	Line	Quantity	Number
Unit of Measure	Line	Unit of measure	String (List of Values, when available)
Pricing Agreement	Header	Pricing agreement	String (List of Values, when available)
Price List	Line	Price list	String (List of Values, when available)
Item Category (Defined in Inventory for the functional area "Order Entry")	Line	Item category	String (List of Values, when available)
Item Number	Line	Item number	String (List of Values, when available)
Customer Name	Header	Name of the sold-to customer	String (List of Values, when available)
Account Number	Header	Account number of the sold-to customer	String (List of Values, when available)

D.2 Mandatory Seeded OAM Attributes

OAM requires calling applications to populate specific mandatory attributes. All of these attributes are at the header level. [Table D-2, "OAM Mandatory Seeded Attributes"](#) lists seeded values and attribute types for these mandatory attributes.

Table D-2 OAM Mandatory Seeded Attributes

Attribute	Attribute Type	Value
ALLOW_DELETING_RULE_GENERATED_APPROVERS	Boolean	False
ALLOW_REQUESTOR_APPROVAL	Boolean	True
AT_LEAST_ONE_RULE_MUST_APPLY	Boolean	False
EFFECTIVE_RULE_DATE	Date	The date the quote is submitted for approval.
TRANSACTION_DATE	Date	The date the quote is submitted for approval.

Table D–2 OAM Mandatory Seeded Attributes

Attribute	Attribute Type	Value
TRANSACTION_GROUP_ID	Number	Null
TRANSACTION_ORG_ID	Number	Org id of the quote
TRANSACTION_SET_OF_BOOKS_ID	Number	Null
TRANSACTION_ID	Number	Quote header id
TRANSACTION_REQUESTOR_PERSON_ID	Number	Person_id/fnd_user id of the requestor

D.3 Non-Mandatory Seeded OAM Attributes

The following seeded OAM attributes are not mandatory, but may be required under certain circumstances. [Table D–3, "Non-mandatory Seeded OAM Attributes"](#) displays the seeded values for Oracle Quoting.

Table D–3 Non-mandatory Seeded OAM Attributes

Attribute	Attribute Type	Value
INCLUDE_ALL_JOB_LEVEL_APPROVERS	Boolean	False
JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID	Number	Null

Oracle Quoting Seeded Caches

E.1 Oracle Quoting Seeded Caches

The following table displays Oracle Quoting's seeded caches.

Table E-1 Seeded Caches for Oracle Quoting

Cache	Description
QOT_ATP_STATUS_CACHE	Stores information about ATP statuses, including status code and meaning.
QOT_BOM_ITEM_TYPE_CACHE	Stores information about BOM item types, including BOM item type code and meaning.
QOT_CREDIT_CARD_TYPE_CACHE	Stores information about credit card types, including credit card type and name.
QOT_CURRENCY_CACHE	Stores information about currencies, including currency code, meaning, symbol, and price list IDs.
QOT_IB_REL_TYPE_CACHE	Stores information about Install Base relationship types, including relationship type code and meaning.
QOT_ITEM_CTG_LIST_CACHE	Stores information about the list of item categories available for a particular category set.
QOT_ITEM_TYPE_CACHE	Stores information about item types, including item type code and meaning.
QOT_LINE_TYPE_LIST_CACHE	Stores information regarding the list of lines types available, based on operating unit, order type, and line category.
QOT_LOOKUP_VALUES_CACHE	Stores information about lookup types and the corresponding lookup values.

Table E-1 Seeded Caches for Oracle Quoting

Cache	Description
QOT_MKTG_SRC_TYPE_CACHE	Stores information about marketing source types, including source type code and name.,
QOT_MODIFIER_LEVEL_CACHE	Stores information about price modifier levels, including code and name.
QOT_MODIFIER_LINE_TYPE_CACHE	Store information about price modifier line types, including code and name,
QOT_OU_CACHE	Stores information about operating units, including operating unit ID and default territory code.
QOT_PAYMENT_METHOD_CACHE	Stores information about payment methods, including payment method code and meaning.
QOT_PAYMENT_TERM_CACHE	Stores information about payment terms, including payment term ID and name.
QOT_PQUOTE_OUTPUT_FMT_CACHE	Stores information about print quote formats, including code and name.
QOT_PQUOTE_TEMPLATE_CACHE	Stores information about print quote templates, including code and name.
QOT_PRICE_LIST_CACHE	Stores information about price lists, including price list ID, name, and currency code.
QOT_QUOTE_STATUS_CACHE	Stores information about quote statuses.
QOT_RELATIONSHIP_TYPE_CACHE	Stores information about relationship types, including relationship type code and meaning.
QOT_RESOURCE_CTG_CACHE	Stores information about resource categories, including resource category code and meaning.
QOT_RESOURCE_GROUP_CACHE	Stores information about resource groups, including resource group ID and name.
QOT_SALESUPP_COMP_CACHE	Stores information about sales supplement components, including component ID, name, instruction, description, component type, response type, and mandatory flag.
QOT_SALESUPP_RESP_CACHE	Stores information about sales supplement responses, including response ID and name.
QOT_SALESUPP_SECT_CACHE	Stores information about sales supplement sections, including section ID and name.

Table E-1 Seeded Caches for Oracle Quoting

Cache	Description
QOT_SALESUPP_TEMPL_CACHE	Stores information about sales supplement templates, including template ID and name.
QOT_SALES_CHANNEL_CACHE	Stores information about sales channels, including sales channel code and meaning.
QOT_SALES_CREDIT_TYPE_CACHE	Stores information about sales credit types, including sales credit type ID, name, and quota flag.
QOT_SHIPPING_METHOD_CACHE	Stores information about shipping methods, including shipping method code and name.
QOT_TAX_CACHE	Stores tax information, including tax code and printed tax meaning.
QOT_TAX_EXEMPT_REASON_CACHE	Stores information about tax exempt reasons, including tax exempt reason code and meaning.
QOT_TAX_EXEMPT_STATUS_CACHE	Stores information about tax exempt statuses, including tax exempt status code and meaning.
QOT_TERRITORY_CACHE	Stores information about territories, including territory code and name.
QOT_TRANSACTION_TYPE_CACHE	Stores information about transaction types, including transaction type ID, name, code, and price list ID.
QOT_TRXN_LINE_CTG_CODE	Stores information about transaction line categories, including line category code and meaning.
QOT_UOM_CACHE	Stores information about units of measure, including UOM code and name.
QOT_YES_NO_CACHE	Stores information about yes/no lookups, including code and meaning.

Glossary

API

An application programming interface (API) is a published interface comprising a set of tools, routines, and protocols for building software applications.

Application tier

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

Attributes

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

ATP (Availability to Promise)

The quantity of current on-hand, uncommitted stock, outstanding receipts and planned production. In Oracle Inventory, you define the types of supply and demand that should be included in your ATP calculation.

Bill-to customer

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

Configurable item

The base model item to which a user may add components.

Database tier

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

Debugger

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

Descriptive flexfield

A customizable field used to capture additional information not otherwise tracked by Oracle applications. A descriptive flexfield appears in your window as a single-character, unnamed field.

Desktop tier

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

GSA (General Services Administration)

A customer classification indicating that the customer is associated with the U.S. government. For products on the GSA price list, a fixed price must be used, defined on the GSA contract. The GSA price is the lowest price offered. The items contained on the GSA price list cannot be sold to non-GSA customers at or below the government price.

Internet Computing Architecture

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

Lookup types

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

LOV (List of Values)

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

Manual discounts

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

Middle tier

See [Application tier](#).

Modifier

Modifiers define how Oracle Pricing makes adjustments, including discounts or surcharges. In Oracle Pricing, when you set up modifiers, you define the adjustments your customers may receive. You control the application of modifiers by the pricing engine through rules that specify qualifiers, and through attributes governing their use.

Qualifier

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

QuickCodes

See [Lookup types](#).

Quote status

The quote status indicates the current stage of preparation for a specific quote. See [Section 4.1, "Setting Up Quote Status and Quote Status Transitions"](#) for a complete list of quote statuses.

Quote versioning

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

Role

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

Role types

A collection of roles associated with a particular CRM module.

Sourcing rule

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

Trade-in

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

Wildcard

A special character included in a search parameter that tells the application to search for all records similar to the search parameter. In Oracle Quoting, the percent sign, %, is the wildcard character. For example, when you enter "order%" as a quote name search parameter, the application returns all quotes with names that begin with "order."

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