

Oracle® Quoting

User Guide

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Oracle Quoting User Guide, Release 11*i*

Part No. B10589-02

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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via postal service:

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Quoting Documentation
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U.S.A.

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

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

Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle Quoting User 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 overviews of the application and its components, and explanations of key concepts, features, functions, and the application's relationships to other Oracle or third-party applications.
- Chapter 2 provides process-oriented, task-based procedures for using the application to perform essential business tasks.
- Chapter 3 lists the procedures needed to create quotes (HTML)

- Chapter 4 includes information on creating, modifying, and deleting templates (HTML)
- Chapter 5 provides procedures for performing searches (HTML)
- Chapter 6 provides information on performing credit checks (HTML)
- Chapter 7 includes information on pricing (HTML)
- Chapter 8 provides information on customers and relationships (HTML)
- Chapter 9 contains information on entering and modifying address and payment information (HTML)
- Chapter 10 contains information on modifying quotes (HTML)
- Chapter 11 includes procedural information for copying quotes (HTML)
- Chapter 12 provides information on creating proposals.
- Chapter 13 describes the concepts and procedures associated with approvals (HTML)
- Chapter 14 contains information on contracts integration (HTML)
- Chapter 15 provides information on creating notes, tasks, and attachments (HTML)
- Chapter 16 lists the steps necessary to enable and use security (HTML)
- Chapter 17 contains information on publishing and printing (HTML)
- Chapter 18 contains information on placing orders from quotes (HTML)
- Chapter 19 provides information on using folder functionality (Forms)
- Chapter 20 lists the procedures needed to create quotes (Forms)
- Chapter 21 provides procedures for performing searches (Forms)
- Chapter 22 provides information and procedures for performing credit checks (Forms)
- Chapter 23 includes information on pricing (Forms)
- Chapter 24 provides information on customers and relationships (Forms)
- Chapter 25 contains information on entering and modifying address and payment information (Forms)
- Chapter 26 contains information on modifying quotes (Forms)
- Chapter 27 includes procedural information for copying quotes (Forms)

- Chapter 28 describes the concepts and procedures associated with approvals (Forms)
- Chapter 29 contains information on contracts integration (Forms)
- Chapter 30 provides information on creating notes and attachments (Forms)
- Chapter 31 lists the steps necessary to enable and use security (Forms)
- Chapter 32 contains information on publishing and printing (Forms)
- Chapter 33 contains information on placing orders from quotes (Forms)
- Appendix A provides a reference to the Oracle Quoting HTML User Interface (UI).
- Appendix B provides a reference to the Oracle Quoting Forms User Interface (UI).

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, 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

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other

market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

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

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 Implementation Guide

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides useful information 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 needed to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the 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 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 Oracle8i server, and your hardware and software environment.

OracleMetaLink

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

Alerts: You should check *OracleMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows:

Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

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

Part I

Introduction and Overview

This part contains the following chapters:

- [Chapter 1, "Introduction to Oracle Quoting"](#)
- [Chapter 2, "Overview of Using Oracle Quoting"](#)

Introduction to Oracle Quoting

This chapter discusses the key features and process flows of Oracle Quoting. Sections in this chapter include:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Oracle Quoting Key Features"](#)
- [Section 1.3, "Oracle Quoting Integrations"](#)
- [Section 1.4, "What's New"](#)

1.1 Overview

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

Quoting users can create quotes using modifiable quote templates, add and configure complex products, manually adjust prices, and perform real-time global availability checks. Users can accept product trade-ins and assign sales credits. Quoting integration with Contracts allows users to negotiate a quote with a specific sales contract. Complex customer approval chains are supported and users can 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 Sales Online and Oracle Quoting-Forms with Oracle TeleSales.

1.2 Oracle Quoting Key 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

1.3 Oracle Quoting Integrations

Oracle Quoting integrates with the following modules:

- [Section 1.3.1, "Oracle Receivables"](#)
- [Section 1.3.2, "Oracle Advanced Pricing"](#)
- [Section 1.3.3, "Oracle Bill of Materials"](#)
- [Section 1.3.4, "Oracle General Ledger"](#)
- [Section 1.3.5, "Oracle Inventory"](#)
- [Section 1.3.6, "Oracle Order Management"](#)
- [Section 1.3.7, "Oracle Approvals Management"](#)
- [Section 1.3.8, "Oracle Advanced Planning"](#)
- [Section 1.3.9, "Oracle Configurator"](#)

1.3.1 Oracle Receivables

Provides tax information and customer account information. Refer to the *Oracle Receivables User Guide* for complete information.

1.3.2 Oracle Advanced Pricing

Allows set up of price lists, discounts, adjustments, and promotions. Refer to the *Oracle Pricing User's Guide* for complete information.

1.3.3 Oracle Bill of Materials

Contains information about the components associated with a product. Refer to the *Bill of Materials User's Guide* for complete information.

1.3.4 Oracle General Ledger

Enables set up of ledgers and books and store exchange rates. Refer to the *Oracle General Ledger User Guide* for complete information

1.3.5 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 information

1.3.6 Oracle Order Management

Allows creation of orders from quotes. Refer to the *Oracle Order Management User's Guide* for complete information

1.3.7 Oracle Approvals Management

Allows set up of approvals hierarchies, rules and notifications. Refer to *Implementing Oracle Approvals Management* for complete information.

1.3.8 Oracle Advanced Planning

Oracle Quoting uses Advanced Planning and Scheduling for Global ATP Check.

1.3.9 Oracle Configurator

Provides the ability to configure model items. Refer to the *Oracle Configurator Installation Guide* and *Oracle Configurator Implementation Guide* for complete information.

1.4 What's New

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

Overview of Using Oracle Quoting

This chapter provides an overview of the user interface, and the major tasks you can perform using Oracle Quoting. Sections in this chapter include:

- [Section 2.1, "Accessing Oracle Quoting HTML Interface"](#)
- [Section 2.2, "Accessing the Oracle Quoting Forms User Interface"](#)
- [Section 2.3, "Summary of Oracle Quoting Tasks"](#)

2.1 Accessing Oracle Quoting HTML Interface

The Quotes page is the gateway to viewing quote details and modifying existing quotes. From this page you can search for quotes, create a new quote, and copy an existing quote into a new quote.

At initial login the Quotes page displays the default Saved Search results as follows:

- Quote name
- Quote number
- Opportunity Name
- Customer name
- Customer account number
- Customer contact name
- Status
- Web published or not
- Expiration date
- Amount
- Order detail

You can designate a different Saved Search as your Quotes page default listing. For more information see [Section 5.4, "Saved Searches"](#).

Prerequisites

You must be logged in as a valid Quoting user. This will be assumed for all of the HTML procedures in this guide.

Steps

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

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

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

2. Enter your user name and password, then select **Go**.

The Quotes page opens, displaying the default saved search results.

2.2 Accessing the Oracle Quoting Forms User Interface

The Quoting form is your main workspace in the Forms UI. From this form you can create new quotes, query and modify existing quotes, view customer history, and print quotes, in addition to a number of other tasks.

To access the Quoting form in the Oracle Quoting forms UI:

Login

Log into Oracle Applications.

Responsibility

Quoting Sales Agent or Quoting Sales Manager

Prerequisites

You must be set up as an Application User with a valid password.

Steps

1. In the Navigator, choose **Quoting**.

The Quoting form displays.

2.3 Summary of Oracle Quoting Tasks

Use Oracle Quoting to perform the following types of tasks:

HTML

- [Chapter 3, "Creating Quotes"](#)
- [Chapter 4, "Creating and Modifying Templates"](#)
- [Chapter 5, "Searching"](#)
- [Chapter 6, "Credit Checks"](#)
- [Chapter 7, "Pricing Products and Quotes"](#)
- [Chapter 8, "Customers and Relationships"](#)
- [Chapter 9, "Entering Address and Payment Information"](#)

- Chapter 10, "Modifying Quotes"
- Chapter 11, "Copying Quotes"
- Chapter 12, "Creating Proposals from Quotes"
- Chapter 13, "Initiating Approvals"
- Chapter 14, "Applying Contracts to Quotes"
- Chapter 15, "Enabling Quoting Security"
- Chapter 16, "Notes, Tasks, and Attachments"
- Chapter 17, "Publishing and Printing"
- Chapter 18, "Placing Orders"

Forms

- Chapter 19, "Using Folder Functionality"
- Chapter 20, "Creating Quotes"
- Chapter 21, "Searching"
- Chapter 22, "Credit Checks"
- Chapter 23, "Pricing Products and Quotes"
- Chapter 24, "Customers and Relationships"
- Chapter 26, "Modifying Quotes"
- Chapter 25, "Entering Address and Payment Information"
- Chapter 27, "Copying Quotes"
- Chapter 28, "Initiating Approvals"
- Chapter 29, "Notes and Attachments"
- Chapter 30, "Applying Contracts to Quotes"
- Chapter 31, "Publishing and Printing"
- Chapter 32, "Enabling Quoting Security"
- Chapter 33, "Placing Orders"

Part II

User Procedures - HTML

This part contains the following chapters:

- Chapter 3, "Creating Quotes"
- Chapter 4, "Creating and Modifying Templates"
- Chapter 5, "Searching"
- Chapter 6, "Credit Checks"
- Chapter 7, "Pricing Products and Quotes"
- Chapter 8, "Customers and Relationships"
- Chapter 9, "Entering Address and Payment Information"
- Chapter 10, "Modifying Quotes"
- Chapter 11, "Copying Quotes"
- Chapter 12, "Creating Proposals from Quotes"
- Chapter 13, "Initiating Approvals"
- Chapter 14, "Applying Contracts to Quotes"
- Chapter 15, "Enabling Quoting Security"
- Chapter 16, "Notes, Tasks, and Attachments"
- Chapter 17, "Publishing and Printing"
- Chapter 18, "Placing Orders"

Creating Quotes

This section explains the procedures necessary to create a quote in Oracle Quoting.

- [Overview of Creating Quotes](#)
- [Creating a Quote](#)
- [Creating a Quote From an Opportunity](#)
- [Creating a Quote From a Template](#)
- [Creating a New Version of a Quote](#)

3.1 Overview of Creating Quotes

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

When you create a quote, you must specify the quote name, the customer, and the customer account (if the customer has an existing account). If the customer does not have an existing account, it is created based on the setting of the profile option **ASO: Auto Account Creation**. See [Section 8.1.2, "Creation of Accounts"](#) for more information. Defaulting logic exists for many of the other fields. A record for the new quote is created when you enter the quote name, a customer and select **Apply**.

With the exception of customer, customer account, currency and order type, other attributes can be changed or added after quote creation.

The searchable list of customers comes from Oracle Receivables. You can create new customers if the profile option **ASO: Create New Customer** is set to **Yes** at the appropriate level.

3.1.1 Understanding Quotes

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

Oracle Quoting maintains a list of all of the quote versions you have created. You can modify only the latest version of a quote. Previous versions of a quote are read-only: You can neither modify the quote from the user interface nor change the quote status but you can create new versions from old versions.

You cannot delete quotes once you have created them. Your administrator can set quotes to expire automatically after a certain period of time.

3.1.2 Quote Status

The status of a quote indicates the evolution of a quote from the initial offer to order placement. Quote status and transitions reflect your sales process. Status data indicates progression of the sales cycle.

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

- Decide which statuses allow modification of the quote and which are read-only
- Add statuses

- Change status names
- Define, by application, a default quote status on a new quote or version
- Decide the statuses to which a given status can change

3.1.2.1 Pre-Defined Quote Statuses

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

| Quote Status | Description | Read-only |
|-------------------|---|-----------|
| Approval Canceled | Sales representative canceled the approval process. | No |
| Approval Pending | Quote is pending approval. | Yes |
| Approval Rejected | Approval was rejected by the approvers. | No |
| Approved | Approved by the approvers. | Yes |
| Contract Canceled | Contract canceled by the contract administrator. | Yes |
| Contract Pending | Contract is review with the contract specialist. | Yes |
| Contract Required | Contract specialist to author and approve contract required after approval process. | Yes |
| Draft | Initial status. | No |
| Inactive | No more activity allowed. | Yes |
| Order Submitted | Order submitted to Oracle Order Management. | Yes |
| StoreDraft | For iStore internal use only. | No |

The statuses in the following table exist for backward compatibility (for previous version of Oracle Quoting), but there is no functionality behind 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 | <p>Could be used to show there is a problem with the quote being submitted as an order.</p> <p>Note: The system will not automatically set this status if the order is not submitted.</p> | No |
| Reviewed | <p>Could be used to show that the quote was reviewed internally.</p> | No |

If a quote status is *read only* you only update the following attributes:

- Modify tasks and notes.
- Change the quote status, as long as the transition is valid. Thus, you can potentially place an order, initiate approval, request contract creation or change, etc.
- Publish or unpublish a quote, if publishing is enabled and the quote satisfies publishing criteria.
- Modify payment information, until the order is submitted.
- Add attachments. You cannot remove, or replace existing attachments.

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 to be able to modify it.

If you want to update a quote in read-only status:

- Transition to an updateable status.
- Create a new quote version.
- Use **Duplicate Quote** to create a brand new quote.

3.1.2.2 Rules for Quote Status Changes

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

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

Table 3–1 Seeded Quote Status Transitions

| From | To | User Maintainable |
|------------------|--------------------|--------------------------|
| Approval Pending | Approved | No |
| Approval Pending | Approval Canceled | No |
| Approval Pending | Approval Rejected | No |
| Approval Pending | Contract Required | No |
| Contract Pending | Contract Approved | No |
| Contract Pending | Contract Cancelled | No |
| StoreDraft | Draft | No |
| StoreDraft | Inactive | No |
| StoreDraft | Order Submitted | No |
| StoreDraft | Contract Pending | No |

3.2 Creating a Quote

To create a quote in the HTML UI:

Prerequisites

The profile option **ASO: New Quote Security** must be set to **No** or **Sales Team** at the appropriate level to create new, standalone quotes. If set to **Yes**, you can still create quotes from opportunities. See [Chapter 15, "Enabling Quoting Security"](#), for more information.

Steps

1. In the Quotes page, select **Create Quote**.

Note: If the **ASO: Automatic Numbering** profile option is set to **No** at the appropriate level, you can enter a quote number which will be unique across all quotes. If this profile option is set to **Yes**, the system will automatically assign a number.

The Create Quote page opens.

2. Enter a name in the Quote Name field.

3. Enter the full Customer Name or enter a partial value and select **Go** to search for a customer.

When you select a customer from the search results:

- If you select a customer with an address, the address field is automatically populated. See [Section 9.2, "Address Defaulting"](#) for more information.
- The contact field is automatically populated, if a contact is displayed in the customer search. If there is no contact, the field is left blank.
- The account number field is automatically populated based on the selection in the search results. If the customer has no accounts, one will be created based on the setting of **ASO: Auto Account Creation**. See [Section 8.1.2, "Creation of Accounts"](#) for more information.

Note: You can also search by entering the exact account number in the Account Number field and selecting **Go**. The Customer Name and address will be populated from the values associated with the account number selected from the search results.

4. Optionally, enter a Contact Name or enter a partial value and select **Go** to search for the contact.
5. Optionally, change the defaulted quote-to address, if any, or select **Go** to search for customer addresses.
6. Optionally, change the default expiration date.

The expiration date is defaulted based on the profile options **ASO: Default Expiration Date GL Calendar** and **ASO: Default Expiration GL Period Type**, or the profile option **ASO: Quote Duration**. See the *Oracle Quoting Implementation Guide* for more information.

7. Optionally, select a different Primary Salesperson.

Note: The Primary Salesperson defaults to the user creating the quote, if that user is set up as a salesperson for the current operating unit. If not, it defaults to the sales representative designated in the profile option **ASO: Default Salesrep**.

8. Optionally, select a different primary salesgroup from the drop-down menu.

The primary salesgroup defaults from the profile option **ASO: Default Salesgroup**. See the *Oracle Quoting Implementation Guide* for more information.

9. Optionally, select a different sales channel using the drop-down menu.
10. Optionally, select a source for the quote.

Source Name refers to various marketing sources, such as campaign, that are set up in Oracle Marketing Online. If the quote is created from an opportunity, the source name defaults from Oracle Sales Online (OSO). If you are creating a quote directly, you can specify a source name in this field.

11. Optionally, use the drop-down menu to select a different Order Type.
12. Optionally, use the drop-down menu to select an Agreement. The Agreement menu lists agreements that are valid for the customer and agreements that apply to all customers.
13. Optionally, use the drop-down menu to select a different Currency.
14. Optionally, use the drop-down menu to select a different price list.
15. Optionally, use the drop-down menu to select a different Contract Template.
16. Select **Apply**. The quote is created and the Lines page opens.

From this page you can:

- Add products to the quote
- Add services to the quote

Note: A record for the new quote is created when you enter the quote name. Oracle Quoting then generates the quote and version numbers, creation date, and status.

The quote number is unique across all quotes for all customer IDs and account numbers. For a new quote the version number is 1 and the status is *draft*.

3.3 Creating a Quote From an Opportunity

To create a quote from an opportunity:

Prerequisites

The user must be logged into Oracle Sales Online to perform this procedure.

Use an existing opportunity or create a new one. See the *Oracle Sales Online User Guide* for detailed instructions on creating and accessing opportunities.

Steps

1. Navigate to **Opportunity > Opportunities**.
2. Select the opportunity you want to use. The Opportunity Details page opens.
3. Select **Create Quote**. The Create Quote From Opportunity page opens.
4. The Quote Name field defaults from the Opportunity Name. This field can be edited.
5. The following fields, when available, are defaulted to the quote, and **cannot** be changed:
 - Customer Name
 - Account Number

Note: If the customer has only one account number, the account number and description default into the account field. If there are multiple account numbers, they are displayed, with descriptions, in a drop-down menu for selection. If there are no account numbers, one will be created in Quoting based on the setting of the profile option ASO: Auto Account Creation. See [Section 8.1.2, "Creation of Accounts"](#) or the *Oracle Quoting Implementation Guide* for more information.

- Opportunity Name
6. To select or change the Contact Name, enter a partial value and %, then press **Go**, for a limited list. Press **Go** for a full list of all possible contacts.
 7. To change the default Address:
 - Edit the field directly

- Enter a partial value and %, then press **Go** for a limited list
 - Press **Go** for a full list of all available customer addresses
8. Enter a new expiration date or use the calendar icon to choose a date.
 9. To select or change the Primary Salesperson, enter a partial value and %, then press **Go**, for a limited list, or press **Go** for a full list of contacts.
 10. Optionally, using the relevant drop-down menu, select the:
 - Primary Sales Group
 - Sales Channel
 - Source Name
 - Order Type
 - Agreement
 - Price List
 - Contract Template
 - Currency
 11. Select **Apply** to create the quote.
The Lines page opens.

3.4 Creating a Quote From a Template

To create a quote from a template:

Prerequisites

None

Steps

1. Navigate to the Templates page
2. Select the template(s) to use by checking the appropriate box(es).

Note: If the profile option **ASO: Manage Quote Template** is set to **No** at the appropriate level, you will be able to create a quote by selecting the template hyperlink and then selecting **Create Quote**. You will not be able to update templates.

3. Select **Create Quote**. The Create Quote page opens. Refer to Section 3.2, [Creating a Quote](#) for detailed information.

3.5 Creating a New Version of a Quote

View all versions of a quote from the Overview page, left menu bar by selecting **Versions** under Other Information.

To create a new version of a quote:

Prerequisites

- The user must have update access to the quote.
- The highest version of the quote is not in one of the following statuses:
 - Approval Pending
 - Ordered
 - Contract Cancelled
- A contract is not attached to the quote.

Steps

1. Display the quote in the Quote Overview page.

Note: To view all versions of the quote navigate to Other Information in the left hand menu bar and select **Versions**.

2. From the Actions menu, select **Create New Version**.

The page displays confirmation that a new version was created. The version number increases by one.

Creating and Modifying Templates

This section outlines the creation and use of templates in Oracle Quoting. This functionality is only available in the HTML UI.

- [Overview of Templates](#)
- [Creating a Template](#)
- [Creating a Quote From a Template](#)
- [Modifying a Template](#)
- [Deleting a Template](#)

4.1 Overview of Templates

In Oracle Quoting you can create quote templates that predefine products and quantities thus automating recurrent quote content. For configured products, add a product to your template, launch Configurator and save the resulting configuration in the template. You can add service products to templates.

4.2 Creating a Template

To create a quote template:

Prerequisites

- The profile option **ASO: Manage Quote Template** must be set to **Yes**. If set to **No**, you will not be able to update templates.

Steps

1. Select the Templates link in the main Quotes page. The Templates page opens.
2. Select **Create Template**. The Create Template page opens.
3. Enter a name in the Template Name field.
4. Optionally, enter a description for the template.
5. Select **Apply**. A Template Detail page displays with confirmation that the template was created.
6. To add a line to the template, select **Add Product**. The Search and Select: Product page opens.
7. Select a product category and type in keyword criteria for your product search.
8. Select **Go**. The search results display at the bottom of the page.
9. Select the product(s) to add to your template by placing a check in the Select box.
10. Choose **Select** to add the products to the quote

OR

Choose **Select and Add More** to add selected products to the quote and return to the Search and Select: Product page to search for more products. The Template Details page displays the template with the products you added.

From this page, you can:

- Change the quantity of a product by overwriting the value in the Quantity field and selecting **Apply**. If changing the quantity of a model product, the quantity of all the components will be updated to match the model product's quantity. If changing the quantity of a component, the top level model product and all other components will be updated to match the quantity.

Note: The quantities of the model and components will be synchronized but will not necessarily be equal.

- Add a service by choosing **Add Services** from the drop-down menu and selecting **Go**. See [Section 10.3, "Adding Services to Quotes"](#) for more information.
- Configure a model product by choosing **Configure** from the drop-down menu and selecting **Go**. See [Section 10.4, "Configuring Products"](#) for more information.
- Duplicate an existing configuration or a line by selecting **Duplicate Line** from the drop-down menu and selecting **Go**. See [Section 10.4.2, "Duplicating an Existing Configuration in a Quote"](#) and [Section 10.5, "Duplicating a Line"](#) for more information.
- Delete a line or a component line by choosing **Remove Line** from the drop-down menu and selecting **Go**. See [Section 10.2, "Removing Products From the Quote"](#) and [Section 10.4.1, "Deleting a Component"](#) for more information.
- Modify an existing service by selecting **Modify Service** from the drop-down menu and selecting **Go**. See [Section 10.3.3, "Modifying a Service"](#) for more information.

11. Select **Apply** to save the template.

4.3 Creating a Quote From a Template

To create a quote from a template:

Prerequisites

None

Steps

1. Navigate to the Templates page
2. Select the template(s) to use by checking the appropriate box(es).

Note: If the profile option **ASO: Manage Quote Template** is set to **No** at the appropriate level, you will be able to create a quote by selecting the template hyperlink and then selecting **Create Quote**. You will **not** be able to update templates.

3. Select **Create Quote**. The Create Quote page opens. Refer to [Section 3.2, "Creating a Quote"](#) for detailed information.

The products from the template are added to the quote and displayed in the Lines page.

4.4 Modifying a Template

To modify a template:

Prerequisites

The profile option **ASO: Manage Quote Template** must be set to **Yes**. If set to **No**, you will not be able to update templates

Steps

1. Navigate to the Templates page.
2. Select to search by template name or description.
3. Enter the template name or description in the text field, using the wildcard as necessary.
4. Select **Go**. The template matching the search criteria displays in the Results section.

5. Select the Name hyperlink for the template you want to modify. The Template Detail page opens.
6. Add a product by selecting **Add Product**.
7. Change quantities by entering a number in the Quantity field.

If changing the quantity of a model product, the quantity of all the components will be updated to match the model product's quantity. If changing the quantity of a component, the top level model product and all other components will be updated to match the quantity.

Note: The quantities of the model and components will be synchronized but will not necessarily be equal.

8. Select the product line to modify.
 - a. Add a service by selecting **Add Service > Go**. See [Section 10.3, "Adding Services to Quotes"](#) for more information.
 - b. Configure a product by selecting **Configure > Go**. See [Section 10.4, "Configuring Products"](#) for more information.
 - c. Duplicate a line by selecting **Duplicate Line > Go**. See [Section 10.4.2, "Duplicating an Existing Configuration in a Quote"](#) and [Section 10.5, "Duplicating a Line"](#) for more information.
 - d. Remove a product by selecting **Remove Line > Go**. See [Section 10.2, "Removing Products From the Quote"](#) and [Section 10.4.1, "Deleting a Component"](#) for more information.
 - e. Modify an existing service by selecting **Modify Service > Go**. See [Section 10.3.3, "Modifying a Service"](#) for more information.
9. Select **Apply** to save your changes and return to the Templates page.

4.5 Deleting a Template

To delete a template:

Prerequisites

The profile option **ASO: Manage Quote Template** must be set to **Yes**. If set to **No**, you will not be able to delete templates

Steps

1. Navigate to the Templates page.
2. Select whether you want to search by template name or description.
3. Enter the template name or description in the text field, using the wildcard character as necessary.
4. Select **Go**.

The template matching the search criteria displays in the Results section.

5. Place a check in the Select box next to the template you want to delete.
6. Select **Delete**.

The Template page refreshes and displays confirmation that the template was deleted.

This section contains information on performing searches in Oracle Quoting.

- [Overview of Searching for Quotes](#)
- [Basic Search for Quotes](#)
- [Advanced Search for Quotes](#)
- [Saved Searches](#)
- [Using interMedia Search](#)

5.1 Overview of Searching for Quotes

In the Quotes page, you can search for quotes assigned to you. A basic search allows you to search using the following criteria:

- Quote number
- Quote name
- Customer name
- Account number
- Contact name

An Advanced search allows you to search using:

- Quote name
- Quote number
- Customer name (Party Name)
- Customer type
- Account number (financial account)
- Contact name
- Opportunity name
- Status
- Web published
- Quote amount range
- Currency
- Update date range
- Expiration date range
- Creation date range
- Sales person
- Sales group
- Option to restrict to primary salesperson and primary sales group
- Sales channel
- Source name

You can combine search criteria, or leave all fields blank to display all quotes that you can access.

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

5.2 Basic Search for Quotes

To perform a basic search for a quote:

Prerequisites

None

Steps

1. In the Quote Search section, enter criteria for the search or if you wish to display all quotes accessible to you, leave the criteria fields blank.
2. Select **Go**. The Results section of the Quotes page displays the quotes assigned to you that match the search criteria. The results are sorted by Update Date (descending order). Only the latest versions of quotes appear.

5.3 Advanced Search for Quotes

To perform an advanced search for a quote:

Prerequisites

None

Steps

1. In the Search box, select the Advanced Search link. The Advanced Search page displays.
2. Enter the criteria for your search. To display all quotes that you have access to, leave all fields blank.
3. Select **Go**. The results display in the Results section on the Advanced Search page. The most recently updated quote appears at the top of the list.
4. To save your search, select **Save Search Criteria**. The Create Saved Search page displays.

5. Enter saved search name and select **Apply**.
6. To create a quote, select **Create Quote**.

5.4 Saved Searches

Saved Searches allow you to save query criteria, select and organize the displayed columns, define sort criteria, and define one saved search as the default view of the Quote page. *My Open Quotes* is the seeded default view for the Quotes page.

There are four seeded saved searches:

- *My Open Quotes* — Quotes with a status of *Draft*, *Approval Canceled*, or *Approval Rejected*.
- *My Approved Quotes* — Quotes with a status of *Approved* or *Contract Required*.
- *My Pending Quotes* — Quotes with a status of *Approval Pending* or *Contract Pending*.
- *My Ordered Quotes* — Quotes with a status of *Order Submitted*.

Note: Seeded searches only search against quotes belonging to the sales team of the logged-on user. Seeded searches cannot be modified or deleted.

Seeded saved search results are sorted by Update Date in descending order.

5.4.1 Creating a Saved Search

To create a saved search:

Prerequisites

None

Steps

1. Select **Personalize** in the Saved Searches bin. The Saved Searches page opens displaying a list of your saved searches.
2. Select **Create Saved Search**. The Create Saved Search page opens.
3. In the Query Properties section, enter search criteria for the saved search.

4. In the Column Properties section, select the order and content of the columns that will display in your saved search.
5. In the General Properties section, enter a name in the Saved Search Name field.
6. To designate the saved search as the default view for the Quotes page, select the Use as Default Saved Search box.
7. Optionally, select the number of displayed rows and enter a description for the search.
8. Select **Apply** to save the search.
9. Select **Apply and View** to save the search and view it in the main Quotes page.

5.4.2 Viewing a Saved Search

To view a saved search:

Prerequisites

None

Steps

1. In the Saved Searches bin, select the saved search from the drop-down menu.
2. Select **Go**. The Saved Search displays in the Results section of the Quotes page.

5.4.3 Modifying a Saved Search

To modify a saved search:

Prerequisites

None

Steps

1. Select **Personalize** from the Saved Searches bin. The Saved Searches page opens.
2. Select the linked Name of the saved search. The Update Saved Search page opens.
3. Make the necessary changes to your search criteria.
4. Select **Apply** to save the search.

5. Select **Apply and View** to save the search and view it in the main quotes page.

5.4.4 Deleting a Saved Search

To delete a saved search:

Prerequisites

None

Steps

1. In the Saved Searches bin, select **Personalize**. The Saved Searches page opens.
2. Select the radio button for the saved search you want to delete.
3. Select **Delete**.

Note: You cannot delete or modify seeded saved searches or searches marked with an asterisk.

5.4.5 Copying a Saved Search

To copy a search:

Prerequisites

None

Steps

1. In the Saved Searches bin, select **Personalize**. The Saved Searches page opens.
2. Select the search you want to copy.
3. Select **Duplicate**. The Create Saved Search page opens with the initial saved search's criteria defaulted in the fields.
4. Modify the search criteria as necessary.
5. Enter a name in the Saved Search Name field.
6. Select **Apply** to save the search.
7. Select **Apply and View** to save the search and view it in the main quotes page.

5.5 Using interMedia Search

If **ASO: Enable interMedia Search** is set to **Yes**, you can search the product catalog for products using the interMedia search. interMedia search allows you to search for products using any of the following criteria:

- Part Number
- Description
- Long Description

interMedia search performs keyword searches and does not require wildcards.

If interMedia search is not enabled, you can search by Product Number and Description in the Product field. You must enter a value followed by the wildcard or an exact match.

6

Credit Checks

This section contains information about performing credit checks.

- [Overview of Credit Checking](#)
- [Performing a Credit Check](#)

6.1 Overview of Credit Checking

Credit checking in Oracle Quoting allows the user to determine the credit worthiness of a customer while working on a quote. The user can decide if the quote should be submitted for business approvals credit verification. The profile option **ASO: Enable Credit Check** determines if credit checks can be performed. See the *Oracle Quoting Implementation Guide* for more information.

There are two types of credit checks available in Oracle Quoting:

Internal — Internal credit checking is based on transaction data in the quote, and historic transaction data in Oracle Order Management and Oracle Receivables. It pertains to quote header level billing information. Internal credit checks are performed by the public credit check API OE_EXTERNAL_CREDIT_PUB.

The key differences between internal credit checking and the credit checking functionality in Oracle Order Management are:

- Item category limits are not checked in the public credit check API provided for internal credit checks.
- Credit checking is only available at the header level in internal credit checking, while OM credit checking supports both header and line level credit checks.
- There is no Holds functionality for Internal credit check

External — External credit checks are configurable by the application developer and allow users to make calls to non-Oracle applications. Please see the *Oracle Quoting Implementation Guide* for more information.

Based on setup, internal and/or external credit checks may be performed. The internal credit check is performed if **ASO: Credit Check Rule** is set at the appropriate level. The external credit check is performed if it is configured by the application developer.

6.2 Performing a Credit Check

To perform a credit check:

Prerequisites

- **ASO: Enable Credit Check** must be set to **Yes** at the appropriate level.
- The quote status must not be **Order Submitted**

- The quote must not be expired.
- The highest version of the quote must be used.
- The quote must not be submitted for batch pricing.
- There must be a designated Billing customer with an account and a billing address on the quote.
- Pricing and Tax Statuses must both be complete.

Steps

1. Navigate to the Overview page.
2. Select **Actions > Initiate Credit Check** and select **Go**.
3. A window displays the results of the credit check.

Note: The results of the credit check are not saved in the quote.

Pricing Products and Quotes

This section provides information and instructions on pricing products or entire quotes.

- [Overview of Pricing](#)
- [Freezing Prices for a Quote](#)
- [Executing Manual Pricing Requests for a Quote](#)

7.1 Overview of Pricing

The price your customer pays for an product depends on the price lists, manual adjustments, and promotional discounts as well as on automatic modifiers set up in Oracle Advanced Pricing.

7.1.1 Price Lists

Price lists are set up in Oracle Advanced Pricing. Your company may have several different price lists mapping to different customer types. Separate price lists often exist for consumers and corporate customers, reflecting volume discounts for organizations that purchase in large quantities. Additional price lists may reflect special contractual arrangements with other customers.

You can select a price list for the quote as a whole as well as for each individual product. The product price list supersedes the whole quote price list when determining the price for that specific product.

The header price list defaults based on the following information on the quote (in the following order):

- Agreement
- Quote-to Customer
- Order Type

If you leave the header price list field blank, the price list is determined by Oracle Advanced Pricing based on Price List setup. See the *Oracle Pricing User's Guide* for more information.

7.1.2 Discounts

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

Example

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

- The coat: $\$200 - 50\% = \100

- The shirt: $\$100 - 60\% = \40
- Total price = $\$140$

7.1.3 Pricing Adjustments

Oracle Quoting displays automatic adjustments (calculated in Oracle Advanced Pricing) applicable to the selected product and customer.

If **ASO: Calculate Price** is set to **Automatic**, each time you change a product in a quote, the whole quote is repriced automatically. A change in one product can affect the level of other offers and discounts.

Pricing Date

Oracle Pricing uses the Pricing Date to interpret the effective dates set up in pricing. Pricing Date is useful if you want to ensure that the prices on a quote do not change if product prices are updated in Oracle Pricing. You may also want to initially quote prices based on historical pricing information or future pricing information.

7.1.4 Manual Adjustments

You can manually override prices at the header level or line level.

Manual adjustments at the header level are entered in the Header Manual Discount field in the Grand Total section of the Lines page. All header manual discounts are applied as percentages.

Depending on which columns are exposed in the Lines page, you could potentially perform the following manual discounts at the line level:

- Enter a value in the Line Discount field
- Enter a value in the Unit Adjustment Percent
- Override the Unit Selling Price

Note: If these fields are enabled and you enter conflicting values in the fields, the line is priced based on:

Unit Selling Price

Unit Adjustment Percent

Line Discount

Manual adjustments are available only if the profile **ASO: Discounting Privilege** is set to **Full**.

7.1.5 Terms Substitution

When a quote is priced using Advanced Pricing, the pricing engine checks if there are terms substitutions available at either the header or line level. The following terms substitution types are supported by Oracle Advanced Pricing:

- Payment Terms Substitution
- Freight Terms Substitution
- Shipping Method Substitution

Depending on the defined modifiers, any of the available values can be substituted after the pricing engine call.

For more information on modifiers and terms substitution, see the *Oracle Advanced Pricing User's Guide* and the *Oracle Advanced Pricing Implementation Manual*.

7.2 Applying Header Promotion Codes

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

To apply header level promotion codes:

Prerequisites

None

Steps

1. Navigate to the Pricing page for the quote.
2. In the Promotion Code section select **Add Promotion Codes**. The Search and Select: Promotion Codes page displays.
3. Select to search by Promotion code or name.
4. Enter a promotion code/name, a partial code/name and %, or % alone and select **Go**. % and **Go** will display a list of all available promotions. The results section displays the promotion code search results.

5. Select the promotion code(s) to apply to the quote by placing a check in the Select box.
6. Choose **Select**. The Pricing page displays with the selected promotion codes in the Promotion Code section.

Note: You cannot add duplicate promotion codes.

7. Optionally, remove a promotion code by selecting the checkbox next to it and selecting **Delete**.
8. Select **Apply** when you have finished entering promotion codes. The promotion codes are applied to the quote.

7.3 Applying Line Level Promotion Codes

To apply line level promotion codes:

Prerequisites

None

Steps

1. Navigate to the Lines page for the quote.
2. Select the line for the promotion code.
3. Select **Actions > Adjust Pricing** and select **Go**. The Adjust Pricing page displays Pricing detail.
4. Select **Add Promotion Codes**. The Search and Select: Promotion Codes page displays.
5. Follow steps 3-6 in [Section 7.2, "Applying Header Promotion Codes"](#), above.
6. Optionally, remove a promotion code by selecting the checkbox next to it and selecting **Delete**.
7. Choose **Select**. The Adjust Pricing page displays with the selected promotion codes in the Promotion Code section.
8. Select **Apply** when you have finished entering promotion codes. The promotion codes are applied to the quote line.

7.4 Applying a Header Discount

To apply a header level discount:

Prerequisites

- **ASO: Discounting Privilege** must be set to **Full** at the appropriate level.
- Set up at least one header level, overrideable modifier in Oracle Pricing.

Steps

1. Navigate to the Grand Total region of the Lines page.
2. Enter the discount amount (percent) to apply in the Header Manual Discount field.

Note: The sign of the percentage is interpreted based on the setting of **ASO: Require Minus Sign for Manual Discount**. See the Oracle Quoting Implementation Guide for more information.

3. Select **Apply**. The page refreshes, displaying confirmation that the change occurred. The Price Adjustments column also displays the header discount amount.

7.5 Applying a Line Level Discount

To apply a line level discount:

Prerequisites

- **ASO: Discounting Privilege** must be set to **Full** at the appropriate level.
- Set up at least one line level, overrideable modifier in Oracle Pricing.

Steps

1. Navigate to the Lines page.
2. Select the line to discount.
3. Apply a discount in one of the following ways:
 - Enter a value in the Unit Adjustment Percent.

The Unit Adjustment Percent column on the Lines page displays the total of all adjustments currently applied to the line. This value is shown as a percent of the unit list price. If this value is changed, the difference is applied to a manual pricing modifier.

A positive number is applied as a surcharge and a negative number is applied as a discount.

- Override the value in the Unit Selling Price field
- In the Line Discount field, enter the discount amount and select whether it will be applied as a percentage or as an amount.

The profile **ASO: Require Minus Sign for Manual Discount** determines if the value entered in this field is applied as a discount or a surcharge based on whether it is negative or positive. See the *Oracle Quoting Implementation Guide* for more information.

Note: If these fields are enabled and you enter conflicting values in the fields, the line is priced based on:

Unit Selling Price

Unit Adjustment Percent

Line Discount

4. Select **Apply**. The page refreshes, displaying confirmation that the change occurred. The Price Adjustments column also displays the line discount amount.

7.6 Applying Pricing Agreements

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

When creating a quote, you can select an applicable pricing agreement. For an existing quote you can select a pricing agreement in the General page.

The Agreement LOVs display all customer specific and universal pricing agreements.

Prerequisites

Pricing agreements must be set up for the customer in Oracle Order Management or Oracle Pricing.

Steps

1. In either the Create Quote page or General page, use the LOV to select an Agreement.
2. Select **Apply**. The quote is priced based on the selected agreement.

7.7 Freezing Prices for a Quote

Oracle Pricing uses the Pricing Date to interpret the effective dates for prices. If the Pricing Date is set to January 1, 2002, only prices, discounts and adjustments that are **valid** as of January 1, 2002 are calculated.

Note: Pricing Date is not limited to the current date, but can be any date in the past or future.

Pricing Date ensure that the prices on a quote do not change if product prices are updated in Pricing. You can quote prices based on historical or future pricing information.

By selecting the Freeze Price option in the Actions menu, you can save the current date and reuse it for future pricing calls. This date subsequently appears on the quote as the Pricing Date. You can also change the Pricing Date to any date, including past or future dates.

If no date is selected, Oracle Quoting uses the current date for prices, discounts, and adjustments.

Prerequisites

- The highest version of the quote must be used.
- The quote is not in a read-only status.

Steps

1. Navigate to the Overview page.
2. Choose **Freeze Prices** from the Actions menu and select **Go**. The page displays confirmation that the quote was updated.

In the Pricing page, the Pricing Date field shows today's date. This date is used for all subsequent pricing checks.

3. Optionally, you can unfreeze prices, by choosing **Unfreeze Prices** from the Actions menu and selecting **Go**.

7.8 Executing Manual Pricing Requests for a Quote

Out of the box, Oracle Quoting automatically prices a quote whenever a change is made to the quote that affects pricing, A quote change that affects the pricing will also affect tax values. Therefore, the pricing call also calculates taxes. Tax is computed after the pricing call, since it is dependant on product pricing. Any quote change **NOT** listed below affects the pricing for a quote:

- Sales credits changes
- Attachments changes
- Notes changes
- Tasks changes
- Initiate/Cancel Approvals
- Request Contract Creation or Assistance
- Sales Team changes
- Web Publish or Unpublish
- Initiate Credit Check
- Sales Supplement changes
- System driven quote status changes
- Place Order

You can now choose when each quote is priced, 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. See the *Oracle Quoting Implementation Guide* for more information.

Note: Setting **ASO: Calculate Price** to **Manual** and **ASO: Calculate Tax** to **Automatic** is not supported because quote tax is based on the quote product pricing.

A user can still manually price a quote by selecting **Price Quote**, even if the profiles **ASO: Calculate Price** and **ASO: Calculate Tax** are set to **Automatic**. It is possible that pricing on a quote may not be current, due to pricing setup changes or the setting of pricing date. The user can manually price the quote to get the price/tax based on the latest setup.

If the Pricing Date is set, Oracle Quoting will price the quote as of the date specified in the Pricing Date field. The date can be any time in the past or future. If this field is blank, quotes are priced as of the current date and time.

The option to manually price a quote is particularly helpful to users who are:

- Entering a large number of quotes lines
- Entering a large number of quote lines in a Configurator session
- Making a large number of quote line changes
- Entering a large number of quote lines in a quote template or across multiple templates.
- Have complex tax or pricing setups.

These actions can all take a considerable amount of time if the quote is repriced after each change or addition. Therefore, the ability to price the quote manually will save time.

If the pricing or tax statuses are incomplete, users will not be allowed to:

- Submit a quote for approval
- Approve a quote
- Request Contract Creation
- Web publish a quote

- Initiate a credit check
- Print a quote
- Create a proposal
- Place an order

To manually price a quote:

Prerequisites

- The highest version of the quote must be used.
- The quote is not in a read-only status.
- The user has Update access to the quote
- The quote has not been submitted to batch pricing

Steps

1. Navigate to the Overview page and select **Price Quote** from the Actions menu.

If **ASO: Calculate Price** is **Automatic** AND **ASO: Calculate Tax** is **Automatic** AND **ASO: Enable Batch Processing** is **No**, the Price Quote page will not be shown but the quote will be priced. For any other combination of these three profiles, the Price Quote page will be displayed.

2. Choose to compute price only, tax only, or both.
3. Choose when you want to price the quote.

If you have **ASO: Enable Batch Processing** set to **Yes**, you will have two options for pricing the quote: **Now** or **Submit pricing request and notify me when it is complete**. If **ASO: Enable Batch Processing** is set to **No**, these options disappear and the application defaults to **Now**. See the *Oracle Quoting Implementation Guide* for more information.

4. Select **Submit**.

The quote is locked until the pricing request is complete or canceled. The Overview page displays the Pricing and Tax Statuses, and the Pricing Request number, if you selected **Submit pricing request and notify me when it is complete** in the Submissions Options field on the Price Quote page. The Pricing Request field does not appear if the profile **ASO: Enable Batch Processing** is set to **No**. Additionally, the pricing and tax status indicators are part of the quote context and appear wherever the quote context is shown.

The Pricing Updated On date and Tax Updated On date appear on the Pricing page.

7.8.1 Viewing Details of the Pricing Request

You can view the pricing request details if **ASO: Enable Batch Processing** is set to **Yes** and a pricing request has been submitted for batch execution.

To view pricing request details:

Prerequisites

- **ASO: Enable Batch Processing** must be set to **Yes**.
- The user must have Update access
- The quote must not be in a status that is read-only
- The quote has been submitted for batch pricing

Note: After the batch pricing request completes the user will receive an email notification.

Steps

1. Select the Pricing Request link on the Overview page.
2. The Pricing Request Details page displays:
 - Pricing and Tax Statuses
 - Pricing Request ID
 - Date Submitted
 - Request Name
 - Phase
 - Requestor
 - Date Started
 - Status

7.8.2 Canceling a Pricing Request

To cancel a pricing request:

Prerequisites

- **ASO: Enable Batch Processing** must be set to **Yes**.
- The quote has been submitted for batch pricing

Note: when a quote is submitted for batch pricing, the phase may be one of the following: Pending, Inactive or Running.

- These highest version of the quote must be used.
- The quote is not in a read-only status.
- User must have Update access

Steps

1. Select **Cancel Pricing Request** from the Actions menu on the Overview page.

The Pricing Request status changes to Canceled. A message displays indicating that the pricing request was canceled.

The user also receives an email notification confirming the cancellation.

Customers and Relationships

This chapter contains information about customer types, customer data, and customer relationships.

- [Overview of Customers and Relationships](#)
- [Creating Customers](#)

8.1 Overview of Customers and Relationships

There are two customer types in Quoting:

- Person
- Organization

Parties of type **person** are individuals purchasing on their own behalf. A person can have multiple addresses and telephone numbers.

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

A **contact** is a representative of an organization. Any individual at an organization can be a contact. Contacts within an organization are set up with roles such as *contact for Organization A* or *employee of Organization B*.

8.1.1 Customer Data

To create quotes and orders, certain standard customer information is necessary.

Note: The customer, referred to in Quoting as the Quote-to customer, is the party for whom the quote is being created. This party becomes the sold-to customer when the quote is converted into an order in Oracle Order Management.

The following table shows the mapping of the HTML UI terminology to the Oracle Receivables (AR) TCA terminology.

| Location in UI | Quoting Terminology | AR Terminology (TCA) |
|---------------------------|---|--|
| General Page | Quote-to Customer, Quote-to Contact, Quote-to Address Note: The quote-to address is not passed into OM. | Sold-to Customer, Sold-to Contact |
| Shipping and Billing Page | Customer Name, Contact, Address | Ship-to Customer, Ship-to Contact, Ship-to Address |

| Location in UI | Quoting Terminology | AR Terminology (TCA) |
|---------------------------|---------------------------------|--|
| Shipping and Billing Page | Customer Name, Contact, Address | Bill-to Customer, Bill-to Contact, Bill-to Address |

Customer information can be grouped into the following areas:

Quote-To Information

- **Quote-To Customer** — The name and financial account of the customer. Sometimes only the name of the customer is known, as there may not be a financial account set up for the customer. The quote-to customer is financially responsible for the order; for example, credit and collections contacts the quote-to customer if payment is not received.
- **Quote-To Contact** — A person representing the quote-to customer, only when the quote-to customer is of party type organization. You cannot enter a contact if the Quote-To Customer is of type Person. This field is optional.
- **Quote-To Address** — Address for the quote-to customer or quote-to contact. This address is used for mailing purposes. The Quote-to address is an optional address. It may be passed to the quote from an opportunity, but it is not passed into Oracle Order Management when converting a quote to an order

Bill-To Information

- **Bill-to Customer** — The name and financial account of the customer to be invoiced for the goods or service ordered.
- **Bill-to Contact** — A person representing the billing customer who deals with all invoice-related issues for the order, only when the billing customer is of party type organization. This field is optional.
- **Bill-to Address** — A physical location where the invoice is sent. This address can be associated with either the bill-to customer or the bill-to contact. If you choose an address that is not of the type bill-to, then it is created as a bill-to address when the quote is saved.

Ship-To Information

- **Ship-to Customer** — The name and financial account information of the customer to whom the goods or services are delivered.
- **Ship-to Contact** — A person representing the shipping customer, only when the shipping customer is of party type organization, who deals with all shipping

related issues for the order, and who typically receives the shipment. This is an optional field.

- **Ship-to Address** — A physical location where the products are sent. The ship-to address can be associated with either the ship-to customer or ship-to contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is saved.

8.1.2 Creation of Accounts

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 the *Oracle Quoting Implementation Guide*.

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.

The following table shows the behavior of Oracle Quoting based on the settings of the profile options.

Table 8–1 Quoting Behavior Based on Profile Options

| 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 party does not have any | Create account | Create account if party does not have any | NA | NA | NA |
| 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 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 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.

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.

8.2 Creating Customers

The customer is typically created in Oracle Sales Online or Oracle Receivables. Oracle Quoting offers a generic procedure for customer creation, capturing the minimum information necessary to place an order.

To create a new customer in Oracle Quoting:

Prerequisites

- **ASO: Create New Customer** must be set to **Yes** at the appropriate level.
- **ASO: Create New Shipping/Billing Customers** must be set to **Yes** to create new shipping or billing customers.

Steps

1. Navigate to the Search and Select: Customer page. You can access the Search and Select: Customer page by entering a value in the Customer field and selecting **Go** in any of the following pages:
 - Create Quote page
 - Modify Shipping and Billing page
 - Shipping and Billing page
2. Select **Create Customer**. The Create Customer page opens.
3. Enter the customer information:
 - a. Select the Organization radio button if your customer is an organization. Enter the organization's name in the text field below.

Select the Person radio button if your customer is an individual. Enter the last name, first name, and middle initial in the respective fields. Optionally, enter your customer's e-mail address in the Email field.
 - b. Optionally, enter the customer's country code in the first Phone Number field, phone number in the second field, and extension in the third field.
 - c. Select the customer address country from the Country pull-down menu.
 - d. Enter the address type, Home, Office, or another name, in the Address Name field.
 - e. Enter the customer address city in the City field.
 - f. Optionally, enter the customer address county in the County field.

- g. Enter the customer address state in the State field.
- h. Enter the customer address zip code in the Zip field.

Note: If the address combination is not set up in Oracle Receivables, an address validation error will occur. See the *Oracle Quoting Implementation Guide* for more information.

4. Select **Apply**.

8.2.1 Creating Contacts

Contacts for customers are typically created in Oracle Sales Online or Oracle Receivables. Oracle Quoting offers a generic procedure for customer contact creation, capturing the minimum information necessary to place an order.

To create a contact in Oracle Quoting:

Prerequisites

ASO: Update Customer must be set to **Yes** at the appropriate level.

Steps

1. Navigate to the Search and Select: Contact page. Select **Create Contact**. The Create Contact page opens. You can access the Search and Select: Contact page by entering a value in the Contact field and selecting **Go** in any of the following pages:
 - Create Quote page
 - General page
 - Modify Shipping and Billing page
 - Shipping and Billing page
2. Enter the contact information:
 - a. Enter the last name, first name, and middle initial in the respective fields. Optionally, enter your customer's e-mail address in the Email field.
 - b. Enter the contact's daytime, evening, and fax phone numbers, in the respective fields.
 - c. In the Country pull-down menu, select the contact address country.

- d. Enter the address type, Home, Office, or another name, in the Address Name field
 - e. Enter the contact address In the Address fields.
 - f. Enter the contact address city in the City Field.
 - g. Enter the contact address county in the County field.
 - h. Enter the contact address state in the State field.
 - i. Enter the contact address zip code in the Zip field.
3. Select **Apply**.

8.2.2 Creating Addresses

Addresses for customers are typically created in Oracle Sales Online or Oracle Receivables. Oracle Quoting offers a generic procedure for customer address creation and updating, capturing the minimum information necessary to place an order.

To create an address in Oracle Quoting:

Prerequisites

ASO: Update Customer must be set to **Yes** at the appropriate level.

Steps

1. From the Shipping and Billing Information page, navigate to the Search and Select: Address page.
2. Select **Create Address**. The Create Address page opens.
3. Enter the address information in the Create Address page as follows:
 - a. In the Country pull-down menu, select the country.
 - b. Optionally, enter an address name.
 - c. Enter the address and city.
 - d. Optionally, enter the county.
 - e. Enter the state and zip code.
4. Select **Apply**.

Entering Address and Payment Information

This section contains the processes and procedures necessary for entering and maintaining address and payment information.

- [Overview of Address and Payment Information](#)
- [Entering Shipping and Billing Information](#)
- [Entering Line-Level Shipping or Billing](#)
- [Entering Payment Information](#)

9.1 Overview of Address and Payment Information

You can designate several addresses, serving different purposes on a quote. Not all are mandatory.

- Quote-To Address — Address for the customer or contact.

The quote-to address is optional. It may be passed to the quote from an opportunity, but it is not passed into Oracle Order Management when converting a quote to an order.

- Ship-To Address — Address where the order is sent.

The ship-to address can be associated with either the ship-to customer or contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is saved.

- Bill-To Address — Address where the bill is sent.

This address can be associated with either the bill-to customer or contact. If you choose an address that is not of type bill-to, it is created as a bill-to address when the quote is saved.

You can also designate billing and shipping addresses at the line level.

Line level billing is controlled by the profile option **ASO: Enable Line Level Billing**. Line level billing is **not** supported when the payment type is Credit Card, Check or if a Purchase Order number is specified.

9.2 Address Defaulting

Addresses default into quotes, based on the following conditions, when creating quotes standalone, from opportunities, or from templates.

The application searches for and defaults only active addresses.

Quote-To

The Quote-To Address is defaulted at the time of quote creation either from the search results or as described below.

If Quote-To Customer is an Organization and the Quote-To Contact is specified, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Sold-To address type usage for the Quote-To Contact
- b. Identifying address for the Quote-To Contact

- c. Primary Sold-To address type usage for the Quote-To Customer
- d. Identifying address for the Quote-To Customer

If the Quote-To Customer is an Organization and no Quote-To Contact is specified, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Sold-To address type usage for the Quote-To Customer
- b. Identifying address for the Quote-To Customer

If the Quote-To Customer is a Person, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Primary Sold-To address type usage for the Quote-To Customer
- b. Identifying address for the Quote-To Customer

Bill-To

The Bill-To Address is defaulted at the time of quote creation based on the following conditions:

If Bill-To Customer is an Organization and the Bill-To Contact is specified, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Bill-To address type usage for the Bill-To Contact
- b. Identifying address for the Bill-To Contact
- c. Primary Bill-To address type usage for the Bill-To Customer
- d. Identifying address for the Bill-To Customer

If the Bill-To Customer is an Organization and no Bill-To Contact is specified, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Bill-To address type usage for the Bill-To Customer
- b. Identifying address for the Bill-To Customer

If the Bill-To Customer is a Person, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Bill-To address type usage for the Bill-To Customer
- b. Identifying address for the Bill-To Customer

Ship-To

The Ship-To Address is defaulted at the time of quote creation based on the following conditions:

If Ship-To Customer is an Organization and the Ship-To Contact is specified, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Ship-To address type usage for the Ship-To Contact
- b. Identifying address for the Ship-To Contact
- c. Primary Ship-To address type usage for the Ship-To Customer
- d. Identifying address for the Ship-To Customer

If the Ship-To Customer is an Organization and no Ship-To Contact is specified, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Ship-To address type usage for the Ship-To Customer
- b. Identifying address for the Ship-To Customer

If the Ship-To Customer is a Person, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Primary Ship-To address type usage for the Ship-To Customer
- b. Identifying address for the Ship-To Customer

9.3 Entering Shipping and Billing Information

To enter shipping and billing information for a quote:

Prerequisites

None

Steps

1. Select **Shipping and Billing** from the sidebar menu. The Shipping and Billing page displays.
2. The shipping and billing customer fields are automatically populated with the Quote-To Customer name and account, if any. Optionally, enter different shipping and billing customers.

Note: To create a new ship-to or bill-to customer, select **Create Customer** in the Search and Select: Customer page. This button does not appear on the page if **ASO: Create New Shipping/Billing Customers** is set to No. See [Section 8.2, "Creating Customers"](#) for more information.

3. Optionally, select a shipping contact and a billing contact.

Note: To create a new ship-to or bill-to contact, select **Create Contact** in the Search and Select: Contact page. If Quoting Security does not permit you to create a new contact, this button does not appear on the page. See [Section 8.2.1, "Creating Contacts"](#) for more information.

4. Optionally, change the shipping and billing addresses.

The shipping and billing address have default values based on the information in [Section 9.1, "Overview of Address and Payment Information"](#).

Note: To create a new ship-to or bill-to address, select **Create Address** in the Search and Select: Address page. If Quoting security does not permit you to create a new address, this button does not appear on the page. See [Section 8.2.2, "Creating Addresses"](#) for more information.

5. Optionally, select shipping method and request a delivery date.
6. Optionally, enter shipping and packing instructions.
7. Select **Apply**.

9.4 Entering Payment Information

Note: Oracle Quoting supports the use of Payment Terms Substitution. Please see [Section 7.1.5, "Terms Substitution"](#) for more information.

To enter payment information for a quote:

Prerequisites

None

Steps

1. Select **Shipping and Billing** from the sidebar.
2. In the Payment section, select or change the Payment Terms.
Payment Terms are defaulted at the time of quote creation, based on the following conditions:
 - Header-level Agreement
 - Quote-To Customer AccountPayment term defaulting can also occur when the Header-level Agreement is assigned or changed, or the Quote To Customer Account is assigned.
3. Select a payment type from the drop-down menu. Available payment types are Cash, Check, Credit Card, or blank.
4. Optionally, enter a purchase order (PO) number for the quote.
5. If the payment type is Check, enter the check number.
6. If the payment type is Credit Card, select the credit card type, and enter the credit card number, cardholder name, and credit card expiration date.
7. Select **Apply**.

Note: If Oracle *iPayment* is implemented, the application performs a credit card check. For more information, consult the *Oracle iPayment Concepts and Procedures*.

9.5 Entering Line-Level Shipping or Billing

To designate line level shipping or billing:

Prerequisites

You can only designate line billing information if the header Payment Type is **Cash** or **Blank** and the Purchase Order number is not specified.

Steps

1. Select **Lines** from the sidebar. The quote lines information displays.
2. Select the line for which to designate shipping or billing information.
3. From the Actions drop-down menu, select **Modify Shipping and Billing Information** and select **Go**. The Modify Shipping and Billing page opens.

Note: To designate shipping information, perform the following steps in the Shipping section. To designate billing information, perform the following steps in the Billing section.

4. Enter the customer name and account number.
5. Optionally, enter a contact for the customer.
6. Enter the address to which the product(s) will be billed or shipped.
7. If you are entering shipping information:
 - a. Optionally, select a shipping method.
 - b. Optionally, enter a requested delivery date.
 - c. Optionally, enter shipping and/or packing instructions.
8. Select **Apply**.

Modifying Quotes

This chapter contains information on modifying quotes in Oracle Quoting. Sections include:

- [Adding Products to the Quote](#)
- [Removing Products From the Quote](#)
- [Adding Services to Quotes](#)
- [Configuring Products](#)
- [Adding Related Product](#)
- [Checking Product Availability](#)
- [Allocating Sales Credits](#)
- [Adding Trade-Ins to Quotes](#)
- [Splitting Lines](#)
- [Viewing and Entering Quote Tax Details](#)
- [Viewing Quote History](#)
- [Linking a Quote to an Opportunity](#)
- [Changing the Base UOM for a Line](#)

10.1 Adding Products to the Quote

You can search for products to add to quotes. For information on how the product search is filtered, refer to [Section 5.5, "Using interMedia Search"](#).

To add products to the quote:

Prerequisites

None

Steps

1. Navigate to the Lines page.
2. Select **Add Product**. The Product page opens.
3. Ensure that the Source is **Product Catalog**.
4. In the Product pull-down menu, choose the product inventory category. Selecting **All** will search across all inventory categories.
5. In the text field, enter the part number or product name for an exact match, or partial information and % for a limited list.

Note: If interMedia search is enabled, you can search by Part Number, Description, or Long Description.

6. Select **Go**. The Product page lists the product(s) matching your search criteria, including part number, product description, and unit of measure.
7. Check the Select box next to the product(s) to add to the quote.
8. Optionally, select a line price list for the selected product(s).
9. Choose **Select** to add the product(s) to the quote and return to the Lines page or choose **Select and Add More** to add the product(s) and then search for additional products in different categories.

10.1.1 Line Numbers

Line numbering in Quoting are based on product type. Line numbers are formatted as follows:

The first tier, A, indicates a major line number grouping. The line numbering for this group starts with 1 and increments by 1 with each new group. This group includes the following product types:

- Standard product that is not a top level model, model component, or serviceable product
- Serviceable product without service products attached
- Service product associated with a serviceable product on a pending order or in the customer's installed base
- Top level model and selected components under the model
- Serviceable product and any service products associated with it
- Trade in a top level model
- Selected trade-in component under the trade-in model
- Trade in a standard product

The second tier, B, indicates a component within a model configuration. The first component has a value of 0, while each additional component increments by 1.

The third tier, C, indicates a service. This applies only for a service associated with a serviceable product in the current quote.

The following table shows an example of what quote line numbers look like based on product type.

Table 10–1 Line Numbers and Product Types

| Line Number | Product Type |
|-------------|-----------------------------|
| 1.0 | Standard Product |
| 2.0 | Top level model product |
| 2.0.1 | Service for model |
| 2.0.2 | Service for model |
| 2.1 | Component #1 (option class) |
| 2.1.1 | Service for component |

Table 10–1 Line Numbers and Product Types

| Line Number | Product Type |
|--------------------|---|
| 2.2 | Component #2 (Child of option class) |
| 3.0 | Service for serviceable product in the Installed Base |
| 4.0 | Serviceable product |
| 4.0.1 | Service for serviceable product |
| 4.0.2 | Service for serviceable product |

When you delete lines the line numbers are adjusted accordingly. Line numbers displayed on the quote print out match the line numbers in the Quote Lines page. Quote line numbers are not passed to Oracle Order Management when a quote is converted into an order.

10.2 Removing Products From the Quote

To remove a product from a quote:

Prerequisites

None

Steps

1. Navigate to the Lines page.
2. Select the product you want to remove.
3. Choose **Remove Line** from the Actions menu and select **Go**. The product is removed from the quote.
4. Optionally, change the quantity to zero and select **Apply** to remove products from the quote.

10.3 Adding Services to Quotes

Services are available to customers ordering serviceable products in Quoting - HTML. There are two types of services:

- **Warranties** — Services automatically included with the purchase of a product.
Warranties are defined as a component in the Bill of Materials for a serviceable product. They are included in the list price of the serviceable product and cannot be sold as separate products. Each serviceable product can ship with one or more base warranties.
- **Extended Warranties** — Services that may be purchased in addition to a product.

Services can apply to serviceable products:

- On the current quote
- In the customer's Install Base
- On a pending order

Note: You cannot associate services to products of Line Type **Return**.

To add a service to a product in the current quote:

Prerequisites

There must be a serviceable product added to the quote.

Steps

1. Navigate to the Lines page.
2. Select the line for which you want to add a service.
3. Choose **Add Services** from the Actions menu and select **Go**. The Select: Service page displays the included optional services for the line.
4. Select one or more services by checking Select box(s).
5. Optionally, use the Calendar button to select a different start date for the service.
6. Optionally, change the duration of the service.

7. Optionally, use the Period LOV to select a different period for the service.
8. Optionally, select a different price list.
9. Choose **Select** to apply the changes to your quote. The service becomes a separate line under the serviceable product.

10.3.1 Adding a Service to the Quote for a Product in the Customer's Installed Base

To add a service for a product in the Installed Base:

Prerequisites

There must be a serviceable product in the Installed Base to which you can associate the service.

Steps

1. Navigate to the Lines page.
2. Select **Add Service to Previous Purchase**.
3. Select **Installed Base** to search the customer's Install Base for a serviceable product.
4. Enter search criteria and select **Go**. You can search by:
 - Category
 - Order Number
 - Order Date
 - Product
 - Description
 - Serial Number
 - System
 - Installed At City
 - Installed At Country
 - Attribute Name
 - Attribute Value
 - Instance Number

Results show serviceable products in the customer's Install Base that meet your search criteria.

5. Select the serviceable product(s) to associate your service to and select **Add Service**.

The Select: Service page opens, displaying service reference information for the selected serviceable products and available services for that product.

6. Select the service(s) to add to the quote.
7. Use the calendar icon to select a start date for the service.
8. Optionally, change the Duration.
9. Optionally, change the Period.
10. Optionally, select a Line Price List.
11. Choose **Select** to apply your changes. The service(s) appear as separate lines on the quote.
12. Optionally, select the linked description of the service to view product details and service reference information.

10.3.2 Adding a Service for a Product on a Pending Order

To add a service to a serviceable product on a pending order:

Prerequisites

There must be a serviceable product in the Pending order to which you can associate the service.

Steps

1. Navigate to the Lines page.
2. Select **Add Service To Previous Purchase**.
3. Select **Pending Orders** from the Source drop-down menu.
4. Enter search criteria and select **Go**. You can search by Order Number, Order Date, Product, or Description or leave all fields blank.
5. Results show serviceable products on the customer's pending orders that meet your search criteria.

6. Select the serviceable product(s) to associate your service with and select **Add Service**.

The Select: Service page opens, displaying service reference information for the selected serviceable products and available services for that product.

7. Select the service(s) to add to the quote.
8. Use the calendar icon to select a start date for the service.
9. Optionally, change the Duration.
10. Optionally, change the Period.
11. Optionally, select a Line Price List.
12. Choose **Select** to apply your changes. The service(s) appear as separate lines on the quote.
13. Optionally, select the linked description of the service to view product details and service reference information.

10.3.3 Modifying a Service

To modify services after they are added to the quote:

Steps

1. Select the service to modify.
2. Choose **Modify Service** from the Actions menu and select **Go**.
3. Revise the service information.
 - a. To change the start date, use the Calendar icon.
 - b. To change the duration, overwrite the value in the Duration field.
 - c. To change the period, select a new value from the drop-down menu.
4. Select **Apply**.

10.4 Configuring Products

Note: Oracle Quoting supports multiple instantiation, through integration with Oracle Configurator. For more information, see the latest Oracle Configurator documentation.

To configure a Model product:

Prerequisites

- Verify that the product is a model by selecting the Product Details link.
- The quote must be saved.
- The user can only change the quantity of model products if **ASO: Allow Quantity Updates for Top Level Model Item** is set to **Yes**.
- The user can only change quantity for components if **ASO: Allow Quantity Updates for Component Item** is set to **Yes**.
- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote must not be submitted for batch processing.

Steps

1. Select the configurable product.
2. Choose **Configure** from the Actions menu and select **Go**. The Configurator page opens.
3. Configure the product as necessary. For more information on using Oracle Configurator, see the <Insert product doc name here>.
4. Select **Done**. The Lines page displays the total price of the configured model below the model description.

The Lines page displays the collapsed model. You can expand the model to show immediate child components. It will not display all components.

Note: A configuration is incomplete if the top level model product added to the quote using Configurator is missing mandatory components. A configuration is also incomplete if a model product was added to the quote, but Configurator has not been invoked. An incomplete configuration becomes complete after missing components are added to the model configuration.

5. Optionally, change the quantity of the top level model or one of its components by overwriting the value in the Quantity field and selecting **Apply**. If changing the quantity of the top level model product, the quantity of all the components will be updated to match the model product's quantity. If changing the quantity of a component, the top level model product and all its child components will be updated to match the quantity.

10.4.1 Deleting a Component

You can delete components of model products without launching Oracle Configurator. Configurator rules are invoked after each deletion and the incomplete indicator appears if the deletion results in an incomplete configuration. This applies to products on the quote and in quote templates. If the deletion results in an invalid configuration, you cannot save the configuration. In this case, the configurations for the model products and components revert back to the previously saved configurations.

Note: If you delete a component with an associated service, the service is deleted from the configuration as well.

Prerequisites

- **ASO: Allow Quantity Updates for Component Item** must be set to **Yes**.
- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The component must not be part of a network container model.
- The highest version of quote must be used.
- The quote must not be submitted for batch processing.

Steps

1. Navigate to the Lines page.
2. Expand the configuration for the top level model product.
3. Select the component to delete and select **Remove Line** from the Actions menu.
4. Select **Go**. The component is removed from the configuration.

10.4.2 Duplicating an Existing Configuration in a Quote

You can copy a top level model product to a new model product within a quote. When copied, the top level model product with its components is an exact copy of the original configuration.

If the original configuration has services associated with it, they are copied into the new configuration.

Line level attributes, including price list, line level billing, line level flexfields, and line level attachments are copied as well. This applies to products on the quote and in quote templates.

Prerequisites

- Verify that the product is a model by selecting the Product Details link.
- The model must not be a Network Container
- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote line must not be a service.
- The quote line must not be a model component.
- The quote line must not be a trade-in from the Installed Base.
- The quote must not be submitted for batch processing.

Steps

1. Navigate to the Lines page.
2. Select the Configuration model to copy.
3. Select **Duplicate Line** from the Actions menu.

4. Select **Go**. The duplicated configuration is added after the last line in the quote.

10.5 Duplicating a Line

When you duplicate a line, line level attributes, including price list, line level billing, line level flexfields, and line level attachments are copied into the new line. If a service is associated with the line, the service is copied as well. This applies to products on the quote and in quote templates.

To duplicate a line:

Prerequisites

- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote line must not be a service.
- The quote line must not be a model component.
- The quote line must not be a trade-in from the Installed Base.
- The quote must not be submitted for batch processing.

Steps

1. Navigate to the Lines page.
2. Select the quote line to copy.
3. Select **Duplicate Line** from the Actions menu.
4. Select **Go**. The duplicated line is added after the last line in the quote.

10.6 Adding Related Product

To add a related product to the quote:

Prerequisites

Product relationships must be set up in Oracle Inventory.

Steps

1. Navigate to the Lines page and select the product to which you want to add a related product.
2. Choose **Add Related Products** from the Actions menu and select **Go**.
3. Choose a relationship category or **All** to search across all categories and select **Go**.
4. Select the related product to add to the quote.
5. Optionally, select a price list for the related product.
6. Choose **Select**.

10.7 Checking Product Availability

To check the availability of products in a quote:

Prerequisites

None

Steps

1. Navigate to the Lines page.
2. Select **Check Availability**. The Availability Information page opens, displaying availability information for selected product, quantity and date needed.
3. Optionally, change the Need By date and select **Check Availability**.
4. Select **Done** to return to the Lines page.

10.8 Allocating Sales Credits

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

Prerequisites

The resource for allocation of sales credits must be set up in Oracle Receivables as a valid sales representative.

Steps

1. To allocate sales credits:
 - At the header level, select **Sales Credits** from the sidebar menu
 - At the line level, select **Sales Credits** from the Actions menu on the Lines page. The Sales Credits page opens.

Note: If you do not specify a header level sales credit, it will default 100% to the primary salesperson.

If you do not specify a line level sales credit, the existing header level sales credit is assigned to the line by default.

If you assign a sales credit to a line and exit without selecting **Update**, the header level sales credit is defaulted into the line.

However, once you assign a line level sales credit and select **Update**, the header level sales credit information no longer applies.

2. To allocate revenue sales credits:
 - a. In the Revenue Sales Credits section, select **Add Person**.
 - b. To search for sales representatives for sales credit allocation:
 - * Choose a category from the Search pull-down menu
 - * Enter the sales representative's name or the wildcard character and a partial name in the adjacent text field
 - * Select **Go**. The page refreshes, showing your search results
 - c. Highlight the Select radio button adjacent to the appropriate sales representative and choose **Select**. The Assign Sales Credits page refreshes,

showing the sales representative in the Revenue Credits sales representative listing.

- d. Optionally, select a sales group for the sales representative.
- e. For each sales representative, choose a revenue credit type from the pull-down menu in the Credit Type column.
- f. Indicate the percentage of sales credits each sales representative should receive if this quote is placed as an order, in the text field in the Credit Percent column.

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

- g. Select **Apply** to save your changes.
 - h. Optionally, select **Revert** to revert to your last-saved changes.
 - i. Optionally, to remove a sales representative from the Revenue Credits section, check the Select checkbox for the appropriate sales representative and select **Delete**.
3. To allocate non-revenue sales credits:
- a. In the Non-Revenue Credits section, select **Add Person**.
 - b. To search for sales representatives for non-revenue credit allocation:
 - * Choose a category from the Search pull-down menu
 - * Enter the sales representative's name or the wildcard character and a partial name in the adjacent text field
 - * Select **Go**. The page refreshes, showing your search results
 - c. Highlight the Select radio button adjacent to the appropriate sales representative and select **Select**. The Assign Sales Credits page refreshes, showing the sales representative in the Non-Revenue Credits sales representative listing.
 - d. Optionally, select a sales group for the sale representative.
 - e. For each sales representative, choose a non-revenue credit type from the pull-down menu in the Credit Type column.

- f. Indicate the percentage of non-revenue credits each sales representative should receive, if this quote is placed as an order, in the text field in the Credit Percent column.
- g. Select **Apply** to save your changes.
- h. Optionally, select **Revert** to revert to your last-saved changes.
- i. Optionally, to remove a sales representative from the Non-Revenue Credits section, check the Select checkbox for the appropriate sales representative and select **Delete**.

10.9 Adding Trade-Ins to Quotes

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

When the application calculates the order total, it recognizes products with the line type **Return** as trade-ins. The application treats trade-in prices as credits and subtracts them from the order total. Pricing, taxes, and shipping charges are calculated for trade-ins, for the current date.

You can also search the current quote-to customer's Install Base for trade-ins. Install Base only supports the trade-in of serialized products with a line flow of "Return with Receipt." You can search the Install Base by:

- Category
- Order Number
- Order Date
- Product
- Description
- Serial Number
- System
- Installed At City
- Installed At Country
- Attribute Name
- Attribute Value

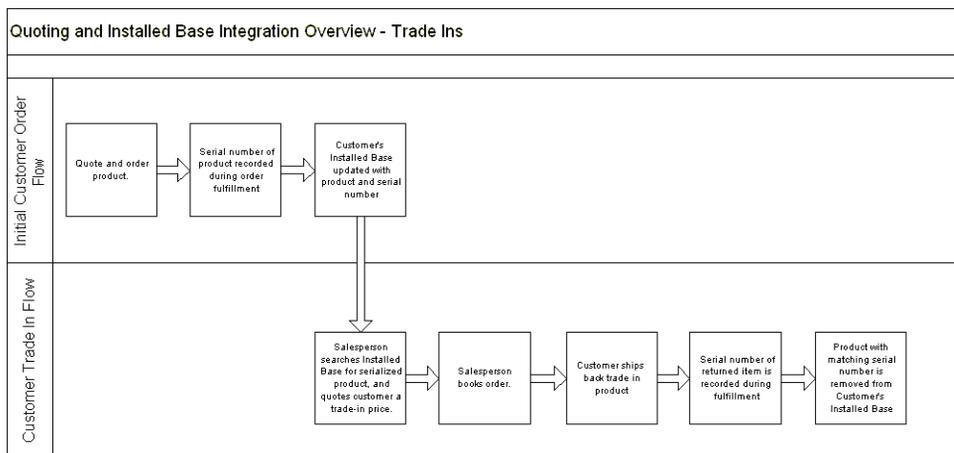
- Instance Number

You can also leave all fields blank and allow Install Base to return all products that are active, returnable, and serialized.

You can select a model product for trade-in as long as it is serialized. If selected, the model product and its children default into the quote as trade-ins. The children do not need to be serialized to be traded in with the model product. Once defaulted, you can remove one or more children. You can also select a child of a model product without selecting the model product, if the child is serialized and returnable.

You can override trade-in product prices manually, as detailed in [Section 7.1.4, "Manual Adjustments"](#)

Quoting supports the following trade-in flow:



This flow demonstrates what occurs when a customer purchases a product and then decides to trade it in. Initially, a salesperson creates a quote for the product and converts it into an order. The serial number of the product is recorded in the Shipping module and the customer’s Install Base is updated with the product information. The customer then decides to return the product. In Quoting, the salesperson searches the customer’s Install Base for the serialized product and quotes a trade-in price. If the price is satisfactory, the salesperson submits the quote as an order. The customer then ships the product to return. When the returned product is received, the serial number of the product is entered in Shipping and the customer’s Install Base is updated to reflect that the trade-in was returned.

10.9.1 Adding a Trade-in to the Current Quote

To add a trade-in to a quote:

Prerequisites

- **ASO: Enable Line Type** must be set to **Yes** at the appropriate level.
- The order type must be **Mixed**.
- The product total of the quote must exceed the value of the trade in(s).

Steps

1. Navigate to the Lines page.
2. Select **Add Product**.
3. Using the procedure outlined in [Section 10.1, "Adding Products to the Quote"](#), search for and select the product you want to trade-in.
4. Choose **Adjust Pricing** from the Action menu and select **Go**. The Adjust Pricing page opens.
5. In the Summary section, change the Line Category Code to **Return**.
6. Select **Return** from the Line Type drop-down menu.
7. Select **Apply**.

On the Line page the Unit Net Price will appear in brackets, indicating that the value is negative.

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

8. Optionally, view line details by selecting the linked trade-in description.

10.9.2 Adding a Trade-in From the Customer Install Base

To add a trade-in from the customer Install Base to a quote:

Prerequisites

The order type must be **Mixed**.

Steps

1. Navigate to the Lines page.
2. Select **Add Product**.
3. Select **Installed Base** from the Source drop-down menu.
4. Enter search criteria and select **Go**. The results matching your search criteria display at the bottom of the page.

Note: In order for Install Base to be updated with return information, each trade-in must be serialized products with a line type of **Return Receipt Required**.

5. Optionally, select the View Relationships icon. This icon appears for Configurator model products only. The View Relationships page displays the components of the model.
6. Select the product(s) to trade-in.
7. Optionally, select a line price list for the product(s).
8. Choose **Select** to add the trade-in(s) to the quote and return to the Lines page or choose **Select and Add More** to add the trade-ins and then search for additional trade-ins in different categories.

On the Lines page the Unit Net Price will appear in brackets, indicating that the value is negative.

9. Optionally, view line details by selecting the linked trade-in description.

10.10 Splitting Lines

To split a line:

Prerequisites

- The quantity of the line you want to split must be greater than 1.
- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote line must not be a service.
- The quote line must not be a model component.
- The quote line must not be a trade-in from the Installed Base.
- The quote must not be submitted for batch processing.

Steps

1. Navigate to the Lines page.
2. Select the line you want to split.
3. Choose **Split Line** from the Actions menu and select **Go**. The Split Line page opens.
4. In the Split field, enter the quantity to split into another line.
5. Select **Apply**. The Lines page displays the split quantities as separate lines.

10.10.1 Splitting a Configured Line

If you split a configured line, the new model and its components appear on a separate line as an exact duplicate of the original line. The relationships are preserved. All service items and line attributes (price list, line level billing, line level shipping, line level attachments, etc.) are copied as well.

To split a configured line:

Prerequisites

- The quantity of the line you want to split must be greater than 1.
- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote line must not be a model component.
- The model must not be a Network Container.

Steps

1. Navigate to the Lines page.
2. Select the model product line to split.
3. Choose **Split Line** from the Actions menu and select **Go**. The Split Line page opens.
4. In the Split field, enter the quantity you want to split into another line.
5. Select **Apply**. The Lines page displays the split quantities as separate lines.

10.11 Viewing and Entering Quote Tax Details

To enter tax exemption information for a quote. Tax handling options are located on the Pricing page.

There are three tax options:

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

Prerequisites

None

Steps

1. Select **Pricing** from the sidebar menu. The Pricing page opens.
2. Use the Tax Handling LOV to select the tax method.

If you select Exempt, then:

- * Select an Exemption Reason from the drop-down menu.

The menu displays tax exemption reasons defined in the Receivables QuickCodes window.

- * Enter the exempt number in the Exempt Number field.

3. Select **Apply**.

10.12 Viewing Quote History

To view the history of the current quote:

Prerequisites

None

Steps

1. Select **Versions** from the sidebar menu. The Versions page displays all versions of the current quote.
2. Select the linked version number to access an overview of the quote version.

10.13 Linking a Quote to an Opportunity

To link a quote to an opportunity:

Prerequisites

None

Steps

1. Navigate to the General page.
2. Enter a partial value and a wildcard and select **Go**. The Search and Select: Opportunity page opens.
3. Select to search by Name or Number, enter a value in the text field, and select **Go**.
4. Select the opportunity and choose **Select**.

10.14 Entering Sales Supplement Information

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

To enter Sales Supplement information:

Prerequisites

- **ASO: Enable Sales Supplement** must be set to **Yes** at the appropriate level.
- Sales Supplement templates must be set up in Oracle Quoting - Forms.

Steps

1. Navigate to the Sales Supplement page.
2. Select a template from the Template drop-down menu. The page refreshes, displaying the template.
3. From the View drop-down menu choose the section in which you want to enter information and select **Go**. The page displays the section with editable fields.
4. Enter information into the appropriate fields and select **Apply** to save your changes.

Note: Once you enter responses and save, you cannot change the template.

10.15 Changing the Base UOM for a Line

To change the base UOM for a line:

Prerequisites

None

Steps

1. Select the line for which you want to change the UOM.
2. Select **Adjust Pricing** from the Actions drop down box and select **Go**. The Adjust Pricing page opens.
3. In the Summary section, use the drop-down menu to change the UOM.

The UOM drop-down menu displays only UOMs that are valid for the selected product. If the selected UOM is not valid for the selected Price List, an error message appears.

Copying Quotes

This section contains information on copying quotes.

- [Overview of Copying a Quote](#)
- [Copying Quotes](#)

11.1 Overview of Copying a Quote

In Oracle Quoting you can copy existing quotes to create new quotes. You can only copy quotes for the same customer.

The table below lists the information copied in each Copy Quote method.

Table 11–1 Copy Quote Behavior

| | Copy to New Quote |
|--|--------------------------|
| Quote Name | Yes |
| Quote Number | No |
| Version Number | No |
| Opportunity | No |
| Contract Template | Yes |
| Contract Number | No |
| Contract Approval Level | No |
| Expiration Date | No |
| Status | No |
| Published Flag | No |
| Sales Channel | Ye |
| Campaign | Yes |
| Primary Salesperson | Yes |
| Primary Sales Group | Yes |
| Order Number | No |
| Customer (party and account) | Yes |
| Contact | Yes |
| Quote-To Address | Yes |
| Ship-To Customer (Party and Account)/Contact/Address at Header Level and Line Level | Yes |
| Shipping Method, Shipping Instructions, Packing Instructions, Requested Delivery Date at Header and Line Level | Yes |

Table 11-1 Copy Quote Behavior

| | Copy to New Quote |
|---|--------------------------|
| Bill-To Customer (Party and Account)/Contact/Address at Header Level and Line Level | Yes |
| Payment Terms at Header Level | Yes |
| Payment and Tax Information at Header and Line Level | Yes |
| Regular Products, Configured Products, Services and their reference source, Quantity, and UOM | Yes |
| Manual Price Adjustments | Yes |
| Automatic Price Adjustments | Yes |
| Currency at Header Level | Yes |
| Price List at Header Level and Line Level | Yes |
| Pricing Agreement at Header Level | Yes |
| Promotion Codes at Header and line Level | Yes |
| Line Types | Yes |
| Line Category Code | Yes |
| Order Type | Yes |
| Sales Credits at Header and Line Levels | Yes |
| Attachments | No |
| Notes | No |
| Tasks | No |
| Descriptive Flexfields at the Header and Line Level | Yes |
| Sales Team | No |
| Approval History | No |
| Sales Supplement | No |
| Pricing Updated On | No |
| Pricing Status | No |

Table 11–1 Copy Quote Behavior

| | Copy to New Quote |
|----------------|--------------------------|
| Tax Updated On | No |
| Tax Status | No |

11.2 Copying Quotes

To copy a quote into a new quote:

Prerequisites

None

Steps

1. In the Quotes page, select the quote to copy.
2. Select **Duplicate**. The Quote Overview page displays the new quote.

Creating Proposals from Quotes

This chapter covers proposals integration.

- [Overview of Proposals](#)
- [Creating a Proposal](#)
- [Viewing Proposal Details](#)

12.1 Overview of Proposals

Integration with Oracle Proposals allows sales representatives to create proposals based on quotes and submit them to customers. Oracle Proposals streamlines proposal creation by automating time- and resource consuming tasks. You can generate proposals from templates that package recurring proposal elements such as cover letters, executive summaries, and product descriptions.

When creating a proposal from Quoting, essential quote information, such as the customer name, is automatically pulled into the proposal.

12.2 Creating a Proposal

To create a proposal:

Prerequisites

- The quote is not expired
- The quote has not been submitted for batch pricing call
- The quote is not in Order Submitted status
- The highest version of the quote must be used.
- Pricing and Tax status must be Complete.

Steps

1. Select **Proposals** from the Sidebar menu.
The Proposals page lists all proposals created for the quote.
2. Select **Create Proposal**.
3. Following the instructions listed in the *Oracle Proposals User Guide*.

12.3 Viewing Proposal Details

To view proposal details:

Prerequisites

Steps

1. Select **Proposals** from the Sidebar menu.
2. Select the hyperlinked name of the proposal to view details.

The proposal details display.

Initiating Approvals

This chapter discusses the approval process in Quoting.

- [Overview of Approvals](#)
- [Initiating an Approval](#)
- [Viewing Approval Details](#)
- [Cancelling the Approval Process](#)
- [Approving a Quote](#)
- [Rejecting an Approval](#)
- [Reassigning an Approval](#)

13.1 Overview of Approvals

Oracle Quoting uses the Oracle Approvals Management (OAM) engine to define rules governing approvals. Within OAM, a situation or rule requiring approval is defined using Attributes, Conditions, and Approval Type.

Attributes are used to define Conditions, and Approval Type determines the contents and hierarchy of the approvers. One or more Conditions and an Approval Type constitute a Rule.

A quote can be submitted for approval **only** if it meets the following conditions:

- The logged in user has update access to the quote.
- The highest version of the quote must be used.
- There is a transition defined from the current quote status to *Approval Pending*.

13.2 Initiating an Approval

When you initiate an approval, you can view the list of approvers and rules applicable to the quote, if any. If Contracts integration is enabled, you can specify that a non-standard contract is required by using the checkbox, so that the quote status becomes Contract Required instead of Approved when all business approvals are received for the quote. If you do not require a non-default contract, the quote status changes to Approved when all approvals are received for the quote.

The ability to skip approvers is determined by the profile option **ASO: Allow Skip Approvers**. When set to **Yes** you may skip approvers. If set to **No**, approvers cannot be skipped.

To initiate an approval:

Prerequisites

- **ASO: Enable Approvals** must be set to **Yes** at the appropriate level.
- The highest version of the quote must be used.
- There is a transition defined from the current quote status to *Approval Pending*.

Steps

1. Navigate to the Approvals page.
2. Select **Initiate Approval**. The Initiate Approvals page opens, displaying the approvers and applicable rules for the approval process.

3. Optionally, enter comments.
4. Optionally, select the checkbox if a non-standard contract is required.
5. To begin the approval chain with the next approver in the hierarchy, select **Obtain approvals from the entire list of approvers**.
6. To skip approvers, choose the **Obtain approval from the list of approvers starting with** radio button and select the approver from the drop-down menu.
7. Select **Submit**. The Approvals page displays confirmation that the quote was submitted for approval. An email is sent to the next approver.
8. Optionally, select **Cancel Approval Process** to stop the approval process.
9. Optionally, select the linked Result to view the approval detail.

13.3 Viewing Approval Details

To view approval details:

Prerequisites

ASO: Enable Approvals must be set to **Yes** at the appropriate level.

Steps

1. Navigate to the Approvals page.
2. Select the approval Result link, to view details. The Approval Details page opens.
3. Optionally, select the Approver Comments link to view each approver's comments.
4. Optionally, select the Notification Detail link to view notifications sent to each approver.
5. Select **Done** to exit the page.

13.4 Cancelling the Approval Process

To cancel an approval process:

Prerequisites

None

Steps

1. Navigate to the Approvals page.
2. Select **Cancel Approval Process**. The page refreshes, displaying confirmation that the process was canceled.

13.5 Approving a Quote

Once an approval is initiated, it is passed on to the next approver. Each approver in the hierarchy receives notification that the quote is ready for approval when it is their turn to approve.

Refer to *Oracle Workflow Guide* for more information.

To approve a quote:

Prerequisites

ASO: Enable Approvals must be set to **Yes** at the appropriate level.

Steps

1. Login to Oracle Self Service Applications.
2. Select **Workflow Administrator Web Applications**.
3. Select **Worklist**.
4. Select the notification for the quote requiring approval.
5. To view quote details, select **Click Here For Quote Details**. The Quote Overview page opens.

If you are logged into OSO or the Quoting - HTML UI, the Quote Overview page opens. If not, the JTF login page opens and you must log in to access the Quote Detail page.

6. Navigate back to the Workflow form.

7. Optionally, enter comments.
8. Select **Approve**.

13.6 Rejecting an Approval

To reject an approval:

Prerequisites

ASO: Enable Approvals must be set to **Yes** at the appropriate level.

Steps

1. Follow steps 1 through 7 in [Section 13.5, "Approving a Quote"](#) above.
2. Select **Reject**. The quote status is now Approval Rejected.

13.7 Reassigning an Approval

To reassign an approval.

Prerequisites

ASO: Enable Approvals must be set to **Yes** at the appropriate level.

Steps

1. Follow steps 1 through 7 in [Section 13.5, "Approving a Quote"](#) above.
2. Select **Reassign**.
3. Select the person to whom you want to assign the approval.
4. To transfer ownership, select the **Transfer ownership of this notification** radio button.
5. To delegate authority for the notification, select the **Delegate authority for responding to this notification** radio button.
6. Optionally, enter comments.
7. Select **OK**.

Applying Contracts to Quotes

This chapter covers contracts.

- [Overview of Contracts](#)
- [Creating a Contract with Non Default Terms and Conditions](#)

14.1 Overview of Contracts

The objective of Quoting/Contracts integration is to automate the creation and delivery of quotes with default or negotiated terms. Contracts integration into Quoting includes the following:

- Automatic creation and delivery of quotes with default terms and conditions, without involving a contract administration team.
- Ability to request the assistance of a contract specialist to create or modify non-default terms.
- Ability to print a quote with or without default or negotiated terms and conditions.
- Support for contract integration during order placement and publishing.
- Ability to view contract reference, summary information, and terms and conditions from Quoting.

Contracts integration is controlled by the profile option **ASO: Enable Use Contracts**. If the profile is set to **No**, all menu options, buttons, and links related to Contracts integration are disabled.

Note: You cannot remove a contract once it is associated with a quote. You must change the status to Contract Canceled.

14.1.1 Quotes and Contract Versioning

If a quote has an instantiated contract attached to it, the latest version of the contract is attached to the quote.

You cannot create a new version of a quote that has a contract attached to it. The instantiated contract is always attached to the latest version of the quote.

Note: If you copy a quote with an attached contract to a new quote, the contract will not copy.

14.1.2 Contracts Quote Statuses

The following quote statuses support Contracts Core integration. For more information on quote statuses, see [Chapter 3.1.2, "Quote Status"](#).

- **Contract Required** — A quote was approved but the quote needs contract authoring. The sales representative can request contract creation from this status.
- **Contract Pending** — A contract is being authored by a contract specialist. This is a read only status.
- **Contract Canceled** — The contract was canceled by the contract specialist. This is a read only status.
- **Contract Approved** — The contract was approved.

14.2 Creating a Contract with Non Default Terms and Conditions

To create a contract with non default terms and conditions:

Prerequisites

- **ASO: Enable Use Contracts** must be set to **Yes** at the appropriate level.
- A contract administrator must be designated in **OKC: Default Contract Administrator for notifications**.
- There must be a transition from the current status to **Contract Pending**.
- There must be an account designated for the quote.

Steps

1. Navigate to the Contracts page by selecting **Contracts** from the sidebar.

Note: To review Standard Terms and Conditions, select **Review Terms and Conditions** on the Contracts page.

2. Select **Request Contract Creation**.
3. Enter Comments and select **Submit**. The Contracts page displays details about the standard contract. The contract creation request is submitted to the contract specialist. The Contract Specialist then submits the contract to the Contract Administrator once the appropriate changes are made.

The Contracts page displays details about the contract. The quote is now in Contract Pending status.

Note: After the contract is created and approved by the Contract Administrator, you can select **Request Contract Creation** to request additional modifications to the terms and conditions.

Enabling Quoting Security

This chapter outlines the procedures necessary to enable and use Quoting Security.

- [Overview of Security](#)
- [Adding a Resource to the Quote Sales Team](#)
- [Changing the Primary Sales Agent](#)

15.1 Overview of Security

Quoting Security is composed of three essential components:

- Quote Access Security
- Quote Function Security
- New Quote Security

Quote Access Security

Quote Access Security designates what quotes the user may access. A user should only have access to quotes for the sales team the user belongs to and, if the user is a manager, for the sales teams where the user's subordinates are members.

Quote Access Security also determines whether the user has update or view-only access to their quotes.

Quote Function Security

Quote Function Security determines whether there are user restrictions on particular quote functionality. For example, a user can be restricted from placing orders.

This security is controlled by profile options and/or permissions assigned to a user or responsibility.

New Quote Security

New Quote Security determines if users can create new standalone quotes and for which customers.

Primary Sales Agent

The Primary Sales Agent for a quote has quote ownership responsibility. The quote creator must be set up as a valid resource in Resource Manager and as a sales representative to default as the Primary Sales Agent.

If the quote creator does not meet these criteria, the sales representative selected in the profile option **ASO: Default Salesrep** will default as the primary sales agent. For more information on Primary Sales Agents, see the *Oracle Quoting Implementation Guide*.

Note: The user cannot save or submit a quote without a primary sales agent.

15.1.1 Quote Access Security

Quote Access Security is controlled by the profile options **ASO: Enable Security Check**. When the profile is disabled, users have access to all quotes. When it is enabled, quotes access is restricted based on:

- **Quote Availability Security** — Restricts the quotes available to users based on hierarchy and sales teams.
- **Quote Data Security** — Determines if users have update or view-only access to quotes.

15.1.1.1 Quote Availability Security

Quote availability security restricts the quotes available to each user. A user must be set up as a valid resource in order to view quotes when security is enabled. If the user is a valid resource, the following quotes are available to that user:

- All quotes where the user is on the quote sales team. This includes all quotes created by the user and all the other users on the quote sales team.

If the user is a manager, the following quotes are also available:

- All quotes for teams where the user's subordinates are members

15.1.1.2 Quote Data Security

Quote Data Security is controlled by the Full Access checkbox on the Sales Team page. Full access allows the user to modify any quote field and perform any function that is not restricted by other Quoting requirements. If the quote is changed to a read only status, the user may only update the payment information and other fields that are updateable for read only statuses.

If a user has view-only access to a quote, the user cannot modify fields or perform any function on the quote.

Manager Access

Managers have access to quotes for sales teams to which their subordinates belong. The level of manager access is a combination of the level of subordinate access and the profile option **ASO: Manager Role Access**.

If the profile is set to Update, the manager can update all quotes for the sales team(s) their subordinates belong to.

If the profile is set to Inherit, the manager has the same access level as the subordinate. If the profile is set to Inherit and the manager has multiple

subordinates on the team with different access levels, the manager should inherit the highest access level.

15.1.2 Quote Function Security

Quote function security determines what actions a user with update access can perform. Profile options and permissions restrict the following functionality and allow the user to:

- Override a quote status — The value of profile option **ASO: Status Override** controls the user ability to update a quote when it is in read only status. This ensures that the user can override quote data if a mistake was made before the quote was transitioned to a read only status.
- Override the price list — The value of profile option **ASO: Price List Override** controls the user ability to change the selected price list for a quote. This functionality ensures that a user does not inadvertently quote an inaccurate price based on the selection of an incorrect price list.
- Create new customers — The value of profile option **ASO: Create New Customer** controls a user's ability to create new customer information. This functionality ensures that customers wishing to protect the integrity of customer data can restrict the creation of new customers to a limited number of users.
- Update customer information — The value of profile option **ASO: Update Customer** controls the user ability to create new customer contacts and addresses.
- Update sales team information — The value of profile option **ASO: Update Sales Team** controls the user ability to manually update sales team information, including manual assignment of the primary sales agent.

For more information on the Quote Function Security profile options, see the *Oracle Quoting Implementation Guide*.

15.1.3 New Quote Security

New Quote Security restricts the parties for which a sales agent can create quotes. It is governed by the profile option **ASO: New Quote Security**. If set to **Yes**, the user cannot create new standalone quotes or copy existing quotes to new quotes. The user can create quotes from opportunities.

If this profile is set to **No**, the user can create quotes for all customers.

If the profile option is set to **Sales Team**, the user must be on the account sales team for the customer in order to select that customer in the quote header or copy a quote for the customer.

Note: For integrated Quoting, account sales team information is collected from either Oracle TeleSales or Oracle Sales Online.

15.2 Adding a Resource to the Quote Sales Team

To add a resource to the quote sales team:

Note: The Keep Flag is not supported in this release.

Prerequisites

You must have **ASO: Update Sales Team** set to **Yes** at the appropriate level.

Steps

1. Navigate to the Sales Team page.
2. Select **Add Person**. The Search and Select: Person page opens.
3. Enter search criteria and select **Go**.
4. In the results section, select the resource you want to add to the sales team.
5. Choose **Select**. The Sales Team shows the new sales team member.
6. Optionally, select a sales group for the new team member.
7. Optionally, select the Full Access checkbox to allow update access.
8. Select **Apply**.

15.3 Changing the Primary Sales Agent

To assign a new primary sales agent:

Prerequisites

- **ASO: Update Sales Team** must be set to **Yes** at the appropriate level.
- The person that you want to act as the Primary Sales Agent must be set up as a valid resource in Resource Manager and as a sales representative.

Steps

1. Navigate to the General Page.
2. In the quote header, use the Salesperson LOV to select a new primary sales agent.
3. **Save** the quote.

Notes, Tasks, and Attachments

This section contains the processes and procedures necessary to view, add, and modify notes, tasks, and attachments.

- [Overview of Notes, Tasks, and Attachments](#)
- [Adding Notes to a Quote](#)
- [Searching for Notes](#)
- [Creating a Task](#)
- [Searching for Tasks](#)
- [Modifying a Task](#)
- [Deleting a Task](#)
- [Creating an Attachment](#)
- [Viewing an Attachment](#)
- [Deleting an Attachment](#)

16.1 Overview of Notes, Tasks, and Attachments

Notes — Notes contain descriptive information generated by users about business transactions. Users can reference notes for additional information about specific quotes.

Tasks — Tasks include actions that must be performed by the assigned user. You can add and assign tasks in Oracle Quoting.

Attachments — Users can add attachments to their quotes depending on their business needs, to store relevant documents or files along with orders in Order Management. For example, you can attach communications from customers or sales representative's notes.

16.2 Adding Notes to a Quote

To create notes for a quote:

Prerequisites

None

Steps

1. Navigate to the Notes page by selecting **Notes** from the sidebar menu.
2. Select **Create**.
3. Select a note Type and Status.
4. Enter the note text in the Note field.
5. Optionally, select **More** to enter additional text beyond the character limit in the main notes text box.
6. Optionally, relate the note to another note.
7. Select **Create** to create the note.
8. Select **Create and Create Another** to create the note and begin another new quote.

16.3 Searching for Notes

To search for notes:

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

Prerequisites

None

Steps

1. Navigate to the **Notes** page by selecting Notes from the sidebar.
2. Choose the note Type and select **Apply**.
The page displays the matching notes.
3. View all notes for the quote by selecting **All Notes**.

16.4 Creating a Task

To create a task:

Prerequisites

None

Steps

1. Navigate to the Tasks page by selecting **Tasks** from the sidebar.
2. Select **Create**.
3. Fill out the Create Tasks form as described in the *Oracle CRM Application Foundation Concepts and Procedures*.

16.5 Searching for Tasks

To view all tasks associated with a quote:

Prerequisites

None

Steps

1. Navigate to the Tasks page by selecting **Tasks** from the sidebar.
2. Select if you want to view the Source or References.
3. Optionally, enter a date range.
4. Optionally, select the task type.
5. Optionally, select the priority.
6. Optionally, select the status.
7. To include private tasks, select the Include Private checkbox.
8. Select **Apply**.

The page displays all matching tasks.

9. To view the task detail, select the linked task number.

16.6 Modifying a Task

To modify a task:

Prerequisites

None

Steps

1. Navigate to the Tasks page by selecting **Tasks** from the sidebar.
2. Select the linked task number.

The Task Details page opens.

3. Make the necessary changes and select **Update**.

16.7 Deleting a Task

To delete a task:

Prerequisites

None

Steps

1. Navigate to the Tasks page by selecting **Tasks** from the sidebar.
2. Select the Remove checkbox for the task.
3. Select **Update**.

16.8 Creating an Attachment

In the HTML UI, all attachments belong to the Miscellaneous category. Only attachments with the document type *File* are supported.

To create an attachment:

Prerequisites

- The highest version of the quote must be used.
- The user must have update access to the quote.

Steps

1. Select **Attachments** from the sidebar.
The Attachments page opens.
2. Select **Add Attachment**.
3. Enter the file name or select **Browse** to search for the file.
4. Enter a description for the attachment and select **Apply**.
The attachment shows in the Attachments page.

16.9 Viewing an Attachment

To view a document that is attached to a quote:

Prerequisites

The quote containing the attachments you want to view must be displayed in the Quote Overview page.

Steps

1. Select **Attachments** from the sidebar.
2. Select the linked attachment name.

16.10 Deleting an Attachment

To remove an attachment from a quote:

Prerequisites

- The highest version of the quote must be used.
- The user must have Update access to the quote.
- The quote must not be in a read-only status.

Steps

1. Display the quote you want to remove the attachment from.
2. Select **Attachments** from the sidebar.
3. Select the attachment to delete.
4. Select **Delete**.

Publishing and Printing

This section contains the processes and procedures necessary to print and publish quotes in Oracle Quoting.

- [Overview of Printing](#)
- [Printing a Quote](#)
- [Overview of Publishing Quotes](#)
- [Web Publishing a Quote](#)

17.1 Overview of Printing

The ability to print a quote allows you to offer customers hard copies of quotes created in Oracle Quoting.

The print outs for Print Quote vary depending on whether or not the quote is executable. A quote is executable if there is a valid transition from the current quote status to *Order Submitted* status.

The non-executable Print Quote report displays key information available to you in the Oracle Quoting UI in addition to a customizable disclaimer:

- Quote information — Quote number, revision, date, expiration date, header level payment term
- Customer information — Customer name, address, email address, and phone number; ship-to customer name, address, and phone number; bill to customer name, address, and phone number
- Pricing Agreement information — Agreement name, number, revision, and revision date
- Line information — Product number and description, UOM, Qty, Unit Net Price, Total Net Price, Sales Tax, Configurations for model products, Total price for model products
- Attachments — Text type header attachments that are associated with the document category **Miscellaneous**
- Charges — Quote line level charges and a summary of charges for entire quote

The following information is added if the quote is executable:

- Contract Information — Terms and Conditions for a contract associated with the quote

Note: Contract information is only available on the Print Quote report if Contracts integration is enabled.

- Signature block

There are templates available from which you can choose the print quote layout. The seeded option is **Default Print Layout**. You can also choose to output format. The seeded output formats are: PDF format or Rich Text Format (RTF). Oracle Quoting uses Oracle Reports *6i* to produce the Print Quote report.

17.2 Printing a Quote

To print a quote:

Prerequisites

The highest version of the quote must be used.

Steps

1. From the Quotes page, select on the quote name link.
The Overview page opens.
2. Select **Print Quote** from the Actions menu and select **Go**.
Depending on your browser, either a browser window opens displaying the printout or you are asked to open or save the printout.
3. Select the Output Format from the drop-down menu.
4. Select the checkbox if you want to:
 - Show subtotal by product category
 - Show Price Adjustments
 - Show Header Attachments (text type only)
 - Show Charges
 - Print in executable mode (This option will not appear if the quote is not executable.)
5. Select a template from the drop-down menu.
6. Select Submit.
7. If you need a paper copy of the quote, choose your browser's Print option to print the report.

17.3 Overview of Publishing Quotes

Sales representatives have the ability to share quotes with customers by web publishing. A quote version may be web published if it meets all of the following conditions:

- The user has update access to the quote
- The highest version of the quote must be used
- The quote is not in Order Submitted or Inactive status
- The quote is not expired
- If the customer is of type organization, a contact has been specified
- There is at least one specialty store in which the quote can be web published

Note: If a web published quote does not meet all of the aforementioned criteria after it is web published, the Publish flag still indicates that it is web published, but it will not show up in the customer facing UI.

If the customer is of type Person, the sales representative publishes the quote directly to the customer. If the customer is of type Organization, the sales representative publishes the quote to the contact. A quote version can only be published to an FND_USER. Oracle Quoting verifies that the customer/contact is an FND_USER. If the customer is not an FND_USER, the sales representative can create an FND_USER for the customer by entering a username when attempting to publish a quote.

17.4 Web Publishing a Quote

To web publish a quote:

Prerequisites

- **ASO: Enable Web Publishing** must be set to **Yes** at the appropriate level.
- The user must have Update access to the quote.
- The highest version of the quote must be used.
- The quote is not in Ordered or Inactive status.
- The quote is not expired.
- If the customer is of type organization, a contact has been specified.
- There is at least one specialty store in which the quote can be web published.

Steps

1. Navigate to the Overview page.
2. Choose **Web Publish Quote** from the Actions menu and select **Go**.
3. If the customer is not an FND_USER, you will be prompted to enter a User Name. The system auto generates a password and creates an FND_USER for the customer. This information is then emailed to the customer.
4. Select the store the quote will be published to.
The Specialty Store ID will be stored in the quote header.
5. Select whether to send the email to an existing address or a new address.
6. Optionally, enter comments and select **Submit**.

In the Overview page, you receive a confirmation that the quote was published.

17.4.1 Unpublishing a Quote

To unpublish a previously published quote:

Prerequisites

- **ASO: Enable Web Publishing** must be set to **Yes** at the appropriate level.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote is not in Ordered or Inactive status.

Steps

1. Navigate to the Overview page.
2. Choose **Web unPublish Quote** from the Actions menu and select **Go**.

In the Overview page you receive a confirmation that the quote was unpublished.

Placing Orders

This section contains information about submitting orders to Oracle Order Management.

- [Overview of Placing Orders](#)
- [Placing an Order](#)

18.1 Overview of Placing Orders

When you submit an order in Oracle Quoting, the quote passes into an order using Oracle Order Management.

18.2 Placing an Order

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

To place an order:

Prerequisites

- There is a valid transition defined from the current status to *Order Submitted*.
- The user must have Update access to the quote
- The highest version of the quote must be used.
- **ASO: Enable Submit Button** is set to **Yes** at the appropriate level.
- There is at least one line in the quote.
- The quote is not expired.
- The quote must not be submitted for batch pricing.

Steps

1. Navigate to the Quote Overview page.
2. Add products to the quote, if necessary. See [Section 10.1, "Adding Products to the Quote"](#) for instructions.

3. Adjust discounts. This is an optional step. It is only necessary if there is a discount you wish to apply to the order. See [Chapter 7, "Pricing Products and Quotes"](#).
4. If the billing and shipping information has not been entered, then enter it.
5. If the payment information has not been entered, then enter it.
6. From the Actions menu, select **Place Order**.

The Overview page refreshes, displaying confirmation that the quote was submitted as an order. The Order Number displays as a link.

7. Select the Order Number link to view the order details.

Part III

User Procedures - Forms

This part contains the following chapters:

- Chapter 19, "Using Folder Functionality"
- Chapter 20, "Creating Quotes"
- Chapter 21, "Searching"
- Chapter 22, "Credit Checks"
- Chapter 23, "Pricing Products and Quotes"
- Chapter 24, "Customers and Relationships"
- Chapter 26, "Modifying Quotes"
- Chapter 25, "Entering Address and Payment Information"
- Chapter 27, "Copying Quotes"
- Chapter 28, "Initiating Approvals"
- Chapter 29, "Notes and Attachments"
- Chapter 30, "Applying Contracts to Quotes"
- Chapter 31, "Publishing and Printing"
- Chapter 32, "Enabling Quoting Security"
- Chapter 33, "Placing Orders"

Using Folder Functionality

This section contains information on using folder functionality in the Forms UI.

19.1 Using Folder Functionality to Customize Forms

You can customize some forms in the Forms UI. Once you make changes to an existing folder, you can save the changes to a new folder or the same folder. Forms Quoting uses Oracle Applications Folder technology to allow users to customize the following forms:

- Quote Customer Search
- Quote Search
- Quote Header
- Quote Lines
- Sales Team

You can change fields in the following ways:

- Hide/Show
- Move fields
- Change field size
- Rename Prompt

Prerequisites

None

Steps

1. Place your cursor in a field on the form you want customize and right click, or select an action from the **Folder** menu.
2. For information on hiding or showing a field, changing a prompt, changing the length of a field, moving a field, or saving a folder configuration, see the *Oracle Application User's Guide, Folders*.

19.1.1 Fields That Cannot be Hidden

There are specific fields in the Forms UI that users cannot hide.

Note: Users should not hide mandatory fields.

The following table lists fields that cannot be hidden in each form.

Table 19–1 Fields That Cannot be Hidden

| Form | Field |
|----------------------------------|---------------------------------|
| Quote Search | Quote Number |
| Customer Search > Organization | Customer |
| Customer Search > Person | Last Name |
| Quote Header > Summary | Order Type |
| Quote Header > Summary | Currency |
| Quote Header > Summary | Salesperson |
| Quote Header > Addresses | Quote To Address Details |
| Quote Header > Addresses | Bill To Address Details |
| Quote Header > Addresses | Ship To Address Details |
| Quote Header > Addresses | Default From Quote To (Bill To) |
| Quote Header > Addresses | Default From Quote To (Ship To) |
| Quote Header > Addresses | Bill To Customer |
| Quote Header > Payment, Shipping | Payment Terms |
| Quote Header > Payment, Shipping | Payment Type |
| Quote Header > Tax | Tax Handling |

Table 19–1 Fields That Cannot be Hidden

| Form | Field |
|------------------------|----------------|
| Quote Header > Tax | Tax Code |
| Quote Header > Tax | Amount |
| Quote Lines > Pricing | Line |
| Quote Lines > Pricing | Model Status |
| Quote Lines > Pricing | Product |
| Quote Lines > Pricing | Qty |
| Quote Lines > Pricing | UOM |
| Quote Lines > Bill To | Customer |
| Quote Lines > Ship To | Customer |
| Quote Lines > Shipping | Requested Date |
| Quote Lines > Service | Reference Type |
| Sales Team | Full Access |
| Sales Team | Name |

20

Creating Quotes

This section explains the procedures necessary to create a quote in Oracle Quoting.

- [Overview of Creating Quotes](#)
- [Creating a Quote](#)
- [Creating a Quote From an Opportunity](#)

20.1 Overview of Creating Quotes

A quote can be created as a new quote, as a copy of an existing quote, or from an opportunity. If created from an opportunity, the opportunity name is displayed in the Quote Name field.

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

When you create a quote, you must initially specify:

- Customer
- Customer account, if the customer has an active account
- Primary salesperson
- Expiration date
- Order type
- Currency
- Quote number, if **ASO: Automatic Numbering** is set to **No**
- Contract template, if **ASO: Enable Use Contracts** is set to **Yes**.

A record for the new quote is created when you enter the mandatory fields and save the quote. Oracle Quoting then generates the quote number, version number, creation date, and status. The quote number is unique across all quotes for all customer IDs and account numbers. For a new quote, the version number is always 1 and by default the status is draft. If no Quote Name is specified when creating a quote, the Quote Name defaults to **Quote for <Quote To Customer>**.

Quote number, customer, customer account (if specified), and currency cannot be changed after the quote is saved.

The searchable list of customers comes from the customer repository in the Trade Community Architecture (TCA). You can create new customers if the profile **ASO: Create New Customer** is set to **Yes** at the appropriate level. You can create account customers from the AR Customers form. You can create prospect customers from Oracle Sales Online, Oracle TeleSales, or Oracle Quoting - HTML.

20.1.1 Understanding Quotes

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

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

Note: In the Forms UI, the profile option **ASO: Automatic Numbering** determines if the system automatically generates a quote number. For more information, see the *Oracle Quoting Implementation Guide*.

In the Forms UI, your administrator can specify that when a quote is in the draft stage, any changes you make simply overwrite your previous entries. If the quote is in a status is auto-version enabled, each time the user selects the Save icon in the toolbar, the application creates a new version.

These restrictions and permissions can be fully determined by your organizational policies and implemented by your System Administrator. See [Section 20.1.2, "Quote Status"](#) for more details.

Oracle Quoting keeps a list of all of the quote versions you have created. You can view general information about all previous quotes for the customer. You can also view the history of the current quote. In the Oracle Quoting main form, you can modify only the latest version of a quote. Previous versions of a quote are *read-only*: you can neither modify the quote from the user interface nor change the quote status. However, in the Forms UI you can use the Copy Quote functionality to create a new quote version from a previous quote version if all the following conditions are met:

- The highest quote version is not in the Contract Canceled or Order Submitted status
- The highest quote version has no contract attached to it
- The highest quote version is not in *Approval Pending* status
- The quote is not submitted for batch pricing

You cannot delete quotes once you create them. You can inactivate quotes or set quotes to expire automatically after a certain period of time.

20.1.2 Quote Status

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

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. See the *Oracle Quoting Implementation Guide* for more information.

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

- Decide for each status if a new version of the quote is created or if the quote is overwritten when you select the Save icon in the toolbar
- Decide which statuses allow modification of the quote and which are read-only
- Add statuses
- Change status names
- Define, by application, a default quote status on a new quote or version
- Decide the statuses to which a given status can change

20.1.2.1 Pre-Defined Quote Statuses

The following table shows the available seeded quote statuses.

| Quote Status | Description | Read-only |
|-------------------|---|-----------|
| Approval Canceled | Sales representative canceled the approval process. | No |
| Approval Pending | Quote is pending approval. | Yes |
| Approval Rejected | Approval was rejected by the approvers. | No |
| Approved | Approved by the approvers. | Yes |
| Contract Canceled | Contract canceled by the contract administrator. | Yes |

| Quote Status | Description | Read-only |
|-------------------|---|-----------|
| Contract Pending | Contract is review with the contract specialist. | Yes |
| Contract Required | Contract specialist to author and approve contract required after approval process. | Yes |
| Draft | Initial status. | No |
| Inactive | No more activity allowed. | Yes |
| Order Submitted | Order submitted to Oracle Order Management. | Yes |
| StoreDraft | For iStore internal use only. | No |

The statuses in the following table exist for backward compatibility (for previous version of Oracle Quoting), but there is no functionality behind 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 |
| Problem | Could be used to show there is a problem with the quote being submitted 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 |

Note: 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 will you have the ability to enable them.

If a quote status is *read only* you only update the following attributes:

- Modify notes.
- Change the quote status, as long as the transition is valid. Thus, you can potentially place an order, initiate approval, request contract creation or change, etc.

- Publish or unpublish a quote, if publishing is enabled and the quote satisfies publishing criteria.
- Modify payment information, until the order is submitted.
- Add attachments. You cannot remove, or replace existing attachments.

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. Yet, even if the profile is set to **Yes**, the user must have update access to the quote to be able to modify it.

If you want to update a quote in read-only status:

- Transition to an updateable status.
- Create a new quote version.
- Use **Copy Quote** to create a brand new quote.

20.1.2.2 Rules for Quote Status Changes

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

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

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

Table 20–1 Seeded Quote Status Transitions

| From | To | User Maintainable |
|------------------|--------------------|--------------------------|
| Approval Pending | Approved | No |
| Approval Pending | Approval Canceled | No |
| Approval Pending | Approval Rejected | No |
| Approval Pending | Contract Required | No |
| Contract Pending | Contract Approved | No |
| Contract Pending | Contract Cancelled | No |

Table 20–1 Seeded Quote Status Transitions

| From | To | User Maintainable |
|-------------|------------------|--------------------------|
| StoreDraft | Draft | No |
| StoreDraft | Inactive | No |
| StoreDraft | Order Submitted | No |
| StoreDraft | Contract Pending | No |

20.2 Creating a Quote

A quote lists the products your customer is interested in purchasing before you place an order.

The behavior of the Customer and Account LOVs in the header depends upon the **ASO: Auto Account Creation** profile option setting. See [Section 24.1.1, "Customer Data"](#) for more information.

Note: The maximum number of results in the LOVs for the Quote To, Ship To, and Bill To customers and accounts at the header and line level is limited by the profile option **ASO: Max Number of Results**.

You must enter the following information to create a quote:

- Customer
- Customer Account (if the customer has an active account)
- Primary Salesperson
- Expiration Date
- Order Type
- Currency
- Quote Number (if **ASO: Automatic Numbering** is set to **No**)
- Contract Template (if **ASO: Enable User Contracts** is set to **Yes**)

To create a quote:

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Quoting Sales Agent responsibility.
2. Choose **Quoting** from the Navigator.
3. Enter the customer information for the quote:
 - a. Optionally, enter a quote name.

- b. Use the Customer LOV to select the customer name or use the Customer search. See [Section 21.3, "Searching for Customers"](#).
 - c. Use the Account LOV to select an active account number for the customer. This field automatically populates when you select the customer.

If the customer does not have an account number, one is created based on the setting of the profile option **ASO: Auto Account Creation**. See [Chapter 24, "Customers and Relationships"](#) for more information.

If the customer is not specified, the user can use the Account LOV to select the Quote To customer and account. The Quote to customer will be copied to the Customer field.
 - d. Optionally, use the Contact LOV to select a contact for the customer.
 - e. Optionally, enter a different expiration date.
 - f. Optionally, use the Order Type LOV to select a different order type.

This field is automatically populated with the value from the profile option **ASO: Default Order Type**.
 - g. Use the Salesperson LOV to select a primary sales agent for the quote.

This field is automatically populated with the current user if the user is set up as a valid salesperson. If not, the field defaults to the sales representative designated in **ASO: Default Salesrep**.
 - h. Optionally, use the Contract Template LOV to select a different contract template.

This field is automatically populated based on the setting of the profile option **ASO: Contract Template for Standard Terms and Conditions**.
4. Add products to the quote:

For information on adding products to a quote, see [Section 26.2, "Adding Products to the Quote"](#).
 5. Select the **save icon**.

The application saves the quote and generates a quote number that is displayed in the Quote Number field. The Quote Name will be populated with *Quote for <Customer>* if it is not specified.

20.2.1 Selecting an Existing Customer in the Oracle Quoting Form

To find and select a quote-to customer in the header of the Oracle Quoting form:

Note: The maximum number of results in the LOVs for the Quote To, Ship To, and Bill To customers and accounts at the header and line level is limited by the profile option **ASO: Max Number of Results**.

Prerequisites

The customer must exist in the database as a party of type **Person** or **Organization**.

Steps

1. Navigate to the Oracle Quoting form.
2. Use the Customer LOV to select the customer's name, or enter some portion of the customer name and the wildcard (%).

The behavior of the Customer LOV is controlled by the profile option **ASO: View Customers Without Accounts**. If set to **Yes**, the LOV displays all active parties of types **Person** and **Organization**. If set to **No**, the LOV displays active parties of type **Person** and **Organization** that have active accounts. The account number is copied to the Account field when the customer is selected and an account exists for the customer. For more information, see the *Oracle Quoting Implementation Guide*.

3. Optionally, use the Account LOV to select a different account number.

Oracle Quoting automatically populates the Account field when you select the Customer. The LOV displays all active accounts for the selected customer.

- If no account exists, one may be created for the customer based on the setting of the profile option **ASO: Auto Account Creation**. See [Section 24.1.2, "Creation of Accounts"](#) for more information.
- If no customer was selected, the LOV displays all accounts and their related parties.

4. Optionally, use the Contact LOV to select a contact for the customer.

The LOV displays all parties of type **Person** that have a party relationship with the customer.

You can also select a customer by entering the account number in the Account field. Oracle Quoting then populates the Customer field.

20.3 Creating a Quote From an Opportunity

To create a quote from an opportunity:

Prerequisites

- You must be logged onto Oracle TeleSales to perform this procedure.
- Use an existing opportunity or create a new one. See the *Oracle TeleSales User Guide* for detailed instructions on creating and accessing opportunities.

Steps

1. Navigate to **Opportunity Center** or to **eBusiness Center > Opportunity**.
2. Select the opportunity you wish to use.
3. Select **Create Quote**. The Create Quote From Opportunity form opens.
4. The following fields, when available, are defaulted and cannot be changed:
 - Customer Name
 - Quote Number (if **ASO: Automatic Numbering** is set to **No**)
 - Opportunity Name

5. Optionally, select an Account Number for the customer.

The LOV displays all account numbers for the customer. If there is only one account number, it defaults into this field.

6. Optionally:
 - Select a different Contact.
 - Select a different Address.
 - Enter a different Quote Name.
 - Select a different Order Type.
 - Select an Agreement.
 - Select a different Currency.
 - Select a different Price List.
 - Select a different Contract Template.
 - Select a different Salesperson.
 - Select a Sales Group.

- Select a Sales Channel.
 - Select a Source Name.
7. Select **Create Quote**.
- The new quote displays in the main Quoting form.

This section contains information on performing searches in Oracle Quoting.

- [Searching Using the Query Method](#)
- [Searching for Quotes](#)
- [Searching for Customers](#)
- [Using interMedia Search](#)

21.1 Searching Using the Query Method

The query method allows you to search for quotes using the following criteria:

- Quote Name
- Quote Number
- Quote Status
- Customer (quote-to)
- Account (Quote-To Customer)
- Contact (Quote-To Customer)

The query method allows you to search for lines (in the Lines tab) using the following criteria:

- Model Status
Specify an asterisk as the search criteria if you want to search for incomplete configuration.

- Product
- Qty
- UOM
- Price List (Pricing Region)
- Line Category (Pricing Region > Details)
- Line Type (Pricing Region > Details)
- Configurable (Pricing Region > Details > Attributes)
- Shippable (Pricing Region > Details > Attributes)
- Support Service (Pricing Region > Details > Attributes)
- Serviceable (Pricing Region > Details > Attributes)
- Returnable (Pricing Region > Details > Attributes)
- Reference Type (Service region)

Specify **UNSPECIFIED** as the search criteria to search for service items that do not have a serviceable item reference.

To search using the query method:

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

Prerequisites

If searching in the Lines tab, a quote must be displayed in the Quoting form.

Steps

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

21.2 Searching for Quotes

You can search for quotes using the following criteria:

- Customer Name
- Account Number
- Contact Name
- Quote Name
- Quote Number
- Quote Status
- Product
- Expiration Date (From)
- Expiration Date (To)
- PO Number

- Opportunity Name
- Opportunity Number
- Phone Number
- Quote Version

Note: If searching by quote version, you must also enter a quote number.

- Currency
- Price List
- Order Type
- Agreement
- Quote Amount (From)
- Quote Amount (To)
- Creation Date (From)
- Creation Date (To)
- Update Date (From)
- Update Date (To)
- Web Published
- Primary Salesperson
- Primary Sales Group
- Salesperson
- Sales Group
- Sales Channel
- Source Name

Once the search results display, you can view the quotes. The number of results displayed depends on the profile option **ASO: Max Number of Results**. For more information, see the *Oracle Quoting Implementation Guide*.

You can also hide infrequently used criteria or rearrange the search criteria fields so that key criteria appear at the top of the criteria section. After making changes, you can save the new search criteria arrangement and use it for subsequent searches.

Note: The Quote Number field cannot be hidden.

21.2.1 Basic Search

To search for quotes:

Prerequisites

None

Steps

1. Access the Quote Search form in one of the following ways:
 - Select **Quote Search** from the Navigator
 - Select **View > Find**.
 - Select the flashlight icon
2. Select the Basic tab.
3. Select **Quote** from the Find drop-down menu.
4. Enter search criteria in the appropriate fields. You must enter a value in at least one field.

Note: You cannot specify leading wildcard characters ('%', '_') in the search criteria.

5. Select **Search**. The results display in the Results section.
6. Optionally, view a quote by highlighting it and selecting **View**.

Note: The maximum number of results in the LOVs for the customer and account in the Basic Search form is limited by the profile option **ASO: Max Number of Results**.

21.2.2 Advanced Search

To search for quote:

Prerequisites

None

Steps

1. Access the Quote Search form in one of the following ways:
 - Select **Quote Search** from the Navigator
 - Select **View > Find**.
 - Select the flashlight icon
2. Select the Advanced tab.
3. Select **Quote** from the Find drop-down menu.
4. Select a value from the Item LOV.
5. Select a condition.
6. Enter a value in the Value field.

Note: You cannot specify leading wildcard characters ('%', '_') in the search criteria.

7. Select **Search**. The results display in the Results section.

21.3 Searching for Customers

You can perform a fuzzy search, widening the scope of a search and presenting data comparable to the search criteria. The fuzzy search method uses Word Replacement Rules to map a word, abbreviation, or special character to a similar word, abbreviation, or special character.

You can search for customers of party type **Organization** using the following criteria:

- Customer Name
- Account Number
- Taxpayer ID
- Tax Registration Number
- Contact Last Name
- Contact First Name
- Contact Phone
- Original Reference

Note: You can only perform a fuzzy search for an Organization if you enter either Customer Name or Contact First Name and Contact Last Name.

You can search for customers of party type **Person** using the following criteria:

- First Name
- Last Name
- Account Number
- Phone Number
- Taxpayer ID
- Tax Registration Number
- Original Reference

Note: You can only perform a fuzzy search for a Person if you enter either First Name and Last Name.

Once the search results display, you can view the quotes. The number of results displayed depends on the profile option **ASO: Max Number of Results**. For more information, see the *Oracle Quoting Implementation Guide*.

You can also rearrange the search criteria fields so that key criteria appear at the top of the results section or hide infrequently used criteria. Once you make changes, you can save the new search criteria arrangement and use it for subsequent searches. See [Chapter 19, "Using Folder Functionality"](#) for more information.

21.3.1 Searching for an Organization

To search for an organization:

Prerequisites

None

Steps

1. Access the Customer Search form in one of the following ways:
 - Select **Customer Search** from the Navigator
 - Select **View > Find**.
 - Select the flashlight icon
2. Select **Organization** from the Find drop-down menu.
3. Enter search criteria in the appropriate fields. You must enter a value in at least one field.
4. Select **Exact Search** to execute an exact search.
Select **Fuzzy Search** to execute a fuzzy search.
The search results display.
5. Optionally, highlight a customer in the search results and select **Apply to Quote** to use this customer (as the Quote-To Customer) in the current quote.

21.3.2 Searching for a Person

To search for a person:

Prerequisites

None

Steps

1. Access the Customer Search form in one of the following ways:
 - Select **Customer Search** from the Navigator
 - Select **View > Find**.
 - Select the flashlight icon
2. Select **Person** from the Find drop-down menu.
3. Enter search criteria in the appropriate fields. You must enter a value in at least one field.
4. Select **Exact Search** to execute an exact search.
Select **Fuzzy Search** to execute a fuzzy search.
The search results display.
5. Optionally, highlight a customer in the search results and select **Apply to Quote** to use this customer (as the Quote-To Customer) in the current quote.

21.4 Using interMedia Search

You can search for products using the interMedia search if the profile option **ASO: Enable interMedia Search** is set to **Yes**. interMedia search allows you to search on the Product field in the Lines tab, using any of the following criteria:

- Part Number
- Description
- Long Description

If interMedia search is not enabled, you can only search by Part Number and Description in the Product LOV.

Credit Checks

This section contains information about performing credit checks.

- [Overview of Credit Checks](#)
- [Performing a Credit Check](#)

22.1 Overview of Credit Checks

Credit checking in Oracle Quoting allows the user to determine the credit worthiness of a customer while working on a quote. The user can decide if the quote should be submitted for business approvals credit verification. The profile option **ASO: Enable Credit Check** determines if credit checks can be performed. See the *Oracle Quoting Implementation Guide* for more information.

There are two types of credit checks available in Oracle Quoting:

Internal — Internal credit checking is based on transaction data in the quote, and historic transaction data in Oracle Order Management and Oracle Receivables. It pertains to quote header level billing information. Internal credit checks are performed by the public credit check API OE_EXTERNAL_CREDIT_PUB.

The key differences between internal credit checking and the credit checking functionality in Oracle Order Management are:

- Item category limits are not checked in the public credit check API provided for internal credit checks.
- Credit checking is only available at the header level in internal credit checking, while OM credit checking supports both header and line level credit checks.
- There is no Holds functionality for Internal credit check

External — External credit checks are configurable by the application developer and allow users to make calls to non-Oracle applications. Please see the *Oracle Quoting Implementation Guide* for more information.

Based on setup, internal and/or external credit checks may be performed. The internal credit check is performed if **ASO: Credit Check Rule** is set at the appropriate level. The external credit check is performed if it is configured by the application developer.

22.2 Performing a Credit Check

To perform a credit check:

Prerequisites

- **ASO: Enable Credit Check** must be set to **Yes** at the appropriate level.
- The quote status must not be **Order Submitted**

- The quote must not be expired.
- The highest version of the quote must be used.
- The quote must not be submitted for batch pricing.
- There must be a designated Billing customer on the quote.
- The billing customer must have an account.
- There must be a billing address designated on the quote.
- Pricing and Tax Statuses must both be complete.

Steps

1. Select **Actions > Initiate Credit Check** and select **OK**.
2. A pop-up window displays the results of the credit check.

Note: The results of the credit check are not saved in the quote.

Pricing Products and Quotes

This section provides information and instructions on pricing products or entire quotes.

- [Overview of Pricing](#)
- [Executing Manual Pricing and Tax Requests for a Quote](#)
- [Pricing a Product](#)
- [Applying Custom Pricing Attributes](#)
- [Overriding Price Break Level Adjustments](#)
- [Pricing Configurable Products](#)
- [Applying Promotion Codes](#)
- [Adjusting the Price of a Product in the Quoting Form](#)
- [Applying a Non-Automatic Discount to a Product or the Entire Quote](#)
- [Manually Adjusting Prices in the Price Adjustments Form](#)
- [Freezing Prices for a Quote](#)

23.1 Overview of Pricing

The price your customer pays for a product depends on the price lists, manual adjustments, and promotional discounts you enter.

23.1.1 Price Lists

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

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

The header price list defaults based on the following information on the quote (in the following order):

- Agreement
- Quote-to Customer
- Order Type

23.1.2 Custom Pricing Attributes

Custom Pricing Attributes allow you to price a product based upon multiple factors, allowing for greatly increased product and price flexibility. For example, the price of a one year service agreement may depend upon many factors, such as response time, support hours, and coverage. With Custom Pricing Attributes, you can set up one product with a formula that determines the price based on the selected attributes. Custom pricing attributes can be set up in the Oracle Pricing UI.

23.1.3 Discounts

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

Example

A customer purchases a \$200.00 coat and a \$100.00 shirt. There is a 10% discount available for the shirt and a 50% discount available for the entire order. The quote price is calculated as follows:

- The coat: $\$200 - 50\% = \100.00
- The shirt: $\$100 - 60\% = \40.00
- Total price = \$140

23.1.4 Pricing Adjustments

Quoting is set up to display automatic adjustments (which are calculated in Oracle Advanced Pricing) applicable to the selected product and customer. You can also manually apply non-automatic adjustments.

If **ASO: Calculate Price** is set to **Automatic**, each time you change a product in a quote, the whole quote is repriced automatically. A change in one product can affect the level of other offers and discounts.

Pricing Date

Oracle Pricing uses the Pricing Date to interpret the effective dates set up in Pricing. Pricing Date is useful if you want to ensure that the prices on a quote do not change if product prices are updated in Oracle Pricing. You may also want to initially quote prices based on historical pricing information or future pricing information.

23.1.5 Manual Adjustments

There are two ways to manually adjust prices in Oracle Quoting. You can either manually override the price of a product in the main Quoting form or change the manual override adjustment value, for a product or the whole quote, in the Price Adjustment form.

You can manually adjust prices at the line level in Oracle Quoting, if **ASO: Discounting Privilege** is set to **Full**. If set to **Full**, you can modify the Unit Net Price field to reflect an adjustment or override the value of a non-automatic discount in the Price Adjustments form.

23.1.6 Terms Substitution

When a quote is priced using Advanced Pricing, the pricing engine checks if there are terms substitutions available at either the header or line level. The following terms substitution types are supported by Oracle Advanced Pricing:

- Payment Terms Substitution
- Freight Terms Substitution
- Shipping Method Substitution

Depending on the defined modifiers , any of the available values can be substituted after the pricing engine call.

For more information on modifiers and terms substitution, see the *Oracle Advanced Pricing User's Guide* and the *Oracle Advanced Pricing Implementation Manual*.

23.2 Executing Manual Pricing and Tax Requests for a Quote

Out of the box, Oracle Quoting automatically prices and calculates tax for a quote whenever a change is made to the quote that affects pricing. A quote change that affects the pricing will also affect tax values. Tax is computed after the pricing call, since it is dependant on product pricing. The following quote changes do not affect quote pricing:

- Sales credits changes
- Attachments changes
- Notes changes
- Initiate/Cancel Approvals
- Request Contract Creation or Assistance

- Sales Team changes
- Web Publish or Unpublish
- Initiate Credit Check
- System driven quote status changes
- Place Order

If the profile option **ASO: Calculate Price** is set to **Manual**, you can choose when to calculate prices and tax for the quote. 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. See the *Oracle Quoting Implementation Guide* for more information.

Note: Setting **ASO: Calculate Price** to **Manual** and **ASO: Calculate Tax** to **Automatic** is not supported because quote tax is based on the quote product pricing.

A user can still manually price a quote by selecting **Price Quote**, even if the profiles **ASO: Calculate Price** and **ASO: Calculate Tax** are set to **Automatic**. Manual pricing and tax calculations allow the user to capture the most recent price/tax information.

If the Pricing Date is set, Oracle Quoting will price the quote as of the date specified in the Pricing Date field. The date can be any time in the past or future. If this field is blank, quotes are priced as of the current date and time.

The option to manually price a quote is particularly helpful to users who are:

- Entering a number of quotes lines
- Entering a number of quote lines in a Configurator session
- Making a number of quote line changes
- Entering a number of quote lines in a quote template or across multiple templates
- Entering line with complex tax or pricing setups

Repricing after each change or addition increases processing time. Therefore, the ability to price the quote manually is more efficient.

If the pricing or tax statuses are incomplete, users will not be allowed to:

- Submit a quote for approval

- Approve a quote
- Request Contract Creation
- Web publish a quote
- Initiate a credit check
- Print a quote
- Place an order

To manually price a quote:

Prerequisites

- The highest version of the quote must be used.
- The quote is not in a read-only status.
- The user has Update access to the quote.
- The quote has not been submitted to batch pricing.

Steps

1. Select **Price Quote**.

If **ASO: Calculate Price** is **Automatic** AND **ASO: Calculate Tax** is **Automatic** AND **ASO: Enable Batch Processing** is **No**, the Price Quote form will not be shown but the quote will be priced. For any other combination of these three profiles, the Price Quote page is displayed.

2. Choose to compute price only, tax only, or both.
3. Choose when you want to price the quote.

If you have **ASO: Enable Batch Processing** set to **Yes**, you will have two options for pricing the quote: **Now** or **Submit pricing request and notify me when it is complete**. If **ASO: Enable Batch Processing** is set to **No**, these options are not available and the application defaults to **Now**. See the *Oracle Quoting Implementation Guide* for more information.

4. Select **Submit**.

If you chose **Submit pricing request and notify me when it is complete**, a pop-up window confirms that the pricing request has started and gives you a concurrent request number that you can use to search for pending requests. Once the pricing request is complete, a notification is sent to the user who initiated the pricing and tax request.

The quote is not updateable (except for notes and attachments) until the pricing request is complete or canceled. The Summary Region of the Quote Header tab displays the Pricing and Quote Statuses, and the Pricing Request number, if you selected `Submit pricing request and notify me when it is complete` in the Submissions Options field on the Price Quote page.

23.2.1 Viewing Details of the Pricing Request

You can view the pricing request details if **ASO: Enable Batch Processing** is set to **Yes**.

To view pricing request details:

Prerequisites

- **ASO: Enable Batch Processing** must be set to **Yes**.
- The highest version of the quote must be used.
- The quote is not in a read-only status.
- The quote has been submitted for batch pricing.

Note: After the batch pricing request completes the user will receive an email notification.

Steps

1. Select **Actions > Pricing Request Details** and select **OK**.
2. The Pricing Request Details form displays:
 - Pricing Request ID
 - Date Submitted
 - Request Name
 - Phase
 - Requestor
 - Date Started
 - Status

23.2.2 Canceling a Pricing Request

To cancel a pricing request:

Prerequisites

- **ASO: Enable Batch Processing** must be set to **Yes**.
- The highest version of the quote must be used.
- The quote is not in a read-only status.
- The quote has been submitted for batch pricing.

Note: When a quote is submitted for batch pricing, the phase may be one of the following: Pending, Inactive or Running.

Steps

1. Navigate to the Pricing Request Details form.
2. Select **Cancel Pricing Request**.

The Pricing Request status changes to Canceled.

OR

1. Select **Actions > Cancel Pricing Request** and select **OK**.

23.3 Pricing a Product

To price a product in the Lines tab:

Prerequisites

None

Steps

1. To apply a price list only to the product displayed in the Pricing section of the Lines tab:
 - a. Enter the product number or use the LOV to search for a product.
 - b. Enter the quantity in the Qty field.
 - c. Enter the UOM.
 - d. Use the LOV to enter a price list.
 - e. If the Bill of Materials (BOM) item type is **Model**, then you must view its price following the procedure outlined in [Section 23.6, "Pricing Configurable Products"](#).
 - f. If the product is a Service, navigate to the Service section and use the Period and Duration LOVs to enter the period and duration of the service, and enter a start date.

The product pricing appears when you tab out of the Price List field. The Unit List Price shows the list price of this product from the price list displayed in the Price List field. The Unit Adjustment field shows all adjustments on the line. The Unit % Adj shows the percentage of the adjustments on the line. The Unit Selling Price shows the selling price per unit. The Total Price shows the total price for a product.

You are now ready to:

- Add another product to the quote
- Adjust prices
- Enter payment information

23.4 Applying Custom Pricing Attributes

To apply custom pricing attributes:

Prerequisites

Pricing attributes must be set up in Oracle Advanced Pricing.

Steps

1. To apply custom pricing attributes at the header level, place the cursor in the header of the Quoting form or the Quote Header tab.

To apply custom pricing attributes at the line level, place the cursor on a line in the Lines tab.

2. Select **Actions > Promotions/Pricing Attributes**.
3. Use the LOV to select a Pricing Context. The Level field is populated automatically based on the selected Pricing Context.
4. Select **Apply**.

If **ASO: Calculate Price** is set to **Automatic**, Quoting automatically reprices the product price(s) based on the pricing attributes.

23.5 Overriding Price Break Level Adjustments

For more information on price break adjustments, see the *Oracle Advanced Pricing User's Guide*.

To override a price break level adjustment:

Prerequisites

- In Oracle Pricing, the Override Flag for the price break adjustment must be enabled.
- **ASO: Discounting Privilege** must be set to **Full**.
- The user must have Update access.
- The highest version of the quote must be used.
- The quote must not be in a read-only status.
- The quote must not be submitted for batch pricing.

Steps

1. Select **Actions > Price Adjustments > OK**.
2. Highlight the price break adjustment on the Line Level Adjustments form.
3. Select **Details**.

The Details button is enabled only if the adjustment is a price break adjustment. The Price Adjustments Details form displays the price break level records set up for the price break adjustment.
4. To change the value of the adjustment, enter a new number in the Value field.
5. Select a reason code from the Reason Code LOV.
6. Enter a reason for the change in the Reason Text field.
7. Select **OK**.

You are taken back to the Price Adjustments form.
8. Select **Apply**.

23.6 Pricing Configurable Products

You must configure model products before pricing because their price depends on the options your customer chooses.

To price configurable products:

Prerequisites

The Lines tab must display a model product. Use the **Product Details** button, located in the Details section, to verify that the product is a configurable product, or expose the Configurable field in the Pricing region of the Quote Lines tab.

Steps

1. The Lines tab displays the model product. This is usually the most basic configuration.
2. Configure the product. See [Section 26.7, "Configuring a Product"](#) for instructions.

List prices for each component are visible in the Configurator form.
3. Select the model line or any of its components to view the total price of the product and its options.

The total price for the configured model appears in the Line Total field in the Details section.

4. If your customer decides not to purchase the product after configuration, you must remove the product. The components are removed automatically when you remove the product. See [Section 26.3, "Removing Products from the Quote"](#) for instructions.

23.7 Applying Promotion Codes

You can modify the price of a whole quote or a single line by applying **Promotions** to the quote. You will see all available promotions that are set up in Pricing, even those that are not applicable to your quote. When you select the promotion, the quote price is adjusted.

To apply promotion codes to a line or to the entire quote:

Prerequisites

The quote to which you want to apply a promotion must be displayed in the Quoting form.

Steps

1. Select **Actions > Promotions/Pricing Attributes > OK**.

The Promotions/Pricing Attributes form opens.

2. Select the promotion from the Promotion No LOV.

3. Optionally, choose the list line for the promotion and select **Apply**.

The prices in the quote are repriced based on the promotion amount.

23.8 Adjusting the Price of a Product in the Quoting Form

In order to adjust the price of a product in the Quoting form, there must be a modifier set up in Pricing where the Override flag is checked and the adjustment amount/percent is zero. Changing the unit selling price on the Oracle Quoting form overrides the adjustment amount of the modifier value (zero) and changes it to the indicated amount.

There are two types of manual adjustments:

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

Note: The manual adjustment cannot make either the product total price. The unit list price can be a negative value.

Repricing Rules

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

Table 23–1 Repricing Example

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

Manual adjustments include, for example discounts or surcharges. To apply manual adjustments to a line.

Prerequisites

- The product intended for price adjustment must be added to the quote and displayed in the Quote Lines tab.

- Manual adjustments are possible if the **ASO: Discounting Privilege** profile option is set to **Full**. If it is set to **Partial** or **None** the Unit Selling Price field is read only.

Steps

1. Use your cursor to highlight the price listed in the Unit Selling Price field.
2. Enter the price for the product. It can be a negative value.
3. **Save** the quote.

Oracle Quoting automatically calculates the adjustment amount based on the list price of the product and enters it into the Unit Adjustment field. You can also view the adjustment in the Price Adjustments form.

23.9 Applying a Non-Automatic Discount to a Product or the Entire Quote

To apply a non-automatic discount to a product or to the entire quote:

Prerequisites

A non-automatic discount must be set up in Oracle Pricing.

Steps

1. To apply a non-automatic discount at the header level, place the cursor in the header of the Oracle Quoting form.
To apply a non-automatic discount at the line level, place the cursor in the Lines tab.
2. Select **Actions**.
3. Select **Price Adjustments** and select **Go**.
The Price Adjustments form opens.
4. Use the LOV to select the Modifier Name of the adjustment you want to apply.
The subsequent fields for this adjustment populate automatically.
To adjust the amount of the price adjustment, see [Section 23.10, "Manually Adjusting Prices in the Price Adjustments Form"](#).

23.10 Manually Adjusting Prices in the Price Adjustments Form

You can change a manual override adjustment value from the Price Adjustments form if, when the adjustment was created in Pricing, the Override Allowed flag was set to **Yes**. You can only override adjustments in the Price Adjustments form if the profile **ASO: Discounting Privilege** is set to **Full**. If the profile is set to **Partial**, you can still apply non-automatic discounts.

You can apply manual adjustments in the Price Adjustments form either at the header or line level.

To manually override the adjustment amount of a non-automatic discount either at the header or line level:

Prerequisites

None.

Steps

1. Select **Price Adjustments** from the Actions menu.

The Price Adjustments form opens.

2. Select a non-automatic adjustment as described in [Section 23.9, "Applying a Non-Automatic Discount to a Product or the Entire Quote"](#).

You can also manually override price break adjustments. See [Section 23.5, "Overriding Price Break Level Adjustments"](#) for more information.

3. In the Value field for the non-automatic discount you wish to override, type in the new discount amount.

Note: The Value field can be updated only if the profile **ASO: Discounting Privilege** is set to **Full** and the **Override Allowed** flag is enabled.

4. Enter a Reason Code.
5. Optionally, enter Reason Text.
6. Select **Apply**.
7. Optionally, reset the adjustments to their original values, select **Reset**.

23.11 Freezing Prices for a Quote

Oracle Pricing uses the Pricing Date to interpret the effective dates for prices. If the Pricing Date is set to January 1, 2002, only prices, discounts and adjustments that are **valid** as of January 1, 2002 are calculated.

Note: Pricing Date is not limited to the current date, but can be any date in the past or future.

Pricing Date ensures that the prices on a quote do not change if product prices are updated in Pricing. You can quote prices based on historical or future pricing information.

By selecting the Freeze Price option in the Actions menu, you can save the current date and reuse it for future pricing calls. This date subsequently appears on the quote as the Pricing Date. You can change the Pricing Date to any date.

If no date is selected, Oracle Quoting uses the current date to get the most current prices.

Prerequisites

- The highest version of the quote must be used.
- The quote is not in a read-only status.

Steps

1. Choose **Actions > Freeze Prices > OK**.

In the Summary section of the Quote Header tab, the Pricing Date field shows the current date. This date is used for all subsequent pricing calculations.

2. Optionally, you can unfreeze prices, by choosing **Actions > Unfreeze Prices > OK**.

In the Summary section of the Quote Header tab, the Pricing Date field is cleared. The current date is used for all subsequent pricing calculations.

Customers and Relationships

This chapter contains information about customer types, customer data, and customer relationships.

- [Overview of Customers and Relationships](#)
- [Creating a Customer](#)

24.1 Overview of Customers and Relationships

There are two customer types in Oracle Quoting:

- Person
- Organization

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

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

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

24.1.1 Customer Data

To create quotes and orders, certain standard customer information is necessary. The bill-to and ship-to information, which is optional when creating the quote, is mandatory when converting the quote into an order.

Note: The customer, referred to in Quoting as the Quote-to customer, is the party for whom the quote is being created. This party becomes the sold-to customer when the quote is converted into an order in Oracle Order Management.

The following table shows the mapping of Oracle Quoting terminology to the Oracle Receivables (AR) Trading Community Architecture (TCA) terminology.

| Location in UI | Quoting Terminology | AR Terminology (TCA) |
|---|---|--|
| Quote Header tab | Quote-to Customer, Quote-to Contact, Quote-to Address Note: The quote-to address is not passed into OM. | Sold-to Customer, Sold-to Contact |
| Addresses Section of the Quote Header tab | Ship-to Customer, Ship-to Contact, Ship-to Address | Ship-to Customer, Ship-to Contact, Ship-to Address |
| Addresses Section of the Quote Header tab | Bill-to Customer, Bill-to Contact, Bill-to Address | Bill-to Customer, Bill-to Contact, Bill-to Address |

This customer data can be grouped into the following areas:

Quote-To Information:

- **Quote-To Customer** — The name and financial account of the customer. Sometimes only the name of the customer is known, as there may not be a financial account set up for them yet. The quote-to customer is financially responsible for the order; for example, credit and collections contact the quote-to customer if payment is not received.
- **Quote-To Contact** — A person representing the quote-to customer, only when the quote-to customer is of party type **Organization**. You cannot enter a contact if the Quote-To Customer is of type **Person**. Optional field.
- **Quote-To Address** — Address for the quote-to customer or quote-to contact. This address is used for mailing purposes. The Quote-to address is an optional address. It may be passed to the quote from an opportunity, but it is not passed into Oracle Order Management when converting a quote to an order.

Bill-To Information:

- **Bill-To Customer** — The name and financial account of the customer to be invoiced for the goods or service ordered.
- **Bill-To Contact** — A person representing the bill-to customer who deals with all invoice-related matters for the order, only when the billing customer is of party type **Organization**. Optional field.
- **Bill-To Address** — A physical location where the invoice is sent. This address can be associated with either the bill-to customer or the bill-to contact. If you choose an address that is not of type bill-to, then it is created as a bill-to address when the quote is submitted as an order.

Ship-To Information

- Ship-to Customer — The name and financial account information of the customer to whom the goods or services are delivered.
- Ship-to Contact — A person representing the shipping customer, only when the shipping customer is of party type **Organization**, who deals with all shipping related issues for the order, and who typically receives the shipment. Optional field.
- Ship-to Address — A physical location where the products are sent. The ship-to address can be associated with either the ship-to customer or ship-to contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is saved.

24.1.2 Creation of Accounts

Out of the box, Oracle Quoting does not require financial accounts—for parties 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 the *Oracle Quoting Implementation Guide*

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

The following table shows the behavior of Oracle Quoting based on the settings of the profile options.

Table 24–1 Quoting Behavior Based on Profile Options

| 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 party does not have any | Create account | Create account if party does not have any | NA | NA | NA |
| 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 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 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 when the user saves a quote. In addition, each time a new party is created, an account is created as well.

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 party on the quote (that does not have an account) when the quote is converted into an order.

24.2 Creating a Customer

You can create customers in the Forms UI by selecting **Enter Customer** from the Actions menu. This menu option calls up the Oracle Receivables form that you can use to create customers. Refer to the *Oracle Receivables User's Guide, Release 11i* for more information.

Note: The Oracle Receivables **Enter Customer** form always creates accounts for new customers. Thus, this form must be disabled if users should be able to create customers without creating financial accounts. See the *Oracle Quoting Implementation Guide* for more information.

To create a new customer in Oracle Quoting:

Prerequisites

ASO: Create New Customer must be set to **Yes** at the appropriate level.

Steps

1. Select **Actions > Enter Customer** and select **OK**.

The Oracle Receivables customer form appears.

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

Note: You can create prospect customers from Quoting - HTML, Oracle Telesales, or Oracle Sales Online.

Entering Address and Payment Information

This section contains the processes and procedures necessary for entering and maintaining address and payment information.

- [Overview of Address and Payment Information](#)
- [Entering Billing Information](#)
- [Entering Shipping Information](#)
- [Entering Quote-to Address](#)
- [Entering Line-level Billing](#)
- [Entering Line-Level Shipping](#)
- [Entering Line Level Shipping Details](#)
- [Entering Header Shipping Details](#)
- [Entering Header Payment Information](#)

25.1 Overview of Address and Payment Information

You can designate a number of different addresses on a quote. Each address serves a different purpose, but they are not all mandatory.

- **Quote-To Address** — Physical address associated with the Quote-To customer or contact.

The Quote-to address is an optional address. It may be passed to the quote from an opportunity, but it is not passed into Oracle Order Management when converting a quote to an order.

- **Ship-To Address** — Address where the order is sent.

The ship-to address can be associated with either the ship-to customer or ship-to contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is submitted as an order.

- **Bill-To Address** — Address where the bill is sent.

This address can be associated with either the bill-to customer or the bill-to contact. If you choose an address that is not of type bill-to, then it is created as a bill-to address when the quote is submitted as an order.

You can also designate billing and shipping addresses at the line level. Therefore, if you have an order where you need to invoice some of the items to one location and invoice part of the order to another location or organization, you can designate that information in the quote.

Line level billing is controlled by the profile option **ASO: Enable Line Level Billing**. Line level billing is available if the payment type is **Cash** or not specified and the Purchase Order number is not specified. Line level billing is not supported if payment type is **Credit Card** or **Check**, or a purchase order number is specified.

25.2 Defaulting of Addresses

Addresses are defaulted into the Addresses tab of the Quoting form, based on the following conditions, when creating quotes standalone, from opportunities, or from templates.

Quote-To Address

The Quote-To Address is defaulted at the time of quote creation either from the search results or as described below.

If Quote-To Customer is an Organization and the Quote-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Sold-To address type usage for the Quote-To Contact
- b. Identifying address for the Quote-To Contact
- c. Active Primary Sold-To address type usage for the Quote-To Customer
- d. Identifying address for the Quote-To Customer

If the Quote-To Customer is an Organization and no Quote-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Sold-To address type usage for the Quote-To Customer
- b. Identifying address for the Quote-To Customer

If the Quote-To Customer is of type Person, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Sold-To address type usage for the Quote-To Customer
- b. Identifying address for the Quote-To Customer

Bill-To Address

The Bill-To Address is defaulted at the time of order creation based on the following conditions:

If Bill-To Customer is an Organization and the Bill-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Bill-To address type usage for the Bill-To Contact

- b. Identifying address for the Bill-To Contact
- c. Active Primary Bill-To address type usage for the Bill-To Customer
- d. Identifying address for the Bill-To Customer

If the Bill-To Customer is an Organization and no Bill-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Bill-To address type usage for the Bill-To Customer
- b. Identifying address for the Bill-To Customer

If the Bill-To Customer is a Person, the application searches for a value from the following sources (in the order below) and accepts the first one it finds:

- a. Active Primary Bill-To address type usage for the Bill-To Customer
- b. Identifying address for the Bill-To Customer

Ship-To Address

The Ship-To Address is defaulted at the time of order creation based on the following conditions:

If Ship-To Customer is an Organization and the Ship-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Ship-To address type usage for the Ship-To Contact
- b. Identifying address for the Ship-To Contact
- c. Active Primary Ship-To address type usage for the Ship-To Customer
- d. Identifying address for the Ship-To Customer

If the Ship-To Customer is an Organization and no Ship-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:

- a. Active Primary Ship-To address type usage for the Ship-To Customer
- b. Identifying address for the Ship-To Customer

25.3 Entering Billing Information

To enter a bill-to customer and address for an order:

Note: If you wish to bill individual lines to different locations, refer to [Section 25.6, "Entering Line-level Billing"](#).

Prerequisites

- The customer must be displayed in the Quoting form.
- The individual to be billed and the billing address must already exist in the database.

Steps

1. In the Quote Header tab, select Addresses.
2. Optionally, select **Copy From Quote To** to copy the bill-to address from the quote-to address.
3. Use the Customer LOV to select the customer's name. The account (if any) is copied to the Bill To Account field.

Note: The maximum number of results in the LOVs for the Bill To customer and account at the header and line level is limited by the profile option **ASO: Max Number of Results**.

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

Note: The Bill-To account is optional when creating/saving the quote, unless the bill-to customer has at least one active account.

If the Bill-To Customer is copied from the Quote-To Customer, the Quote-To account value is copied into the Bill-To Account field.

5. Optionally, use the Contact LOV to select the name.

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

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

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

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

Note: If the selected Bill-To address is not of usage type *bill-to*, it will be created as a bill-to address when the quote is created/saved.

7. Save the quote.

25.4 Entering Shipping Information

Note: If you wish to ship individual lines to different locations, refer to [Section 25.7, "Entering Line-Level Shipping"](#).

To enter a ship-to customer and address for an order:

Prerequisites

- The customer must be displayed in the Quoting form.
- The individual to ship to and the shipping address must already exist in the database.

Steps

1. In the Quote Header tab, select Addresses.
2. Optionally, select **Copy From Quote To** to copy the ship-to address from the quote-to address.
3. Use the Customer LOV to select the customer's name. The account (if any) is copied into the Ship To Account field.

Note: The maximum number of results in the LOVs for the Bill To customer and account at the header and line level is limited by the profile option **ASO: Max Number of Results**.

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

Note: The Ship-To account is optional when creating/saving the quote, unless the ship-to customer has at least one active account.

If the Ship-To Customer is copied from the Quote-To Customer, the Quote-To account value is copied into the Ship-To Account field.

5. Optionally, use the Contact LOV to select the name.

The LOV displays only contacts (parties of type **Person**) that have a valid relationship with the ship-to party.

6. Use the LOV to select the ship-to address.

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

Note: If the selected Ship-To address is not of usage type "Ship-to," it will be created as a Ship-to address when the quote is created/saved.

7. **Save** the quote.

25.5 Entering Quote-to Address

To designate a quote-to address:

Prerequisites

None

Steps

1. In the Quote Header tab, select Addresses.
2. Optionally, enter a phone number.

A value is defaulted into this field, based on the following conditions:

- * If the quote-to customer is an organization and a quote-to contact is specified, this field is populated with the contact's phone number.
 - * If the quote-to customer is an organization without and no contact is specified, no defaulting occurs.
 - * If the quote-to customer is a person, this field is populated with the primary phone number for the quote-to customer.
3. Use the Address LOV to select a quote-to address. The LOV displays all addresses for the customer and quote-to contact.

The corresponding address fields are automatically populated.

Note: If the selected Quote-To address is not of usage type "sold-to," it will be created as a sold-to address when the quote is created.

4. **Save** the quote.

25.6 Entering Line-level Billing

To designate line level billing information:

Prerequisites

- The item for which you want to designate a different billing address, must be displayed in the Quote Lines tab.
- The payment type on the quote must be either **Cash** or blank and there must not be a Purchase Order number specified.
- **ASO: Enable Line Level Billing** must be set to Yes at the appropriate level.
- The highest version of the quote must be used.
- The line must not be a component of a configured product.

Steps

1. Navigate to the Lines tab and select Bill-To from the drop-down menu.
2. In the appropriate line, use the Customer LOV to select a customer.

The behavior of this field depends on the setting of profile option **ASO: Enforce Account Relationships**. See [Section 24.1.2, "Creation of Accounts"](#).

3. An account number is defaulted into the Account field. Optionally, use the Account LOV to select a different account for the customer.

If the customer is not specified, you can directly select an account. The customer for the account will be copied to the account field.

4. Optionally, use the Contact LOV to select a contact.
5. Use the Address LOV to select a line bill to address.
6. **Save** the quote.

25.7 Entering Line-Level Shipping

To designate line level shipping information:

Prerequisites

- The item you want to designate a different shipping address for, must be displayed in the Quote Lines tab.
- The line must not be a component of a configured product.
- The highest version of the quote must be used.
- The quote is not in a read-only status.

Steps

1. Navigate to the Lines tab and select Ship-To from the drop-down menu.
2. In the appropriate line, use the Customer LOV to select a customer.

The behavior of this field depends on the setting of profile option **ASO: Enforce Account Relationships**. See [Section 24.1.2, "Creation of Accounts"](#).

3. An account number is defaulted into the Account field, if one exists. Optionally, use the Account LOV to select a different account for the customer.

If the customer is not specified, you can directly select an account. The customer for the account will be copied to the account field.

4. Optionally, use the Contact LOV to select a contact.
5. Use the Address LOV to select a line ship to address.
6. **Save** the quote.

25.8 Entering Line Level Shipping Details

You can enter line level shipping information in the Quote Lines tab. You can specify:

- Requested Date
- Ship From Warehouse
- Shipping Method
- Shipment Priority
- FOB
- Freight Terms
- Shipping Instructions
- Packing Instructions

Prerequisites

- The line must not be a component of a configured product.

Note: You can specify the Warehouse and Requested Date for a component.

- The highest version of the quote must be used.
- The quote must not be in a read-only status.

Steps

1. Select **Shipping** from the drop-down menu on the Quote Lines tab.
2. Select the line for which you want to designate line level shipping.
3. Optionally:
 - Enter a Requested Date.
 - Enter a ship from Warehouse.
 - Select a Shipping Method.
 - Select a Shipping Priority.
 - Select an FOB.

- Select the Freight Terms
 - Enter Shipping Instructions.
 - Enter Packing Instructions.
4. Save the quote.

25.9 Entering Header Shipping Details

You can specify the following header-level shipping details on a quote:

- Requested Date
- Ship From Warehouse
- Shipping Method
- Shipment Priority
- FOB
- Freight Terms
- Shipping Instructions
- Packing Instructions

To enter shipping details:

Prerequisites

None

Steps

1. Select **Payment, Shipping** from the drop-down menu on the Quote Header tab.
2. Optionally:
 - Enter a Requested Date.
 - Select a Shipping Method.
 - Select a Shipping Priority.
 - Select an FOB.
 - Select the Freight Terms
 - Enter Shipping Instructions.
 - Enter Packing Instructions.
3. Save the quote.

25.10 Entering Header Payment Information

Note: Oracle Quoting supports the use of Payment Terms Substitution. Please see [Section 23.1.6, "Terms Substitution"](#) for more information.

To enter payment information for your customer:

Prerequisites

The Quote Header tab displays the customer.

Steps

1. In the Quote Header tab, select **Payment, Shipping** from the drop-down menu.
2. Select the payment terms using the Payment Terms LOV.

Payment Terms are defaulted at the time of quote creation, based on the following conditions:

- Header-level Agreement
- Quote-To Customer Account

Payment term defaulting can also occur when the Header-level Agreement is assigned or changed, or the Quote To Customer Account is assigned.

3. Enter a Purchase Order number, if necessary.
4. From the Payment Type drop-down menu, select the payment type.
Available payment types: Cash, Check, Credit Card, or blank.
 - If you selected **Check** as the payment type, then enter the check number in the Check Number field.
 - If you selected **Credit Card** as the payment type, then:
 - a. From the Credit Card drop-down list, select the credit card type.
 - b. Enter the credit card holder's name.
 - c. In the Credit Card Number field, enter the credit card number.
 - d. Enter the credit card expiration date.
5. Select **Save**.

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

Modifying Quotes

This chapter contains information on modifying quotes in Oracle Quoting. Sections include:

- [Modifying a Customer Quote](#)
- [Adding Products to the Quote](#)
- [Removing Products from the Quote](#)
- [Adding a Service to the Quote](#)
- [Entering Installation Details](#)
- [Duplicating a Line](#)
- [Configuring a Product](#)
- [Adding a Related Product](#)
- [Checking Product Availability](#)
- [Allocating Sales Credit](#)
- [Adding Trade-In Products to Quotes](#)
- [Using Descriptive Flexfields](#)
- [Splitting Lines](#)
- [Entering Tax Details](#)
- [Viewing Quote Tax Details](#)
- [Viewing the Quote Versions](#)
- [Viewing Customer Quotes](#)
- [Viewing the Order History for a Customer](#)

26.1 Modifying a Customer Quote

To find and modify a customer quote:

Prerequisites

If finding and modifying quotes using the Customer History form, the customer must be displayed in the Oracle Quoting form.

Whether you can modify a quote depends on its status. Not all quote statuses allow you to make modifications. For more information on the quote statuses permitting updates, see [Section 20.1.2, "Quote Status"](#) or the *Oracle Quoting Implementation Guide*.

Steps

1. Locate the quote to modify using one of the following methods:
 - a. The Quote search procedure outlined in [Section 21.2, "Searching for Quotes"](#).OR
 - a. The procedure outlined in [Chapter 21.1, "Searching Using the Query Method"](#).OR
 - a. From the Reports menu, select **Customer History**. The Customer History window appears.
 - b. Select the Quotes tab. The tab lists all quotes for this customer.
 - c. If you wish to view the quote and modify it, select **View Quote**. The quote displays in the Oracle Quoting form. Only the latest version of a quote can be modified.
2. Modify the quote by:
 - Altering customer information
 - Changing product quantities
 - [Adding Products to the Quote](#)
 - [Entering Header Payment Information](#)
 - [Entering Billing Information](#)
 - [Entering Shipping Information](#)

- [Creating an Attachment](#)
- [Viewing and Adding Notes to a Quote](#)

3. Select **Save**.

Depending on the status of the quote, the changes you make are saved either in the version of the quote you are editing or in a new version. See [Section 20.1.2, "Quote Status"](#) for more information.

26.2 Adding Products to the Quote

To add products to the quote:

Prerequisites

Your customer is displayed in the Header tab of the Oracle Quoting form.

Steps

1. Navigate to the Quote Lines tab.
2. Place your cursor in the Product field in the first available line.
3. If the Product field already displays a product, select **New Record** in the toolbar.
4. Use the Product LOV to select the product or enter the product description or part number. The behavior of this field depends on whether interMedia Search is enabled. See [Section 21.4, "Using interMedia Search"](#) for more information.

The product displays in the tab.

Or use the product search, by selecting **Actions > Product Search**, to copy and paste the part number from the search results to the Product field.

5. Select the **Product Details** button to view the product details.

This Product Details form indicates the user item type and whether the product is returnable, serviceable, shippable, or is a support service.

6. Optionally, update the defaulted UOM.
7. Enter the quantity in the Qty field.

The quantity defaults from the profile option **ASO: Default Ordered Qty in OC UI**. See the *Oracle Quoting Implementation Guide* for more information.

8. Use the Price List LOV to select a price list for the line. You can only select a price list if **ASO: Price List Override** is set to **Yes**.
9. If the Item Type is **Model**, then the product is configurable. The product displayed is the base model. You can configure this product to add more components. See [Section 26.7, "Configuring a Product"](#) for more information.

For all other products the product pricing appears. The Unit Price shows the list price on the price list shown in the Price List field.

10. Save the quote.
11. Repeat this procedure to add other products to the quote.

26.2.1 Line Numbers

Line numbering in the Quoting UI is based on product type. Line numbers are formatted as follows: A.B.C

The first tier, A, indicates a major line number grouping. The line numbering for this group starts with 1 and each additional group increments by 1. This group includes the following product types:

- Standard product that is not a top level model, model component, or serviceable product
- Serviceable product without service products attached
- Service product associated with a serviceable product on a pending order or in the customer's installed base
- Top level model and selected components under the model
- Serviceable product and any service products associated with it
- Trade-in top level model
- Selected trade-in component under the trade-in model

The second tier, B, indicates a component within a model configuration. The first component has a value of 0, while each additional component increments by 1.

The third tier, C, indicates a service. This applies only to a service associated with a serviceable product in the current quote.

The following table shows an example of what quote line numbers look like based on product type.

Table 26–1 Line Numbers and Product Types

| Line Number | Product Type |
|--------------------|--|
| 1.0 | Standard Product |
| 2.0 | Top level model product |
| 2.0.1 | Service for model in line 2.0 |
| 2.0.2 | Service for model in line 2.0 |
| 2.1 | Component #1 (option class) |
| 2.1.1 | Service for component in line 2.1 |
| 2.2 | Component #2 (Child of option class) |
| 3.0 | Service for serviceable product in the Installed Base or Pending Order |
| 4.0 | Serviceable product |
| 4.0.1 | Service for serviceable product in line 4.0 |
| 4.0.2 | Service for serviceable product in line 4.0 |

You can insert or delete lines between existing lines and the line numbers will be adjusted accordingly. Line numbers displayed on the quote print out match the line numbers in the Quote Lines tab. Quote line numbers are not passed to Oracle Order Management when a quote is converted into an order.

26.3 Removing Products from the Quote

To remove products from the quote:

Prerequisites

There must be at least one product in the quote.

Steps

1. Navigate to the Quote Lines tab.
2. Highlight the line to remove.
3. From the Edit menu, select **Delete**.
4. You are asked to confirm the deletion. Select **Ok**.

The line is removed from the quote and the remaining lines are renumbered.

26.4 Adding a Service to the Quote

Services are available in Oracle Quoting for serviceable products on the current quote, serviceable products that have been ordered but have not yet shipped, and serviceable products that were shipped and received.

Note: Services apply to Serviceable products and cannot be sold without referencing a serviceable product on a current quote, order, or customer installed base.

There are two types of services:

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

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

- Extended Warranties — Services that may be purchased in addition to a serviceable product. Extended warranties are designated in Oracle Inventory as follows:
 - Service is checked

- Warranty is unchecked.

Validation of the relationship between a serviceable product and a service is performed in Oracle Service Contracts. Oracle Service Contracts determines which services are available for a serviceable product. For each service, customers and serviceable products can be excluded.

When a service is purchased, the following conditions must be present:

- The service must reference a serviceable product that is:
 - On the current quote
 - Purchased but has not yet shipped
 - Purchased and recorded in the customer install base
- There should be a valid relationship between the service and serviceable products:
 - No relationship — There are no exclusions set up in Oracle Service Contracts, and therefore every service can be purchased for a serviceable product.
 - Oracle Service Contracts — Serviceable product and customer do not appear on the list of exclusions for the selected service.
- The serviceable product used as a service reference cannot be a trade-in.
- The period and duration must meet the minimum period and duration set in Oracle Service Contracts.

26.4.1 Adding a Service to a Serviceable Product on the Quote

To enter a service for a serviceable product on the current quote:

Prerequisites

- The quote line must be saved.
- The product must be a serviceable product.
- The product must not be a trade-in product.

Steps

1. Add a serviceable product. See [Section 26.2, "Adding Products to the Quote"](#) for more information on adding products.

2. Select **Actions > Service Items > OK**.

The Service Items form opens displaying included services, services already included with the serviceable product, and available extended services.

3. Highlight the extended service to apply to the serviceable product in the Other Available Services table and select **Add to Quote**.

The Price Lists form opens if the service is not on the current price list.

4. Choose a price list and select **OK**.

The service product displays in the Quote Lines tab as a subset of the serviceable product. The duration, period, and start date default into the line.

5. Optionally, change the Duration, Period, or Start Date for the service.
6. Save the quote.

26.4.2 Adding a Service to the Quote

To add a service to a quote that does not contain serviceable products:

Prerequisites

None

Steps

1. Navigate to the Service region of the Quote Lines tab.
2. Place your cursor in the Product field.
3. If the line already displays a product, then select **New** in the toolbar.
4. Either enter the part number into the field or use the LOV to select the product.
The duration, period, and start date default into the appropriate fields.
5. Optionally, change the Duration, Period, or Start Date.

Note: The actual start date of a service is different from the date you enter in the Start Date field when adding a service to a quote.

If the serviceable product for the service is already in Oracle Install Base, then the start date is the day the product is ordered.

If the service is for a serviceable product that you are ordering, the start date is the actual shipping date of the product plus the value in the Service Starting Delay field (defined for the product in Oracle Inventory).

6. Optionally, change the quantity.
7. In the Details section, select **Reference**.
8. Select the appropriate category from the Service For list:
 - **Current Quote:** If the service is for a product in the current quote
 - **Pending Orders:** If the service is for a product in an order
 - **Installed Base:** If the service is for a product already installed at a customer site.
9. If the service is for a product on the current quote:

- a. Use the Product LOV to select the product number, or use the Description LOV to select the product description.
 - b. Select **Search**. The Service Reference form displays all available lines on the quote that match the search criteria.
 - c. Select the quote line to associate the service with and select **Apply**.
The service is displayed in the Quoting form as a separate quote line. The service information is displayed in the Service section of the Quote Lines tab. The service line appears after the corresponding serviceable product.
10. If the service is for an ordered product:
- a. Search for a serviceable product on a pending order using one (or a combination) of the criteria below:
 - * Order Number
 - * System Name
 - * Product
 - * Description
 - * Order Dates
 - * PO Number
 - b. Select **Search**. The Service Reference form displays all available lines on pending orders or a specific pending order that matches the search criteria.
 - c. Select the serviceable product to associate the service with and select **Apply**.
 - d. The service is displayed in the Quoting form as a separate quote line. The service information is displayed in the Service section of the Quote Lines tab
11. If the service is for a product in the customer's installed base:
- a. Search for a serviceable product in the customer's Installed Base using one (or a combination) of the following criteria:
 - * Serial Number
 - * System Name
 - * Order Number
 - * Product
 - * Description

- * Order Dates
 - b. Select **Search**. The Service Reference form displays all available lines in the customer's installed base that match the search criteria.
 - c. Select the serviceable product to associate with the service and select **Apply**.
 - d. The service is displayed in the Quoting form as a separate quote line. The service information is displayed in the Service section of the Quote Lines tab.
12. Repeat this procedure to add other products to the quote.
13. When you are done you are ready to:
- Create a quote
 - Place an order

26.5 Entering Installation Details

This menu option is available only if the Network Logistics Trackable flag is enabled for the product. This flag is set in the Item master definition in Oracle Inventory.

To enter installation details for a product that is Network Logistics trackable:

Prerequisites

- The product must be saved and selected in the Quote Lines tab.
- The user must have **Update** access to the quote.
- The highest version of the quote must be used.
- The quote must not be in a read-only status.
- The **Network Logistics Trackable** flag must be set to **Yes** for the product.
- The quote must not be submitted for batch pricing.

Steps

1. Select **Actions > Installation Details > OK**.

The Transaction Details form appears. This is an Oracle Install Base form.

2. Fill out the form as described in the "*Using the Transaction Details Window*" section of the *Oracle Install Base Concepts and Procedures*.

3. Save your changes.

The installation details are passed to the order when the quote is submitted to Oracle Order Management.

26.6 Duplicating a Line

When you duplicate a line, line level attributes, including price list, line level billing, line level flexfields, and line level attachments are copied into the new line. If a service is associated with the line, the service is copied as well.

To duplicate a line:

Prerequisites

- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote line must not be a service.
- The quote line must not be a model component.
- The quote line must not be a trade-in from the Installed Base.
- The quote must not be submitted for batch processing.

Steps

1. Navigate to the Quote Lines tab.
2. Select the quote line to copy.
3. Select **Actions > Duplicate Line > Go**.

The duplicated line is added after the last line in the quote.

26.7 Configuring a Product

To configure a model product:

Prerequisites

- Verify that the product is a model product by selecting the oval button to the right of the Description field or by exposing the Configurable field in the

Pricing region of the Quote Lines tab. This button accesses the Product Details form.

- The quote must be saved.
- The user must have **Update** access to the quote
- The highest version of the quote must be used
- The quote must not be in a read-only status
- The quote must not be submitted for batch pricing.
- You can only change the quantity of model products if **ASO: Allow Quantity Updates for Top Level Model Item** is set to **Yes**.
- You can only change the quantity for components if **ASO: Allow Quantity Updates for Component Item** is set to **Yes**.

Steps

1. Add a model product to the quote using the procedure outlined in [Section 26.2, "Adding Products to the Quote"](#).

The model product appears in its own line on the quote. The Model Status field indicates if the model is incomplete. If the field is blank, the model is complete. If there is an * in the field, the model is incomplete.

2. Place your cursor in the line to configure.
3. Select **Configure**. The Oracle Configurator form appears.
4. Configure the product as necessary. See the latest Oracle Configurator documentation for more information.

Note: Additionally, ensure that there are no red asterisks in the category folder icons in the Oracle Configurator form. A red asterisk next to a category can indicate that the category is incomplete.

5. Select **Done**. The products you selected are added to the quote as separate lines.
6. Optionally, change the quantity of the top level model or one of its components by overwriting the value in the Quantity field and saving the quote. If changing the quantity of the top level model product, the quantity of all the components will be updated to match the model product's quantity. If changing the quantity

of a component, the top level model product and all other components will be updated to match the quantity.

Note: To ensure that the product has been properly configured, verify that there is no asterisk in the Model Status field.

26.7.1 Deleting a Component

You can delete components of model products without invoking Configurator. Configurator rules are invoked after each deletion and the incomplete indicator appears if the deletion results in an incomplete configuration. If the deletion results in an invalid configuration, you cannot save the configuration. The configurations for the model products and components revert back to the previously saved configurations.

Note: If you delete a component with an associated service, the service is deleted as well.

Prerequisites

- **ASO: Allow Quantity Updates for Component Item** must be set to **Yes**.
- The user must have update access to the quote
- The quote must not be in a read-only status
- The highest version of quote must be used
- The quote must not be submitted for batch processing

Steps

1. Navigate to the Quote Lines form.
2. Select the component to delete and select **Delete** from the Edit menu.
3. You are asked to confirm the deletion. Select **Ok**.
4. The component is removed from the configuration and the remaining lines are renumbered accordingly.

26.7.2 Duplicating an Existing Configuration in a Quote

You can copy a top level model product to a new model product within a quote. When copied, the top level model product and its components are an exact copy of the original configuration. If the original configuration has services associated with it, they are copied into the new configuration. Line level attributes, including price list, line level billing, line level flexfields, and line level attachments are copied as well.

Prerequisites

- Verify that the product is a model by selecting the Product Details link or the Configurable checkbox
- The user must have update access to the quote
- The quote must not be in a read-only status
- The highest version of the quote must be used
- The quote line must not be a service, a model component, or a trade-in from the Installed Base
- The quote must not be submitted for batch processing

Steps

1. Navigate to the Quote Lines form.
2. Select the Configuration line to copy.
3. Select **Actions**.
4. Choose **Duplicate Line** > **OK**. The duplicated configuration is added after the last line in the quote.

26.7.3 Splitting a Configured Line

If you split a configured line, the new model and its components appear on a separate line as an exact duplicate of the original line. The relationships are preserved. All services and line attributes (price list, line level billing, line level shipping, line level attachments, etc.) are copied as well.

To split a configured line:

Prerequisites

- The quantity of the line you want to split must be greater than 1.

- The user must have update access to the quote.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The quote line must not be a model component.
- The quote line must not be a service.
- The quote line must not be a trade-in from the Installed Base.
- The quote must not be submitted for batch processing.

Steps

1. Select the configured line to split.
2. Select **Actions > Split Line > OK**. The Split Line form opens.
3. In the Split field, enter the quantity you want to split into another line.
4. Select **Apply**. The Lines page displays the split quantities as separate lines.

26.8 Adding a Related Product

To sell a related product to your customer:

Prerequisites

- Related products must be set up for this product.
- The user must have Update access to the quote.
- The highest version of the quote must be used.
- The quote must not be in a read-only status.
- The product must not be a trade-in product.
- The quote must not be submitted for batch pricing.

Steps

1. Navigate to the Quote Lines tab.
2. Select the line to which you want to add related products.
3. Select **Actions > Add Related Products > OK**.
4. To add a related product to the quote:
 - a. Highlight a product in the list.
 - b. Select **Apply**.

A window displays the available price lists for the currency. If only one price list exists, Oracle Quoting automatically chooses that price list and prices the product accordingly.
 - c. Choose a price list for the related product.
 - d. Select **OK** to close the price list window and return to the Oracle Quoting form.
5. Repeat the procedure for other products, if any.

The product you selected in the Related Products window is inserted after the related product and the line numbers are recalculated accordingly.
6. Save the quote.

After saving the quote, the related product is assigned a line number.

Guidelines

Choosing a related product changes the quote as follows:

- Adding an up-sell product replaces the product in the quote.
- Adding a cross-sell product adds the product to the quote. You can add multiple cross-sell products to the quote.
- Adding a substitute product replaces the product in the quote.
- Adding any other relationship type adds the product to the quote.

26.9 Checking Product Availability

Quoting will automatically assign a warehouse based on Inventory sourcing rules or the value in profile option **ASO: Default Ship From Org**. This inventory warehouse is used for ATP checks and scheduling once the order is booked in Order Management.

You may override this warehouse if the profile option **ASO: Enable Manual Warehouse** is enabled, by changing the value in the Warehouse field of the ATP form. The warehouse you select is saved with the quote line and all subsequent ATP checks are performed against the designated warehouse.

The point at which inventory products are reserved depends on the setting of the system profile option **ASO: Reservation Level**. Contact the application administrator for details. Products are not reserved for your customer before you successfully place the order.

If you want to check the availability for the order as a whole, the cursor must be in the header section of the Oracle Quoting form. If you want to check the availability of a specific product, the product must be displayed in the Oracle Quoting form and the cursor must be in a Quote Lines tab field.

To find out when the desired quantity of an product will become available:

Prerequisites

The line must not be for a trade-in.

Steps

1. Select **Actions > Check Availability > OK**. The Available To Promise form opens, displaying either the single selected product or a list of the products in the quote.

The Available To Promise displays for each product:

- UOM
- Quantity
- Request Date
- Available
- Available Date
- Warehouse
- On Hand

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

2. Select **OK**.

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

26.9.1 Manually Selecting a Warehouse

To manually select the warehouse from where the current product will ship:

Prerequisites

- The profile option **ASO: Enable Manual Warehouse** must be set to **Yes**.
- The quote must be saved.

Steps

1. Navigate to the Shipping section of the Quote Lines tab and select the product for warehouse designation.
2. Use the LOV to select a Requested Date.
3. Use the LOV to select a Warehouse against which the ATP check is performed.
4. Save the quote.

ATP checks are performed against the selected warehouse.

26.9.2 Saving the Manually Selected Warehouse for Future ATP Checks

You can save the warehouse so that it is used for subsequent ATP checks.

Prerequisites

The profile option **ASO: Enable Manual Warehouse** must be set to **Yes**.

Steps

1. Navigate to the Shipping section of the Quote Lines tab and select the product with the designated warehouse.
2. Select **Actions > Check Availability > OK**.
The Available to Promise forms displays.
3. Ensure that the Save Warehouse flag is selected for the product.
Optionally, to clear the saved warehouse, deselect the Save Warehouse box.
4. Select **OK**.

26.10 Allocating Sales Credit

When there are multiple sales representatives involved in a sales process, you may need to allocate sales credits appropriately.

If you do not specify header level sales credits, the header level sales credit defaults 100% to the primary salesperson. Sales credits entered at the header level default to the line level during the sales compensation calculations.

Sales credits can also be specified at the line level. If changes are made at the line level and additional changes are made later at the header level, the header level changes will not be reflected at the line level.

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

To allocate sales credits at the header and line levels to any number of sales representatives:

Prerequisites

The resource for sales credit allocation must be set up in Oracle Receivables as a valid sales representative for the quote-to customer.

Steps

1. To allocate a sales credit at the header level, place the cursor in the header of the Oracle Quoting form.

To allocate a sales credit at the line level, place the cursor in the Quote Lines tab.

2. Select **Actions > Assign Sales Credits > OK**.
3. Use the Salesperson LOV to select the sales representative for sales credit allocation.
4. Optionally, select a Sales Group for the salesperson.
5. Use the Credit Type LOV to enter the type of sales credit.

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

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

6. Enter the percent of the allocation.

Note: The Revenue Total box must be blank or equal 100%.

7. Repeat this process for each sales representative credit allocation.
8. Select **Apply** to save your changes.

26.10.1 Removing a Sales Credit Allocation

To remove a sales credit allocation:

Prerequisites

None

Steps

1. To remove a sales credit at the header level, place the cursor in the header of the Oracle Quoting form.
To remove a sales credit at the line level, place the cursor in the Quote Lines tab.
2. Select **Actions > Assign Sales Credits > OK**.
3. The Sales Credits form opens.
4. Select the allocation and select **Remove**.
5. The sales credit allocation is removed and the Revenue and Non-Revenue totals are recalculated.
6. Select **Apply** to apply the change and return to the main Quoting form.

Note: If you remove a sales credit allocation and select **Cancel** instead of **Apply**, the allocation will not be removed from the quote even though it disappears when you select **Remove**. You must select **Apply** to apply the change to the quote.

26.11 Adding Trade-In Products to Quotes

This procedure allows you to provide credit to customers for returning existing products when purchasing new products.

Note: If customers have trade-in products, they must also purchase products in the same quote. The order total cannot be negative. The Total Price and Line Total is displayed as a negative value for the trade-in product.

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

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

The Line Category field is governed by the Order Type field in the Summary section. Oracle Quoting supports two Order category types:

- **Order** — Quotes can contain only orderable products.
- **Mixed** — Quotes can contain other line types in addition to **orderable**.

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

To enter a product as a trade-in:

Prerequisites

- The product that the customer wants to trade in must be set up with the line type **Return** in Inventory.
- The product must be **returnable**. To verify that it is returnable, select the oval button located next to the Description field in the Pricing Details section of the Quote Lines tab.
- The profile option **ASO: Enable Line Type** must be set to **Yes**.

Steps

1. Create a quote by entering the customer information. See [Section 20.2, "Creating a Quote"](#) for more information.
2. Navigate to the Quote Lines tab.
3. In the Details section, select **Return** in the Line Category field.
4. Use the Product LOV to select the trade-in product.
5. Save the quote.

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

OR

1. If a product has been added with an Order line type, check if it is Returnable by selecting the oval button to the right of the Description field or expose the Returnable field in the Pricing region of the Quote Lines tab.
2. Save the quote.

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

26.12 Splitting Lines

In Oracle Quoting, you can split a line if the quantity is greater than 1. This is useful if you want to order a large quantity of one product with various ship-to and bill-to addresses. For example, if want to order 5 laptops, and ship 3 of them to one location and 2 to another.

To split a line:

Prerequisites

- The quote line must be saved and selected in the Quote Lines tab.
- The user must have Update access to the quote
- The highest version of the quote must be used
- The quote must not be in a read-only status
- The product must not be a service
- The product must not be a trade-in product
- The product must not be a model component
- The quote must not be submitted for batch pricing.

Steps

1. Select **Actions > Split Line** and select **OK**. The Split Lines form opens.
2. Enter the quantity you want to split to another line in the Split Quantity field.
The Total field displays the summation of the Split Quantity values.
3. Select **Apply**.
In the Quote Lines tab the quantity you split is a separate line.

26.13 Entering Tax Details

There are three tax options:

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

The following tax details are displayed for each distinct tax code on the quote:

- Tax code
- Total tax amount for the tax code
- Tax exempt reason and number, if quote is tax exempt

To enter tax exemption information for a quote:

Prerequisites

None

Steps

1. Select **Tax** from the drop-down menu on the Quote Header tab.
2. Use the Tax Handling LOV to select the tax method.
 - a. If you select Exempt, then:
 - * Enter the exempt number in the Exempt Number field. You can select an pre-defined tax exemption certificate from the LOV or enter a new, unapproved exemption number certificate.
 - * Enter an exempt reason in the Exempt Reason field.

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

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

- * **Save** the quote.
- b. If you select **Require**, save the quote.
- c. If you select **Standard**, save the quote.

26.14 Viewing Quote Tax Details

You can view tax details for each quote line.

To view tax details:

Prerequisites

The line for which you want to view tax details must be selected in the Quote Lines tab.

Steps

1. Select **Actions > Tax Details** and select **OK**. The Tax Details form opens.

The following tax details are displayed:

- * Tax code
 - * Tax rate
 - * Tax amount
2. Select **OK** to return to the Quote Lines tab.

26.15 Viewing the Quote Versions

Use this procedure to view the versions of the current quote. Details include:

- Version Number
- Status
- Amount
- Currency
- Created By
- Creation Date
- Updated By
- Update Date

Prerequisites

The quote must be displayed in the Oracle Quoting form.

Steps

1. Navigate to the Quote Versions tab. The Quote Versions tab lists the following information about each version:
 - Version Number
 - Status
 - Amount
 - Currency
 - Created By
 - Creation Date
 - Updated By
 - Update Date
2. Optionally, select a version and select **View**. The version is displayed in the Quoting form.

26.16 Viewing Customer Quotes

There are two methods a user can use to find and view quotes:

- Quote Search
- Customer History form

For information on Quote Search, see [Section 21.2, "Searching for Quotes"](#).

26.16.1 Using the Customer History Form to View Customers Quotes

Use this procedure to view a list of the quotes prepared for the current customer. In this window you can identify which quotes were created from opportunities as well as those quotes converted to orders or leading to contracts.

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

Prerequisites

The customer must be displayed in the Oracle Quoting form.

Steps

1. From the Reports menu, select **Customer History**. The Customer History window appears.
2. Select the **Quotes** tab.

The tab lists all quotes for this customer. Each line lists quote name, quote number, account number, quote status, quote total, currency, quote expiration, contact name, and salesperson name. You can also view information on the opportunity related to the quote or the number of the order placed from the quote. See [Section 26.1, "Modifying a Customer Quote"](#) if you want to make changes.

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

26.17 Viewing the Order History for a Customer

Use this procedure to view the order history for the customer currently displayed in the Oracle Quoting form. For a given order, the Order History displays information regarding the quote related to the order and the order itself. If an account is selected for the quote-to customer, the Order History displays a list of orders related to the quote-to customer and designated account. You can select a different quote-to customer account using an LOV.

Prerequisites

The quote-to customer must be displayed in the header of the Oracle Quoting form.

Steps

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

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

2. Select the Orders tab.

The Orders tab opens, displaying detailed information for each of the customer's orders, including:

- Order number
- Order status
- Creation date
- Order total
- Currency
- Account number
- Quote number
- Quote name
- Contact name
- Salesperson name

3. Highlight an order to view the order details.
4. Select **View Quote** to view the quote that preceded the order.
5. Select **View Order** to view the Order.

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

6. Select **Cancel** to return to the main Oracle Quoting form.

26.18 Applying an Agreement to the Quote

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

To apply an agreement to a quote:

Prerequisites

An agreement with the current customer or a customer related to the Quote To customer or a universal agreement must exist.

Steps

1. Navigate to the **Quote Header** tab > **Summary** section.
2. Use the Agreement LOV to enter an agreement, if one exists.
3. Save the quote.

The agreement terms are applied to the quote.

Note: The price list and payment terms are defaulted based on the selected agreement.

26.19 Using Descriptive Flexfields

To enter information into flexfields:

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

Prerequisites

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

Steps

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

Copying Quotes

This section contains information on copying quotes.

- [Overview of Copying a Quote](#)
- [Copying a Quote](#)

27.1 Overview of Copying a Quote

In Oracle Quoting you can copy existing quotes to create new quotes or copy a quote to a new version.

The table below lists the information copied to a new quote and to a new version.

Table 27–1 Copy Quote Behavior

| | Copy to New Quote | Copy to New Version (Forms only) |
|---|--------------------------|---|
| Quote Name | Yes | Yes |
| Quote Number | No | Yes |
| Version Number | No | No |
| Opportunity | No | Yes |
| Contract Template | Yes | Yes |
| Contract Number | No | N/A |
| Contract Approval Level | No | Yes |
| Expiration Date | No | Yes |
| Status | No | No |
| Published Flag | No | No |
| Sales Channel | Yes | Yes |
| Campaign | Yes | Yes |
| Primary Salesperson | No | Yes |
| Primary Sales Group | No | Yes |
| Order Number | No | N/A |
| Quote-to Customer (party and account) | Yes | Yes |
| Quote-To Contact | Yes | Yes |
| Quote-To Address | Yes | Yes |
| Ship-To Customer (Party and Account)/Contact/Address at Header Level and Line Level | Yes | Yes |

Table 27-1 Copy Quote Behavior

| | Copy to New Quote | Copy to New Version (Forms only) |
|--|--------------------------|---|
| Shipping Method, Shipping Instructions, Packing Instructions, Requested Delivery Date at Header and Line Level | Yes | Yes |
| Bill-To Customer (Party and Account)/Contact/Address at Header Level and Line Level | Yes | Yes |
| Payment Terms at Header Level | Yes | Yes |
| Payment and Tax Information at Header and Line Level | Yes | Yes |
| Regular Items, Configured Items, Service Items and their reference source, Quantity, and UOM | Yes | Yes |
| Manual Price Adjustments | Yes | Yes |
| Automatic Price Adjustments | Yes | Yes |
| Currency at Header Level | Yes | Yes |
| Price List at Header Level and Line Level | Yes | Yes |
| Pricing Agreement at Header Level | Yes | Yes |
| Promotion Codes at Header and line Level | Yes | Yes |
| Line Types | Yes | Yes |
| Line Category Code | Yes | Yes |
| Order Type | Yes | Yes |
| Sales Credits at Header and Line Levels | Yes | Yes |
| Attachments | User Choice | Yes |

Table 27–1 Copy Quote Behavior

| | Copy to New Quote | Copy to New Version (Forms only) |
|---|--------------------------|---|
| Notes | User Choice | User Choice |
| Descriptive Flexfields at the Header and Line Level | Yes | Yes |
| Sales Team | No | Yes |
| Approval History | No | No |
| Sales Supplement | Yes | No |
| Pricing Updated On | No | No |
| Pricing Status | No | No |
| Tax Updated On | No | No |
| Tax Status | No | No |

27.2 Copying a Quote

You can copy the following quote information:

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

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

To copy a quote:

Prerequisites

The original quote must be displayed in the Oracle Quoting form.

Steps

1. Select **Actions > Copy Quote > OK**. The Copy Quote form displays.
2. In the Copy Quote form under the Copy From heading, highlight the radio button for one of the options below:
 - **Quote Header**

If you choose this option, you can also choose one or more of the following:

 - * **Lines**
 - * **Notes**
 - * **Attachments**
 - **All Quote Information**
3. Under the Copy To heading, highlight the radio button for one of the options below:
 - **New quote**: This option copies the quote information you selected above into a new quote. If the profile option **ASO: Automatic Numbering** is set to **No**, you must enter a quote number in the New Quote Number field. This field is disabled if **ASO: Automatic Numbering** is set to **Yes**.
 - **Version**: This option copies the quote information you selected above into a new version of the existing quote. You cannot create a new version of a quote in *Entered*, *Ordered*, or *Order Submitted* status.
4. Select **OK**. A new or revised quote is created and displays in the Oracle Quoting form.

Initiating Approvals

This chapter discusses the approval process in Oracle Quoting.

- [Overview of Approvals](#)
- [Initiating an Approval](#)
- [Viewing Approval Details](#)
- [Canceling the Approval Process](#)
- [Approving a Quote](#)
- [Rejecting an Approval](#)

28.1 Overview of Approvals

Oracle Quoting uses the Oracle Approvals Management (OAM) engine to define rules governing situations requiring approval. Within OAM, a situation or rule requiring approval is defined using Attributes, Conditions, and Approval Type. Each application integrating with OAM must seed the desired Attributes. Attributes are used to define Conditions, and the Approval Type determines the contents and hierarchy of the approvers. One or more Conditions and an Approval Type constitute a Rule.

A quote can only be submitted for approval if it meets the following conditions:

- The logged in user has Update access to the quote.
- The highest version of the quote must be used.
- There is a transition defined from the current quote status to *Approval Pending*.

28.2 Initiating an Approval

When you initiate an approval, you can view the list of approvers and rules applicable to the quote, if any. If Contracts integration is enabled, and a non-default contract is required, once the quote is approved the quote status changes to *Contract Required*. If the contract approval level is specified or changed, the list of approvers and rules should be automatically recalculated. If you do not require a non-default contract, the quote status changes to *Approved* when the quote receives all required approvals.

The ability to skip approvers is determined by the profile option **ASO: Allow Skip Approvers**.

Prerequisites

- **ASO: Enable Approvals** must be set to **Yes** at the appropriate level.
- The highest version of the quote must be used.
- There is a transition defined from the current quote status to *Approval Pending*.
- The Pricing and Tax status must be Complete.
- The user must have update access to the quote.
- The quote must not be in *Order Submitted* status.
- The quote must not be submitted for batch pricing.

Steps

1. Select **Actions > Approvals > OK**.
2. Select **Initiate Approval Process**. The Initiate Approval form displays the list of approvers.
3. Enter comments to send to the approvers.
4. Optionally, choose to include a non-standard contract with the quote.

Once the quote is approved, the quote is placed in *Contract Required* status. You can request the contract to be authored by the contract administrator.

5. Optionally, choose to skip approvers.
6. Select **Submit for Approval**.

Successful approval submission is confirmed in a pop-up window. The quote is then *Read-only* and is in *Approval Pending* status.

28.3 Viewing Approval Details

To view approval details:

Prerequisites

ASO: Enable Approvals must be set to **Yes** at the appropriate level.

Steps

1. Select **Actions > Approvals > OK**.

The Approvals form displays details about the approval process, including the approval status.

28.4 Canceling the Approval Process

To cancel an approval process:

Prerequisites

- The quote is in *Approval Pending* status.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote must not be submitted for batch pricing.

Steps

1. Select **Actions > Approvals > OK**.
2. Select **Cancel Approval Process**.

The quote is now in *Approval Canceled* status.

28.5 Approving a Quote

Once an approval is initiated, it is passed on to the next approver. Each approver in the hierarchy receives notification that the quote is ready for approval when it is their turn to approve.

To approve a quote:

Prerequisites

ASO: **Enable Approvals** must be set to **Yes** at the appropriate level.

Steps

1. Login to Oracle Self Service Applications.
2. Select **Workflow Administrator Web Applications**.
3. Select **Worklist**.
4. Select the linked name of the quote requiring approval.
5. To view quote details, select **Click Here For Quote Details**.

If you are logged into Oracle Sales Online or the Oracle Quoting - HTML UI, the Quote Overview page opens. If not, the JTF login page opens and you must log in to access the Quote Detail page.

6. Navigate back to the Workflow form.
7. Optionally, enter comments.
8. Optionally, to reject the approval, select **Reject**.
9. Optionally, to reassign the approval, select **Reassign**.
10. Select **Approve**. The Approvals page shows confirmation that the quote was submitted for approval.
11. Select **Result** to view approval details.

28.6 Rejecting an Approval

To reject an approval:

Prerequisites

ASO: Enable Approvals must be set to **Yes** at the appropriate level.

Steps

1. Login to Oracle Self Service Applications.
2. Select **Workflow Administrator Web Applications**.
3. Select **Worklist**.
4. Select the linked name of the quote requiring approval.
5. To view quote details, select **Click Here For Quote Details**. The Quote Overview page opens.
6. Navigate back to the Workflow form.
7. Optionally, enter comments.
8. Select **Reject**. In Oracle Quoting, the quote status is now *Approval Rejected*.

Notes and Attachments

This section contains the processes and procedures necessary to view, add, and modify notes and attachments.

- [Overview of Notes and Attachments](#)
- [Viewing and Adding Notes to a Quote](#)
- [Searching for Notes](#)
- [Creating an Attachment](#)
- [Viewing an Attachment](#)
- [Deleting an Attachment](#)
- [Copying an Attachment from Another Quote](#)

29.1 Overview of Notes and Attachments

Notes contain descriptive information generated by users about specific quotes.

Users can add attachments to their quotes allowing them to store relevant documents or files. Attachments include communications from customers or sales representative's notes about a quote.

29.2 Viewing and Adding Notes to a Quote

Use this procedure to create notes for a quote. Notes contain descriptive information generated by users about business transactions.

Prerequisites

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

Steps

1. Select **Actions > View Notes > OK**. The Notes form opens, displaying all notes relating to the current quote.
2. Select the **Summary** tab to see the user, date created, entered by ID, and the first line of note text for the highlighted note. Use the arrow key to scroll through and view information for each note.
3. Select **New** to create a new note.
4. Enter the note text into the Notes field.
5. Select **More** to enter additional text beyond the character limit in the main notes text box. The Detailed Note form opens, allowing you to add additional text.
6. Select **OK** to close the Detailed Note form.
7. Use the LOV to enter the note type in the Type field.
8. Use the pull down menu to enter the note status in the Status field.
9. Use the LOV to enter related objects in the Related To field.

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

29.3 Searching for Notes

To search for notes in the Notes form:

Prerequisites

None

Steps

1. Select **Actions > View Notes > OK**. The Notes form opens.
2. Select the Search icon in the toolbar. The Find Notes form opens.
3. Enter a value into one of the search fields.

You can search by:

- **Source Code:** The application/object from which the note was created. For example, **quote**
 - **Number:** The identifier of the object. For example, quote number
 - **Entered By:** Person who entered the note
 - **Entered Date:** Date range for when the note was entered
 - **Related To:** What the note is related to. For example, a quote or an opportunity
 - **Value:** Identifier of related objects. For example, an opportunity number
 - **Note Type:** Type of note
 - **Notes:** Contents of note
4. Select **Search**.

29.4 Creating an Attachment

There are five types of documents you can attach to a quote:

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

You can create attachments at the header or line level.

To create an attachment for a quote:

Prerequisites

- The Oracle Quoting form must display the quote to which you want to add an attachment.
- The user must save the quote before creating an attachment.
- To create attachments at the header level, place the cursor in a header field and follow the instructions below.

To create attachments at the line level, place the cursor in a line level field and follow the instructions below.

Steps

1. Select the paper clip icon in the tool bar. The Attachments form opens.
2. Use the LOV to select a Category.

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

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

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

- **Short Text**

- **Long Text**

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

- Enter the attachment text into the text form.
- Save your work.

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

- **File**

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

- Once you select either **Document Reference** or **File** as the Data Type, the Upload a File window displays.
- Select **Browse** to search for your file.
- Select a file.
- Select **OK** to apply the file as an attachment.

If the file uploaded successfully, you will see a confirmation message.

- Close the browser to return to the Attachments form.

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

- Select **Open Document** to view your attached file.
- Close the browser to return to the Attachments form.
- Save your work.

- **Web Page**

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

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

- Save your work.

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

29.5 Viewing an Attachment

To view a document attached to a quote:

Prerequisites

- The quote containing the attachment(s) you want to view must be displayed in the Oracle Quoting form.
- To view header attachments, place the cursor in a header level field.
To view line attachments, place the cursor in a line level field.

Steps

1. Select the paper clip icon. The Attachments form opens.
2. Highlight the attachment you want to view.
 - a. If the attachment is in the category short text or long text, the document appears in a text block at the bottom of the form.
 - b. If the document is a file, web page, or document reference, select **Open Document**.

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

29.6 Deleting an Attachment

When you delete an attachment, you remove the association between the attached document and the quote.

To remove an attachment from a quote:

Prerequisites

- The quote containing the attachment(s) you want to delete must be displayed in the Oracle Quoting form.
- To view header attachments, place the cursor in a header level field.
To view line attachments, place the cursor in a line level field.

Steps

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

29.7 Copying an Attachment from Another Quote

To copy an attachment from another quote:

Prerequisites

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

Steps

1. Select the paper clip icon. The Attachments form opens.
2. Select **Document Catalog**.
3. Enter the search criteria into the Find Existing Documents section.
You can search using the description, category, data type, attached to, file or URL, or usage.
4. Select **Find**. The window displays matching documents.
5. Select the box to the left of the document to display the attachment, or place your cursor in the attachment line and select **Preview**.
6. Close the browser to return to the Attachments form.
7. Select **Attach**.

The Attach button lists the number of attachments you are adding to your quote.

Applying Contracts to Quotes

This chapter covers contracts.

- [Overview of Contracts](#)
- [Creating a Quote with Non Default Terms and Conditions](#)

30.1 Overview of Contracts

The objective of Oracle Quoting/Contracts integration is to automate the creation and delivery of quotes with default or negotiated terms both on and off line.

Contracts integration into Quoting includes the following functionality:

- Automatic creation and delivery of quotes with default terms and conditions, without involving a contract administration team.
- Sales representatives can request the assistance of a contract specialist to create or modify non default terms.
- Print a quote with or without default or negotiated terms and conditions.
- Support contract integration during order placement and publishing.
- View contract reference, contract summary information, and terms and conditions from Quoting.

Contracts integration is controlled by the profile option **ASO: Enable Use Contracts**. If the profile is set to **No**, all menu options, buttons, and links related to Contracts integration are disabled.

Note: You cannot remove a contract once it is associated with a quote. You must change the status to *Contract Canceled*.

30.1.1 Quotes and Contract Versioning

If a quote has an existing contract, the contract will always be attached to the latest version of the quote.

Note: If you copy a quote with an attached contract to a new quote, the contract will not copy into the new quote. You cannot create a new version of a quote that has an attached contract.

30.1.2 Contracts Quote Statuses

The following quote statuses support Contracts Core integration. For more information on quote statuses, see [Chapter 20.1.2, "Quote Status"](#).

- *Contract Required* — A quote was approved but requires contract authoring. The sales representative can request contract creation from this status.
- *Contract Pending* — A contract is being authored by a contract specialist. This is a read only status.
- *Contract Canceled* — The contract was canceled by the contract specialist. This is a read only status.

30.2 Creating a Quote with Non Default Terms and Conditions

To create a contract with non default terms and conditions:

Prerequisites

- **ASO: Enable Use Contracts** must be set to **Yes** at the appropriate level.
- A contract administrator must be designated in **OKC: Default Contract Administrator for notifications**.
- There must be a transition from the current status to *Contract Pending*.
- There must not be a contract currently attached to the quote.
- The Pricing and Tax status must be **Complete**.

Steps

1. Select **Actions > Contract > OK**. The Contract Detail Information page opens.
2. Use the LOV to select a contract template.

3. Select the **Request contract creation if you need to negotiate terms and conditions** radio button.
4. Enter comments in the text box and select **OK**.

The quote number is displayed and a notification is sent to the Contracts Administrator. The quote is now read-only in *Contract Pending* status.

30.3 Viewing a Quote's Terms and Conditions

Steps

1. Select **Actions > Contract > OK**. The Contract Detail Information page opens.
2. Select **Review Terms and Conditions**. The Terms and Conditions display.
3. Select **Done** to return to the Contract Detail Information page.

Publishing and Printing

This section contains the processes and procedures necessary to print and publish quotes in Oracle Quoting.

- [Overview of Printing](#)
- [Printing a Quote](#)
- [Overview of Publishing Quotes](#)
- [Web Publishing a Quote](#)

31.1 Overview of Printing

The ability to print a quote allows you to offer customers hard copies of quotes created in the Oracle Quoting UI.

The print outs for Print Quote vary depending on whether or not the quote is *executable*. A quote is *executable* if there is a valid transition from the current quote status to *Order Submitted* status. The non-executable Print Quote report displays a customizable disclaimer in addition to the following key information:

- Quote information — Quote number, revision, date, expiration date, header level payment term
- Customer information — Customer name, address, email address, and phone number; ship-to customer name, address, and phone number; bill to customer name, address, and phone number
- Pricing Agreement information — Agreement name, number, revision, and revision date
- Line information — Product number and description, UOM, Qty, Unit Net Price, Total Net Price, Sales Tax, Configurations for model products, Total price for model products
- Attachments — Text type header attachments that are associated with the document category **Miscellaneous**
- Charges — Quote line level charges, quote header level charges, and a summary of charges for entire quote

The following sections are added if the quote is executable:

- Contract Information — Terms and Conditions for a contract associated with the quote

Note: Contract information is only available on the Print Quote report if Contracts integration is enabled.

- Signature block

There are templates available from which you can choose the print quote layout. The seeded option is **Default Print Layout**. You can also choose to generate the output in either Adobe PDF format or Rich Text Format (RTF). Oracle Quoting uses Oracle Reports *6i* to produce the Print Quote report.

31.2 Printing a Quote

To print a quote:

Prerequisites

- The highest version of the quote must be used.
- The quote must be saved.
- The Pricing status must be **Complete**.
- The Tax status must be **Complete**.
- The quote must not be submitted for batch pricing.

Steps

1. Select **Actions > Print Quote > OK**. The Printing page displays.
2. Select the Output format and template from the drop-down menus.
3. Select the checkbox(s) to:
 - Show subtotal by product category
 - Show Price Adjustments
 - Show Header Attachments (Text type only)
 - Show Line Attachments (Text type only)
 - Show Charges
 - Print in executable mode (This option will not appear if the quote is not executable)
4. Select **Submit**.

Depending on your browser, either a browser window opens displaying the printout or you are asked to open or save the printout.
5. If you need a paper copy of the quote, choose your browser's Print option to print the report.

31.3 Overview of Publishing Quotes

Sales representatives can share quotes with customers by web publishing the quotes. A quote version may be web published if it meets all of the following conditions:

- The user has update access to the quote.
- The highest version of the quote must be used.
- The quote is not in *Order Submitted* or *Inactive* status.
- The quote is not expired.
- **ASO: Enable Web Publishing** is set to **Yes**.
- If the quote-to customer is of type **Organization**, a quote-to contact has been specified.
- There is at least one specialty store in which the quote can be web published.
- The quote must not already be web published.
- The quote must not be submitted for batch pricing.
- The pricing and tax statuses must both be **Complete**.
- The quote name must be specified.

Note: If a web published quote does not meet all of the criteria above, the Publish flag will indicate that it is web published, but it will not show up in the customer UI.

If the quote-to customer is of type **Person**, the sales representative publishes the quote directly to the quote-to customer. If the quote-to customer is of type **Organization**, the sales representative publishes the quote to the quote-to contact. A quote version can only be published to an FND_USER. Oracle Quoting will verify that the quote-to customer/contact is an FND_USER. If the customer is not an FND_USER, the sales representative can create an FND_USER for the customer.

31.4 Web Publishing a Quote

To web publish a quote:

Prerequisites

- **ASO: Enable Web Publishing** must be set to **Yes** at the appropriate level.
- You must have update access to the quote.
- The highest version of the quote must be used.
- The quote is not in *Order Submitted* or *Inactive* status.

- The quote is not expired.
- If the quote-to customer is of type **Organization**, a quote-to contact has been specified.
- There is at least one specialty store to which the quote can be web published.
- The quote must not already be web published.
- The quote must not be submitted for batch pricing.
- The Pricing and Tax statuses must be **Complete**.
- The quote name must be specified.

Steps

1. Select **Actions > Web Publish** and select **OK**. The Publish page opens.
2. If the customer is not an FND_USER, you will be prompted to enter a User Name. The system auto generates a password and creates an FND_USER for the customer. This information is then emailed to the customer.
3. Select the store the quote will be published to.
4. Enter the email address for the user.
5. Optionally, enter comments and select **Submit**.
6. Upon returning to the main Quoting form, you are asked if the quote was published successfully. Select **OK** to continue. A note appears confirming publication.

31.4.1 Unpublishing a Quote

To unpublish a previously published quote:

Prerequisites

- **ASO: Enable Web Publishing** must be set to **Yes** at the appropriate level.
- The quote must currently be web published.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote is not in *Order Submitted* or *Inactive* status.
- The quote is not expired.

- The quote is not submitted for batch pricing.

Steps

1. Select **Actions > Web Unpublish > OK**.

A note appears confirming that the quote was unpublished.

Enabling Quoting Security

This chapter outlines the procedures necessary to enable and use Oracle Quoting Security.

- [Overview of Security](#)
- [Adding a Resource to the Quote Sales Team](#)
- [Changing the Primary Sales Agent](#)

32.1 Overview of Security

Quoting Security has three essential components:

- Quote Access Security
- Quote Function Security
- New Quote Security

Quote Access Security

Quote Access Security designates which quotes are available to the user. Users should have access only to quotes for the sales team that both the user and the user's subordinates belong to.

Quote Access Security also determines whether the user has update or view-only access to quotes.

Quote Function Security

Quote Function Security determines whether or not there are user restrictions on particular quote functions. For example, a user may be restricted from placing orders. This security is controlled by profile options and/or the permissions assigned to a user or responsibility.

New Quote Security

New Quote Security determines if users can create new standalone quotes and for which customers.

Primary Sales Agent

The Primary Sales Agent for a quote has quote ownership responsibility. This is not necessarily the same individual who creates the quote. If the quote creator meets the Primary Sales Agent criteria, the quote creator will default as the Primary Sales Agent. If the quote creator does not meet the criteria, the sales representative selected in the profile option **ASO: Default Salesrep** will default as the primary sales agent. For more information on Primary Sales Agents, see the *Oracle Quoting Implementation Guide*.

In order to be a Primary Sales Agent, the user must:

- Be a valid resource, set up in Resource Manager
- Be set up as a sales representative

Note: A primary sales agent is required on a quote. The user cannot save or submit a quote without one.

32.1.1 Quote Access Security

Quote Access Security is controlled by the profile options **ASO: Enable Security Check**. When the profile is disabled, users have access to all quotes. When it is enabled, quote access is restricted based on:

- Quote Availability Security — Restricts the quotes available to users based on hierarchy and sales teams
- Quote Data Security — Determines if users have update access or view-only access to quotes

32.1.1.1 Quote Availability Security

Quote availability security restricts the quotes available to each user. A user must be set up as a valid resource in order to view quotes when security is enabled. If the user is a valid resource, all quotes where the user is on the quote sales team are available. This includes all quotes created by the user and, by other users on the quote sales team.

If the user is also a manager, the following quotes are available:

- All quotes where the user is on the quote sales team
- All quotes where the user's subordinates are on the quote sales team

32.1.1.2 Quote Data Security

Once it is determined what quotes are available to a user, Quote Data Security determines whether the user has update access to these quotes. The Full Access flag, located next to each resource on the Sales Team tab, designates the level of access. If the Flag is selected, the user has full update access to quotes. If the flag is not selected, the resource has view-only access.

If a user has update access to a quote, the user can modify any quote field and perform any function that is not restricted by other Quoting requirements. If the quote is changed to a read-only status, the user may only update the payment information and other fields that are updateable in read-only statuses.

If a user has view-only access to a quote, the user cannot modify fields or perform any function on the quote. When a quote is changed to a read-only status, the user cannot update payment information or other updateable fields.

Manager Access

Whether or not managers can access quotes for the sales team their subordinates belong to is controlled by the profile option **ASO: Manager Role Access**. If the profile is set to **Update**, the manager can update all quotes for their subordinates' sales teams. If the profile is set to **Inherit**, the manager has the same access level as the subordinate. If the profile is set to **Inherit** and the manager has more than one subordinate on the team with different access levels, the manager should inherit the highest access level.

32.1.2 Quote Function Security

Quote function security determines which actions a user with update access can perform on a quote. Profile options and permissions restrict the following functionality and allow the user to:

- **Override a quote status** — The value of profile option **ASO: Status Override** controls a user's ability to update a quote when it is in a read-only status. This will ensure that the user can override quote data if a mistake was made prior to transitioning the quote to a read-only status.
- **Override the price list** — The value of profile option **ASO: Price List Override** controls a user's ability to change the selected price list for a quote. This functionality ensures that a user does not inadvertently quote an inaccurate price based on an incorrect price list selection.
- **Create new customers** — The value of profile option **ASO: Create New Customer** controls a user's ability to create new customer information. This functionality ensures that customers wishing to protect the integrity of customer data can restrict the creation of new customers to a limited number of users.
- **Update customer information** — The value of profile option **ASO: Update Customer** controls a user's ability to update existing customer information.
- **Update sales team information** — The value of profile option **ASO: Update Sales Team** controls a user's ability to manually update sales team information, including manual assignment of the primary sales agent.

For more information on the Quote Function Security profile options, see the *Oracle Quoting Implementation Guide*.

32.1.3 New Quote Security

New Quote Security restricts the parties for which a sales agent can create quotes. New Quote Security is governed by the profile option **ASO: New Quote Security**. If set to **Yes**, a user cannot create new standalone quotes. This includes copying existing quotes to new quotes.

Note: Setting this profile to **Yes** does not restrict a user's ability to create quotes from opportunities.

If this profile is set to **No**, the user can create quotes for all customers. If the profile option is set to **Sales Team**, the user must be on the account sales team in order to select that customer in the quote header.

Note: When Oracle Quoting is integrated with Oracle TeleSales, account sales team information is collected from Oracle TeleSales.

32.2 Adding a Resource to the Quote Sales Team

You can add resources to the quote sales team, if you have **ASO: Update Sales Team** set to **Yes** at the appropriate level.

Note: The Keep Flag is not supported in this release.

Use the following procedure to add a resource to the quote sales team.

Prerequisites

- The profile **ASO: Update Sales Team** must be set to **Yes** at the appropriate level.

Steps

1. Select **Actions > Sales Team > OK**.

The Primary Sales Agent is automatically populated in this form. See [Section , "Primary Sales Agent"](#) for more information.

2. Use the Name LOV in the first open line to select a resource.
3. Optionally, use the Group LOV to select a sales group.

4. Optionally, select the Full Access flag if you want the sales team member to have update access to the quote.
5. Save the quote.

32.3 Changing the Primary Sales Agent

To assign a new primary sales agent:

Prerequisites

- **ASO: Update Sales Team** must be set to **Yes** at the appropriate level.
- The person that you want to act as the Primary Sales Agent must be set up as a valid resource and as a sales representative.

Steps

1. In the quote header, use the Salesperson LOV to select a new primary sales agent.
2. Save the quote.

The new primary sales agent shows up in the Sales Team form with the Primary flag checked.

Placing Orders

This section contains information about submitting orders to Oracle Order Management.

- [Overview of Placing Orders](#)
- [Placing an Order](#)

33.1 Overview of Placing Orders

When you place an order in Oracle Quoting, the quote is converted into an order using Oracle Order Management.

33.2 Placing an Order

To convert a quote into an order:

Prerequisites

- There must be a valid transition from the current quote status to *Order Submitted*.
- **ASO: Enable Submit Button** must be set to **Yes** at the appropriate level.
- The user must have update access to the quote
- The highest version of the quote must be used
- The quote must not be in *Order Submitted* status
- The quote must not be submitted for batch pricing.
- There is at least one line in the quote.
- The quote is not expired.
- The Pricing and Tax statuses must be **Complete**.

Steps

1. If you are creating an order from a quote, display the quote in the Oracle Quoting form.
2. Add products to the quote, if necessary. See [Section 26.2, "Adding Products to the Quote"](#) for instructions.
3. Adjust discounts. This is an optional step. It is only necessary if there is a discount you wish to apply to the order. See [Chapter 23, "Pricing Products and Quotes"](#).
4. If the bill-to information has not been entered, enter it. See [Section 25.3, "Entering Billing Information"](#) for instructions.
5. If the ship-to information has not been entered, enter it. See [Section 25.4, "Entering Shipping Information"](#) for instructions.

6. If the payment information has not been entered, then enter it. See [Section 25.10, "Entering Header Payment Information"](#) for instructions.

7. Select **Place Order**.

Your order is submitted to Oracle Order Management and you receive a confirmation number. You can then track the order in Order Management.

The order confirmation displays:

- Order Number
- Order Total
- Shipping Method
- Currency
- Ship-To Customer
- Ship-To Account
- Ship-To Contact
- Ship-To Address

Part IV

Appendixes

This part contains the following Appendixes:

- [Appendix A, "Oracle Quoting HTML User Interface Reference"](#)
- [Appendix B, "Oracle Quoting Forms User Interface Reference"](#):

A

Oracle Quoting HTML User Interface Reference

This appendix describes each window or page in the application, including tasks you can perform, and an explanation of the components. Sections in this appendix include:

- [Common Elements](#)
- [Quotes Page](#)
- [Advanced Search Page](#)
- [Saved Searches Page](#)
- [Create Saved Search Page](#)
- [Templates Page](#)
- [Update Template Page](#)
- [Template Detail](#)
- [Create Template Page](#)
- [Create Quote Page](#)
- [Search and Select: Customer Page](#)
- [Create Customer Page](#)
- [Search and Select: Contact](#)
- [Create Contact Page](#)
- [Search and Select: Address](#)
- [Create Address Page](#)

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- Search and Select: Person
 - Search and Select: Source Name Page
 - Search and Select: Sales Group Page
 - Quote Overview Page
 - Charge Summary Page
 - Overview Sidebar
 - Price Quote Page
 - Pricing Request Details Page
 - Print Quote Page
 - Publish Page
 - General Page
 - Search and Select: Opportunity Page
 - Lines Page
 - Product Details Page
 - Charges Details
 - Pricing Details Page
 - Specify Service Reference
 - Search and Select: Product
 - Search and Select: Installed Base Product
 - Search and Select: Extended Attributes
 - Installed Base Relationships Page
 - Installed Base Product Details
 - Availability Information Page
 - Select: Service Page
 - Modify Service Page
 - Search and Select: Related Products Page
 - Adjust Pricing Page
 - Assign Sales Credits Page

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- [Configure Page](#)
 - [Modify Shipping and Billing Page](#)
 - [Split Line Page](#)
 - [Pricing Page](#)
 - [Search and Select: Promotion Code Page](#)
 - [Shipping and Billing Page](#)
 - [Sales Team Page](#)
 - [Sales Credit Page](#)
 - [Proposals Page](#)
 - [Approvals Page](#)
 - [Initiate Approval Page](#)
 - [Approval Detail Page](#)
 - [Approver Notification Detail Page](#)
 - [Approver Comments Page](#)
 - [Contracts Page](#)
 - [Request Contract Creation Page](#)
 - [Contract Details](#)
 - [Contract Terms and Conditions Page](#)
 - [Tasks Page](#)
 - [Sales Supplement Page](#)
 - [Notes Page](#)
 - [Attachments Page](#)
 - [Add Attachments Page](#)
 - [Versions Page](#)
 - [Order Details Page](#)

A.1 Common Elements

The following table lists and describes the common user interface components in the application.

Table A-1 Common Elements Page Components

| Component | Type | Description |
|---------------------------|-----------------|---|
| Quotes | Tab | Accesses the Quotes Page |
| Templates | Tab | Accesses the Templates Page |
| Quote Name | Hyperlink | Accesses the Overview page for the quote. |
| Quote Number | Read-only field | Displays quote number and version number. |
| Customer Name | Read-only field | Displays customer name. Linked to opportunity if integrated with Oracle Sales Online. |
| Account Number | Read-only field | Displays account number. Linked to opportunity if integrated with Oracle Sales Online. |
| Contact Name | Read-only field | Displays contact associated with the Quote To customer. Blank if the Quote To customer is of type Person. |
| Opportunity Name | Read-only field | Displays opportunity name. Linked to opportunity if integrated with Oracle Sales Online. |
| Pricing Status | Read-only field | Displays the status for pricing calculations on the quote. |
| Tax Status | Read-only field | Displays the status for tax calculations on the quote. |
| Number | Read-only field | Displays product number. |
| Description | Read-only field | Displays product description. |
| UOM | Read-only field | Displays product UOM. |
| Quantity | Read-only field | Displays product quantity. |
| Sub-Total (List Price) | Read-only field | Displays the sub-total of list prices. |
| Sub-Total (Selling Price) | Read-only field | Displays the sub-total of selling prices. |
| Cancel | Button | Nullifies transaction. |
| Apply | Button | Applies changes. |
| Delete | Button | Deletes selected line or product. |

Table A-1 Common Elements Page Components

| Component | Type | Description |
|-----------|----------------|--|
| Go | Button | Executes search. |
| Sign Out | Icon | Accesses the login page. |
| Help | Icon | Accesses online help for the application. |
| Actions | Drop-down menu | Listed value selections allow you to carry out actions for an individual line. |
| Previous | Link | Accesses previous page of display. |
| Next | Link | Advances to next page of display. |
| Revert | Button | Reverts product back to original, saved state in database. |

A.2 Quotes Page

The Quotes page is the landing page in the application.

The following table describes the user interface components on the Quotes page.

Table A-2 Quotes Page Components

| Component | Type | Description |
|---------------------|-----------------|---|
| Create Quote | Button | Access the Create Quotes page and starts the Create Quote flow. |
| Results | Section | Section listing Quote information details. |
| Select quote and... | Prompt | Identifies action to be takes after selection. |
| Duplicate | Button | Creates new Quote based on selected Quote attributes. |
| Previous | Drop-down menu | Displays next page listing of Quotes. |
| Next | Link | Advances to the next page of Quote display. |
| Select | Radio button | Selects the quote from which a duplicate is to be made. |
| Quote Name | Hyperlink | Accesses the Overview page with Quote details. |
| Quote Number | Read-only field | Displays the quote number. |

Table A-2 Quotes Page Components

| Component | Type | Description |
|------------------|---------------------------|---|
| Opportunity Name | Read-only field/Hyperlink | Displays Opportunity Name. Links to Opportunity Detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Customer Name | Read-only field/Hyperlink | Displays Customer Name. Links to Customer details if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Account Number | Read-only field/Hyperlink | Displays Account Number. Links to account details if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Contact Name | Read-only field/Hyperlink | Displays Contact Name. Links to contact detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Status | Read-only field | Indicates the current stage of preparation for a specific quote. |
| Web Published | Read-only field | Flag to indicate if quote is published. Only appears if ASO: Enable Web Publishing is set to Yes at the appropriate level. |
| Expiration Date | Read-only field | Displays expiration date. |
| Amount | Read-only field | Total quote amount, inclusive of all charges and taxes. |
| Order Detail | Hyperlink | Displays the order details for the quote. Only appears if quote status is <i>Order Submitted</i> . |
| Quote Search | Bin | Search bin. |
| Quote Name | Text field | Enter Quote Name or partial value for search. |
| Quote Number | Text field | Enter Quote Number or partial value for search. |
| Customer Name | Text field | Enter Customer Name or partial value for search. |
| Account Number | Text field | Enter Account Number or partial value for search. |
| Contact Name | Text field | Enter Contact Name or partial value for search. |
| Go | Button | See Section A.1, "Common Elements" |

Table A–2 Quotes Page Components

| Component | Type | Description |
|-----------------|----------------|---|
| Advanced Search | Hyperlink | Accesses the Advanced Search page. |
| Saved Searches | Bin | Search bin for Saved Searches |
| Saved Searches | Drop-down menu | Lists all saved searches. Defaults to default saved searches. |
| Go | Button | Displays search results |
| Personalize | Button | Accesses page that lists all saved searches. |

See Also:

- [Section 5.1, "Overview of Searching for Quotes"](#)
- [Section 5.2, "Basic Search for Quotes"](#)
- [Section 5.3, "Advanced Search for Quotes"](#)

A.3 Advanced Search Page

Use the Advanced Search page to search for existing quotes.

The following table describes the user interface components on the Advanced Search page.

Table A–3 Advanced Search Page Components

| Component | Type | Description |
|----------------------|-------------|---|
| Save Search Criteria | Button | Displays the Create Saved Search page. |
| Create Quote | Button | Displays the Create Quote page. |
| Advanced Search | Section | Section listing the Advanced Search parameters. |
| Basic Information | Sub-section | Sub-section listing the basic elements of the Advanced Search parameters. |
| Quote Name | Text field | Enter the quote name for which you want to search. |
| Quote Number | Text field | Enter the quote number for which you want to search. |

Table A-3 Advanced Search Page Components

| Component | Type | Description |
|-------------------|--------------------------|--|
| Customer Name | Text field | Enter the customer name for which you want to search. |
| Customer Type | Drop-down menu | Select customer type. Values are either Organization or Person. |
| Account Number | Text field | Enter the account number for which you want to search. |
| Contact Name | Text field | Enter the quote-to contact name. |
| Opportunity Name | Text field | Enter the opportunity name, if the quote was created from an opportunity. |
| Quote Amount | Text field | Restricts search by quote amount range. |
| From | Text field | Starting point of quote amount range |
| To | Text field | Ending point of quote amount range |
| Currency | Drop-down menu | Select a currency. Values are Null (Default) and all currencies. |
| Creation Date | Text field/Calendar icon | Restricts search criteria by date range. Use Calendar icon tool for range determination. |
| Status | Drop-down menu | Select a status. Values are All (Default) and all statuses. |
| Update Date | Text field/Calendar icon | Restricts search criteria by update date range. Uses Calendar icon tool for range determination. |
| Web Published | Drop-down menu | Indicates if the quote has been published to the web. Either Null, Yes, or No. Appears only if ASO: Enable Web Publishing is set to Yes at the appropriate level. |
| Expiration Date | Text field/Calendar icon | Restricts search by expiration date range. |
| Sales Information | Sub-section | Sub-section listing the basic elements of Sales Information. |
| Salesperson | Text field | Displays the Salesperson's name. Default is logged in user. |

Table A-3 Advanced Search Page Components

| Component | Type | Description |
|---|---------------------------|--|
| Go | Button | Accesses the Search and Select: Person page. |
| Sales Group | LOV field | Select a sales group. LOV searches all Sales Groups. |
| Go | Button | Accesses the Search and Select: Sales Group page. |
| Restrict to Primary Salesperson and Primary Sales Group | Checkbox | Checking this box restricts search to primary Salespersons and/or primary Sales Group. |
| Sales Channel | Drop-down menu | Select a sales channel. Values are All (Default) and all Sales Channels. |
| Source Name | Text field | Enter a Source Name |
| Go | Button | Accesses the Create Saved Search page |
| Results | Section | Section listing Search results details. |
| Quote Name | Hyperlink | Links to the Quote Overview page. |
| Quote Number | Read-only field text | Displays Quote Number |
| Opportunity Name | Read-only field/Hyperlink | Displays Opportunity Name. Links to the Opportunity Detail if created from an opportunity. |
| Customer Name | Read-only field/Hyperlink | Displays Customer Name. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Account Number | Read-only field/Hyperlink | Displays Account Number. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Contact Name | Read-only field/Hyperlink | Displays Contact Name. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Status | Read-only field | Displays Quote Status |
| Web Published | Read-only field | Flag to indicate if quote is published. Values are Yes and No. Only appears if ASO: Enable Web Publishing is set to Yes at the appropriate level. |

Table A-3 Advanced Search Page Components

| Component | Type | Description |
|-----------------|-----------------|---|
| Expiration Date | Read-only field | Displays Expiration Date. |
| Amount | Read-only field | Displays total quote amount, inclusive of all charges and taxes. |
| Order Detail | Hyperlink | Links to order detail page, if quote was converted into an order. |

See Also:

- [Section 5.3, "Advanced Search for Quotes"](#)

A.4 Saved Searches Page

The following table lists and describes the user interface components on the Saved Searches page.

Table A-4 Saved Searches Page Components

| Component | Type | Description |
|----------------------------|--------------------|--|
| Create Saved Search | Button | Accesses the Create Saved Search page. |
| Select saved search and... | Instructional text | Identifies the action to be taken after selecting a saved search. |
| Duplicate | Button | Copies the selected saved search and then accesses the Create Saved Search page. |
| Delete | Button | Deletes the selected saved search. |
| Previous | Hyperlink | See Section A.1, "Common Elements" |
| Next | Hyperlink | See Section A.1, "Common Elements" |
| Select | Radio Button | Identifies the saved search on which the action will be performed. |
| Name | Hyperlink | Links to the Update Saved Searches page. |
| Description | Read-only field | Displays saved search description. |

See Also:

- [Section 5.4, "Saved Searches"](#)
- [Section 5.4.1, "Creating a Saved Search"](#)

A.5 Create Saved Search Page

Use the Create Saved Search Page to create saved searches.

The following table lists and describes the user interface components on the Create Saved Search page.

Table A-5 Create Saved Search Page Components

| Component | Type | Description |
|-------------------|----------------|--|
| Cancel | Button | See Section A.1, "Common Elements" |
| Apply | Button | Saves the search and then accesses the Saved Searches page. |
| Apply and View | Button | Saves and applies the search. Accesses the default view with the current search in the Saved Searches LOV. |
| Query Properties | Section | Section listing search parameters for creating a Saved Search. |
| Basic Information | Section | Displays basic information about the quote. |
| Quote Name | Text field | Enter quote name. |
| Quote Number | Text field | Enter quote number |
| Customer Name | Text field | Enter Customer Name. |
| Customer Type | Drop-down menu | Select Customer Type. Values are Null (Default), Organization, and Person. |
| Account Number | Text field | Enter account number. |
| Contact Name | Text field | Enter contact name. |
| Opportunity Name | Text field | Enter opportunity name. |
| Quote Amount | Prompt | Restricts search by quote amount range. |

Table A-5 Create Saved Search Page Components

| Component | Type | Description |
|-------------------|--------------------------|--|
| From | Text field | Starting point of quote amount range. |
| To | Text field | Ending point of quote amount range. |
| Status | Drop-down menu. | Select from list of indicators for the current stage of preparation for a specific quote. |
| Creation Date | Text field/Calendar icon | Restricts search by date range. |
| From | Text field | Starting point of creation date range. Set using the calendar icon tool. |
| To | Text field | Ending point of creation date range. Set using the calendar icon tool. |
| Update Date | Text field/Calendar icon | Restricts search by update date. |
| From | Text field | Starting point of search. Set by calendar icon tool. |
| To | Text field | Ending point of search. Set by calendar icon tool. |
| Web Published | Drop-down menu | See Section A.1, "Common Elements" |
| Expiration Date | Text field/Calendar icon | Restricts search by expiration date. |
| From | Text field | Starting point of search. Set by calendar icon tool. |
| To | Text field | Ending point of search. Set by calendar icon tool. |
| Sales Information | Subsection | Subsection listing sales information |
| Salesperson | Text field | Select a primary salesperson. Displays the logged in user by default. |
| Go | Button | Accesses the Search and Select: Person page. |
| Sales Group | LOV field | Enter either sales group name or partial value. Accesses the Search and Select: Sales Group page. LOV displays all sales groups. |
| Go | Button | Accesses the Search and Select: Sales Group page. |

Table A-5 Create Saved Search Page Components

| Component | Type | Description |
|--|-------------------------|--|
| Restricts to Primary Salesperson and Primary Sales Group | Checkbox | Restricts search to primary salesperson and/or primary sales group. |
| Sales Channel | Drop-down menu | Select a sales channel. Values are All (Default) and all sales channels. |
| Source Name | Textfield/LOV field | Select a source name. |
| Go | Button | Accesses the Search and Select: Source Name page. |
| Column Properties | Section | Section listing Available Columns, Displayed Columns, and Sort Settings. |
| Available Columns | Multi-Select LOV | Lists all available columns to choose from. |
| Move | Arrow icon right | Moves selected product to Displayed Columns |
| Move All | Double Arrow icon right | Moves all products to Displayed Columns |
| Remove | Arrow icon left | Moves selected products to Available Columns |
| Remove All | Double Arrow icon left | Moves all products to Available Columns. |
| Displayed Columns | Multi-Select LOV | Lists columns chosen for display. |
| Sort Settings | Subsection | Subsection listing sort settings parameters |
| First Sort | Drop-down menu | Selects first sort order criteria. Default value is Quote Name. |
| Sort Order | Drop-down menu | Select sort order criteria. Values are Ascending and Descending. |
| Second Sort | Drop-down menu | Selects second sort order criteria. Default value is Quote Name. |
| Sort Order | Drop-down menu | Select sort order criteria. Values are Ascending and Descending. |
| Third Sort | Drop-down menu | Selects third sort order criteria. Default value is Quote Name. |

Table A-5 Create Saved Search Page Components

| Component | Type | Description |
|-----------------------------|----------------|--|
| Sort Order | Drop-down menu | Select sort order criteria. Values are Ascending and Descending. |
| General Properties | Section | Section displaying saved search properties |
| Saved Search Name | Text field | Displays saved search name. Read Only for existing quote. Mandatory field. |
| Use as Default Saved Search | Checkbox | Saves search as default display if checked. |
| Number of Rows Displayed | Drop-down menu | User chooses from values listed. Values are 5, 10, 15 (Default), 20, and 25. |
| Description | Text field | Enter description of search. |

See Also:

- [Section 5.4, "Saved Searches"](#)
- [Section 5.4.1, "Creating a Saved Search"](#)
- [Section 5.4.2, "Viewing a Saved Search"](#)
- [Section 5.4.3, "Modifying a Saved Search"](#)

A.6 Templates Page

The following table lists and describes the user interface components on the Templates page.

Table A-6 *Template Page Components*

| Component | Type | Description |
|------------------------|-------------------|---|
| Create Template | Button | Accesses the Create Template page. Only appears if ASO: Manage Quote Templates is set to Yes at the appropriate level. |
| Search | Section | Section for template search functionality. |
| Template | LOV field/Textbox | Choose type for restricting template search, either Name (default) or Description and enter a value in the textbox. |
| Go | Button | See Section A.1, "Common Elements" . |
| Results | Section | Section listing template search results details. |
| Select Template and... | Subsection | Section containing options for template tasks. |
| Delete | Button | Deletes the selected template. Only appears if ASO: Manage Quote Templates is set to Yes at the appropriate level. |
| Create Quote | Button | Creates quote from selected template. Only appears if ASO: Manage Quote Templates is set to Yes at the appropriate level. |
| Select | Checkbox | Identifies the row(s) to be deleted/used for quote creation. Disappears if ASO: New Quote Security is set to Yes at the appropriate level. |
| Name | Hyperlink | Linked template name accesses Template Detail. |
| Description | Read-only field | Description of template. |

See Also:

- [Section 4.2, "Creating a Template"](#)
- [Section 4.3, "Creating a Quote From a Template"](#)

A.7 Update Template Page

Use the Template Update page to access and modify templates.

The following table lists and describes the user interface components of the Template Update page.

Table A-7 Update Template Page Components

| Component | Type | Description |
|--------------------|-----------------|---|
| Basic Information | Section | Section listing basic template information. |
| Template Name | Text field | Displays template name. Optionally, change the template name. Mandatory field. |
| Description | Text field | Displays template description |
| Lines | Section | Section listing products. |
| Add Product | Button | Accesses the product search page. |
| Select Line and... | Prompt | Identifies action to be taken after selecting line. |
| Add Services | Menu option | Accesses the Select: Service page. |
| Configure | Menu option | Launches Configurator for the selected line. |
| Duplicate Line | Menu option | Duplicates the selected line. |
| Remove Line | Menu option | Removes the selected line. |
| Modify Service | Menu option | Accesses the Modify Service page. |
| Select | Radio Button | Selects line. |
| Line | Read-only field | Displays line number |
| Product | Read-only field | Displays the product part number. |
| Description | Hyperlink | Description of template. Link accesses Product Details page. |
| UOM | Read-only field | Unit of Measurement |
| Quantity | Text field | Enter quantity in numeric format. Field is read only if the product is a service. |

Table A-7 Update Template Page Components

| Component | Type | Description |
|-----------|--------|--|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |

See Also:

- [Section 4.4, "Modifying a Template"](#)

A.8 Template Detail

Use the Template Detail page to view template details. This page appears if **ASO: Manage Quote Templates** is set to **No** at the appropriate level.

The following table lists and describes the user interface components on the Template Detail page.

Table A-8 Template Detail Page Components

| Component | Type | Description |
|-------------------|-----------------|--|
| Basic Information | Section | Section listing basic template information. |
| Template Name | Text field | Displays template name. |
| Description | Text field | Displays template description |
| Lines | Section | Section listing products. |
| Line | Read-only field | Displays the line number. |
| Product | Read-only field | Displays the product part number. |
| Description | Hyperlink | Description of the product. Link accesses the Product Details page. |
| UOM | Read-only field | Displays the product unit of measurement |
| Quantity | Read-only field | Displays the product quantity. |
| Done | Button | See Section A.1, "Common Elements" |
| Create Quote | Button | Accesses the Create Quote page. Disappears if ASO: New Quote Security is set to Yes at the appropriate level. |

A.9 Create Template Page

Use the Create Template page to create templates.

The following table lists and describes the user interface components on the Create Template page.

Table A-9 Create Template Page Components

| Component | Type | Description |
|-------------------|------------|--|
| Cancel | Button | See Section A.1, "Common Elements" |
| Apply | Button | Creates the template and continues to the Template Details page. |
| Basic Information | Section | Section listing the Template Name and Description |
| Template Name | Text field | Enter a template name. Mandatory field. |
| Description | Text field | Enter a template description. |

See Also:

- [Section 4.2, "Creating a Template"](#)
- [Section 4.3, "Creating a Quote From a Template"](#)

A.10 Create Quote Page

Use the Create Quote Page to create quotes.

The following table describes the user interface components on the Create Quotes page.

Table A-10 Create Quote Page Components

| Component | Type | Description |
|---------------------|---------------------------|---|
| Cancel | Button | Nullifies transaction and takes user back to the prior page. |
| Apply | Button | Creates quote and takes user to the Lines page for the new quote. |
| General Information | Section | Lists the basic elements of the Create Quote page. |
| Quote Name | Text field | Enter a quote name. This is a mandatory field. |
| Customer Name | LOV text field | Select the Customer Name. Mandatory field. |
| Go | Button | Accesses the Search and Select: Customer Page. |
| Account Number | LOV text field | Enter the account number. |
| Go | Button | Accesses the Search and Select: Customer Page. |
| Contact Name | LOV text field | Select the Contact Name |
| Go | Button | Accesses the Search and Select: Customer Page. |
| Opportunity Name | Read-only field/Hyperlink | Displays Opportunity Name. Links to Oracle Sales Online if created from an opportunity and if ASO: Enable OSO Integration is set to Yes at the appropriate level. |

Table A-10 Create Quote Page Components

| Component | Type | Description |
|------------------|--------------------------|---|
| Address | Text field | <p>Optionally, enter a different address.</p> <p>This field is populated with an active address based on the following conditions (only at the time of quote creation):</p> <p>If the Quote-To Customer is an Organization and a Quote-To Contact is specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:</p> <ul style="list-style-type: none"> ■ Primary Sold-To address type usage for the Quote-To Contact ■ Identifying address for the Quote-To Contact ■ Primary Sold-To address type usage for Quote-To Customer ■ Identifying address for the Quote-To Customer <p>If the Quote-To Customer is an Organization and a Quote-To Contact is not specified, the application searches for a value from the following sources (in that order) and accepts the first one it finds:</p> <ul style="list-style-type: none"> ■ Primary Sold-To address type usage for the Quote-To Customer ■ Identifying address for the Quote-To Customer <p>If the Quote-To Customer is a Person, the application searches for a value from the following sources (in that order) and accepts the first one it finds:</p> <ul style="list-style-type: none"> ■ Primary Sold-To address type usage for the Quote-To Customer ■ Identifying address for the Quote-To Customer |
| Go | Button | Accesses the Search and Select Address page. |
| Expiration Date | Text field/Calendar icon | Displays the expiration date. Set by Calendar icon. Mandatory field. |
| Status | Read-only field text | Indicates the current stage of preparation for the quote. |

Table A-10 Create Quote Page Components

| Component | Type | Description |
|---------------------|----------------|---|
| Primary Salesperson | LOV text field | Defaults to the user if the user is set up as a salesperson for the current operating unit. If not, defaults to resource designated in the profile ASO: Default Salesrep . Appears as read-only if ASO: Update Sales Team is set to No at the appropriate level. Mandatory field. |
| Go | Button | Accesses the Search and Select: Person page. |
| Primary Sales Group | Drop-down menu | Default is the logged in user as specified in OSO: Default Sales Group and Role . Values are Null and all Sales Groups. Appears as Read Only if ASO: Update Sales Team is set to No at the appropriate level. |
| Sales Channel | Drop-down menu | Defaults to value specified in ASO: Default Sales Channel at the appropriate level. Values are Null and all Sales Channels. |
| Source Name | LOV text field | Lists the various types of marketing sources that are set up in Marketing Online. Can be specified for a quote created directly or can be copied over when a quote is created from an opportunity. |
| Go | Button | Displays the Search and Select: Source Name page so that user may search for source name by either name or code. |
| Order Type | Drop-down menu | Select Order Type. Defaults to value specified in ASO: Default Order Type at the appropriate level. |
| Agreement | Drop-down menu | Select pricing agreement. Values are Null (Default) and all applicable agreements. |
| Currency | Drop-down menu | Select currency type. Defaults from the default price list. |
| Price List | Drop-down menu | List of all available price lists. Default is from agreement, customer, and order type. Appears as Read Only if ASO: Price List Override is set to No at the appropriate level. |

Table A-10 Create Quote Page Components

| Component | Type | Description |
|-------------------|----------------|--|
| Contract Template | Drop-down menu | List of contract templates. Defaults to template specified in OKC: Contract Template for Standard Terms and Conditions set at the appropriate level. Enabled only if ASO: Enable Use Contracts is set to Yes at the appropriate level. |

See Also:

- [Section 3.2, "Creating a Quote"](#)

A.11 Search and Select: Customer Page

Use the Search and Select: Customer page to search for customer details.

The following table lists and describes the user interface components on the Search and Select: Customer page.

Table A-11 Search and Select: Customer Page Components

| Component | Type | Description |
|-----------------|---------------|--|
| Cancel | Button | See Section A.1, "Common Elements" |
| Create Customer | Button | Accesses the Create Customer page. |
| Select | Button | See Section A.1, "Common Elements" |
| Search | Section | Section listing search parameters |
| Customer Name | Text field | Enter customer name or partial value. |
| Account Number | Text field | Enter account number or partial value and wildcard. |
| Customer Type | Radio buttons | Restricts search by Customer Type. Values are Organization and Person. |
| Contact Name | Text field | Enter a contact name or partial value and wildcard. |
| Display | Section | Determines how results are displayed. |

Table A-11 Search and Select: Customer Page Components

| Component | Type | Description |
|------------------|-----------------------------|---|
| Addresses In | Drop-down menu/Radio button | Lists addresses by country. Values are all countries. |
| Contacts | Radio button | Select to display contact name in the search results. |
| Go | Button | Refreshes page and displays search results based on search parameters. |
| Results | Section | Section displaying search results |
| Select | Radio button | Selects line. |
| Customer Name | Read-only field | Displays customer name. |
| Account Number | Read-only field | Displays account number. |
| Address | Read-only field | Displays customer address. Appears only if user chose to display addresses rather than contacts. |
| Primary | Gif | Check mark image will show up if primary address is used for billing, shipping, selling, and marketing. Appears only if user chose to display addresses rather than contacts. |
| Type | Read-only field | Displays address type. Appears only if user chose to display addresses rather than contacts. |
| Contact | Read-only field | Displays contact name for the customer. Appears only if user chose to display contacts rather than addresses. |

A.12 Create Customer Page

Use the Create Customer page to create customers.

The following table describes the user interface components on the Create Customer page.

Table A-12 Create Customer Page Components

| Component | Type | Description |
|------------------|-------------------------|---|
| Apply | Button | See Section A.1, "Common Elements" |
| Organization | Radio button/text field | Identifies customer type as an organization. |
| Person | Radio button | Identifies customer type as an individual. |
| Last Name | Text field | Enter customer's last name. |
| First Name | Text field | Enter customer's first name. |
| MI. | Text field | Enter customer's middle initial. |
| Email | Text field | Enter email address. |
| Phone Number | Text field | Enter phone number. |
| Customer Address | Section | Section listing customer address fields. |
| Country | Drop-down menu | Select country from list. Values are all countries. |
| Address Name | Text field | Enter address type (e.g. Home, Office). |
| Address | Multi-line Text field | Enter customer address. |
| City | Text field | Enter city. |
| County | Text field | Enter county. |
| State | Text field | Enter state. |
| Zip | Text field | Enter zip code. |
| Country | Read-only field | Displays country. |

See Also:

- [Section 8.2, "Creating Customers"](#)

A.13 Search and Select: Contact

The following table lists and describes the user interface components of the Search and Select: Contact page.

Table A-13 Search and Select: Contact Page Components

| Component | Type | Description |
|----------------|-----------------|---|
| Cancel | Button | See Section A.1, "Common Elements" |
| Create Contact | Button | Accesses the Create Contact page. |
| Select | Button | Selects contact and returns to the create quote page. |
| Search | Section | Section listing search parameters |
| Contact Name | Text field | Enter full or partial contact name. |
| Go | Button | See Section A.1, "Common Elements" |
| Results | Section | Section displaying search results |
| Select | Radio Button | Identifies the record to be selected. |
| Contact Name | Read-only field | Displays the contact name. |
| Primary Phone | Read-only field | Displays contact's phone number. |
| Email Address | Read-only field | Displays contact's email address |

A.14 Create Contact Page

Use the Create Contact page to create a contact and enter contact information.

The following table lists and describes the user interface components on the Create Contact page.

Table A-14 Create Contact Page Components

| Component | Type | Description |
|-----------------|----------------------|---|
| Apply | Button | See Section A.1, "Common Elements" |
| Customer Name | Read-only field | Displays customer name. |
| First Name | Text field | Enter contact's first name. |
| MI. | Text field | Enter contact's middle initial. |
| Last Name | Text field | Enter contact's last name. |
| Email | Text field | Enter email address. |
| Day Phone | Text field | Enter daytime phone number. |
| Evening Phone | Text field | Enter evening phone number. |
| Fax Number | Text field | Enter Fax number. |
| Contact Address | Section | Section listing contact address fields and information. |
| Country | Drop-down menu | Select country. Values are all countries. |
| Address Name | Text field | Specify address type (e.g. Home, Office) |
| Address | Multi-lineText field | Enter customer address. |
| City | Text field | Enter city. |
| County | Text field | Enter county. |
| State | Text field | Enter state. |
| Zip | Text field | Enter zip code. |
| Country | Read-only field | Displays country. |

See Also:

- [Section 8.2.1, "Creating Contacts"](#)

A.15 Search and Select: Address

The following table lists and describes the user interface components of the Search and Select: Address page.

Table A-15 Search and Select: Address Page Components

| Component | Type | Description/Action |
|-------------------|-----------------|---|
| Cancel | Button | See Section A.1, "Common Elements" |
| Create Address | Button | Accesses the Create Address page. |
| View All Contacts | Button | Refreshes page, listing all customer contacts. |
| Select | Button | Selects the selected line and returns to the source page. |
| Search | Section | Section listing search parameters |
| Country | Drop-down menu | Select country from list. Values are all countries. |
| Go | Button | See Section A.1, "Common Elements" |
| Results | Section | Section displaying search results |
| Select | Radio Button | Identifies the record to be selected. |
| Customer Name | Read-only field | Displays the group name. |
| Contact Name | Read-only field | Displays contact name. |
| Address | Read-only field | Displays contact's address |
| Primary | Gif | Check mark image identifies address as primary for shipping, selling, and billing information |
| Type | Read-only field | Address type. Distinguishes between shipping, billing, and selling addresses. |

A.16 Create Address Page

Use the Create Address page to enter address information.

The following table lists the user interface components on the Create Address page.

Table A-16 *Create Address Page Components*

| Component | Type | Description |
|---------------|----------------------|---|
| Apply | Button | See Section A.1, "Common Elements" |
| Customer Name | Read-only field | Displays customer name. |
| Country | Drop-down menu | Select country from list. Values are all countries. |
| Address Name | Text field | Specify address type (e.g. Home, Office). |
| Address | Multi-lineText field | Enter customer address. |
| City | Text field | Enter city. |
| County | Text field | Enter county. |
| State | Text field | Enter state. |
| Zip | Text field | Enter zip or postal code. |
| Country | Read-only field | Displays country. |

See Also:

- [Section 8.2.2, "Creating Addresses"](#)

A.17 Search and Select: Person

Use the Search and Select: Person page to search for those people set up as internal resources and sales representatives. Person Names are in a Last Name, Prefix First Name format.

The following table lists and describes the user interface components on the Search and Select: Person page.

Table A-17 Search and Select: Person Page Components

| Component | Type | Description |
|-----------|-----------------|--|
| Search | Section | Section listing search parameters |
| Person | Drop-down menu | User selects category. Categories are Employee (Default), Partner, Other, Supplier Contact, Party, All Categories. |
| Textfield | Text field | Enter keyword or partial value. |
| Go | Button | See Section A.1, "Common Elements" |
| Results | Section | Section displaying search results |
| Previous | Hyperlink | See Section A.1, "Common Elements" . |
| Next | Hyperlink | See Section A.1, "Common Elements" |
| Select | Radio button | Selects line in search results display. |
| Name | Read-only field | Displays name. |
| Category | Read-only field | Displays category type (e.g. Employee). |
| Cancel | Button | See Section A.1, "Common Elements" . |
| Select | Button | See Section A.1, "Common Elements" . |

A.18 Search and Select: Source Name Page

Use the Search and Select: Source Name page to search for marketing sources that are set up in Marketing Online. Searches are based on either Source Name or Source Code.

The following table lists and describes the user interface components on the Search and Select: Source Name page.

Table A–18 Search and Select: Source Name Page Components

| Component | Type | Description |
|-----------|--------------------------|--|
| Cancel | Button | See Section A.1, "Common Elements" . |
| Select | Button | Selects the selected source name and returns to the source page. |
| Search | Section | Section listing search parameters |
| Source | Drop-down menu/Textfield | User selects value. Either Name or Source. Enter keyword or partial value. Leave empty and select Go to view all source names/codes. |
| Results | Section | Section displaying search results |
| Select | Radio Button | Identifies the selected record. |
| Name | Read-only field | Displays source name. |
| Code | Read-only field | Displays source code. |
| Type | Read-only field | Describes the source type. |

A.19 Search and Select: Sales Group Page

Use the Search and Select: Sales Group to search for sales group information.

The following table lists and describes the user interface components on the Search and Select: Sales Group page.

Table A–19 Search and Select: Sales Group Page Components

| Component | Type | Description |
|-------------|-----------------|---|
| Select | Button | Selects the selected source name and returns to the source page. |
| Search | Section | Section listing search parameters |
| Sales Group | Text field | Enter sales group name or partial value before clicking Go to execute the search. |
| Results | Section | Section displaying search results |
| Select | Radio Button | Identifies the record to be selected. |
| Name | Read-only field | Displays the group name. |

See Also:

- [Section 15.1, "Overview of Security"](#)

A.20 Quote Overview Page

User the Quote Overview page to access and modify quote details.

The following table lists and describes the user interface components on the Quote Overview page.

Table A-20 Quote Overview Page Components

| Component | Type | Description |
|--------------------|------------------|--|
| Actions | Drop-down menu | See Section A.1, "Common Elements" |
| Go | Button | Executes the selected action. |
| Create New Version | Action menu item | Creates a new version of the quote. Disappears if: <ul style="list-style-type: none"> ■ User does not have update access, OR ■ Highest version of quote is in statuses Approval Pending, Order Submitted, or Contract Canceled, OR ■ The quote has been submitted for batch pricing. |
| Duplicate Quote | Action menu item | Duplicates the quote. Disappears if: <ul style="list-style-type: none"> ■ Quote has been submitted for batch pricing, OR ■ ASO: New Quote Security is set to Yes. |
| Freeze Prices | Action menu item | Freezes prices on quote. Disappears if: <ul style="list-style-type: none"> ■ Pricing date is not null. ■ User does not have update access to the quote, OR ■ Not the highest version of the quote, OR ■ Quote is in a read-only status, OR ■ Quote has been submitted for batch pricing. |

Table A-20 Quote Overview Page Components

| Component | Type | Description |
|------------------------|------------------|--|
| Unfreeze Prices | Action menu item | Unfreezes prices. Disappears if: <ul style="list-style-type: none"> ▪ Pricing date is null. ▪ User does not have update access to the quote, OR ▪ Not the highest version of the quote, OR ▪ Quote is in a read-only status, OR ▪ Quote has been submitted for batch pricing. |
| Place Order | Action menu item | Submits the quote to Order Management. Disappears if: <ul style="list-style-type: none"> ▪ ASO: Enable Submit is set to No, OR ▪ User does not have update access to the quote, OR ▪ Not the highest version of the quote, OR ▪ Quote is in Order Submitted status, OR ▪ Quote has been submitted for batch pricing. |
| Price Quote | Action menu item | Prices quote. Disappears if: <ul style="list-style-type: none"> ▪ User does not have update access, OR ▪ Not the highest version of the quote, OR ▪ Quote is in a read-only status, OR ▪ Quote has been submitted for batch pricing. |
| Cancel Pricing Request | Action menu item | Cancels an in-progress pricing request. Disappears if: <ul style="list-style-type: none"> ▪ ASO: Enable Batch Processing is set to No, OR ▪ The quote is not submitted for batch processing, OR ▪ User does not have update access to the quote, OR ▪ Not the highest version of the quote, OR ▪ Quote is in a read-only status. |

Table A-20 Quote Overview Page Components

| Component | Type | Description |
|-----------------------|------------------|---|
| Initiate Credit Check | Action menu item | <p>Initiates a credit check.</p> <p>Disappears if:</p> <ul style="list-style-type: none"> ■ ASO: Enable Credit Check is set to No, OR ■ User does not have update access to the quote, OR ■ Not the highest version of the quote, OR ■ Quote is in Order Submitted status, OR ■ Quote has been submitted for batch pricing. |
| Web Publish Quote | Action menu item | <p>Accesses the Publish page.</p> <p>Disappears if:</p> <ul style="list-style-type: none"> ■ ASO: Enable Web Publishing is set to No, OR ■ Quote is web published, OR ■ User does not have update access to the quote, OR ■ Not the highest version of the quote, OR ■ Quote is in Order Submitted or Inactive status, OR ■ Quote has been submitted for batch pricing. |
| Web Unpublish Quote | Action menu item | <p>Unpublishes a quote.</p> <p>Disappears if:</p> <ul style="list-style-type: none"> ■ ASO: Enable Web Publishing is set to No, OR ■ Quote is not web published, OR ■ User does not have update access to the quote, OR ■ Not the highest version of the quote, OR ■ Quote is in Order Submitted or Inactive status, OR ■ Quote has been submitted for batch pricing. |
| Print Quote | Action menu item | <p>Accesses Print Quote page.</p> <p>Disappears if:</p> <ul style="list-style-type: none"> ■ Not the highest version of the quote, OR ■ Quote has been submitted for batch pricing. |

Table A-20 Quote Overview Page Components

| Component | Type | Description |
|---------------------|---------------------------|--|
| General Information | Section | Section listing general quote information. |
| Quote Name | Read-only field | Displays quote name. |
| Quote Number | Read-only field | Displays quote number and version. |
| Customer Name | Read-only field/Hyperlink | Displays Customer Name. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Account Number | Read-only field/Hyperlink | Displays Account Number. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Contact Name | Read-only field/Hyperlink | Displays Contact Name. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Opportunity Name | Read-only field/Hyperlink | Displays Opportunity Name. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Address | Read-only field | Displays address. Links to customer details if ASO: Enable OSO Integration is set to Yes . |
| Expiration Date | Read-only field | Displays expiration date. |
| Status | Read-only field | Displays quote status |
| Primary Salesperson | Read-only field | Displays Primary Salesperson name. |
| Primary Sales Group | Read-only field | Displays Primary Sales Group name. |
| Sales Channel | Read-only field | Displays Sales Channel type. |
| Source Name | Read-only field | Displays Source name. |
| Order Type | Read-only field | Displays Order Type. |
| Agreement | Read-only field | Displays Agreement. |
| Currency | Read-only field | Displays currency. |
| Price List | Read-only field | Displays quote price list. |

Table A-20 Quote Overview Page Components

| Component | Type | Description |
|-------------------------|----------------------------|---|
| Contract Template | Read-only field | Displays template name. |
| Contract Number | Read-only field | Displays contract number. |
| Pricing Status | Read-only field | Displays the pricing status of the quote. |
| Tax Status | Read-only field | Displays the tax status of the quote. |
| Order Number | Read-only field | Displays order number. |
| Web Published | Read-only field | Displays Web Published status: Either Yes or No. |
| Pricing Request | Read-only field | Displays the pricing request number, if the pricing call was submitted as a concurrent request. |
| Lines | Section | Section listing product details. |
| Line | Read-only field | Displays the line number. |
| Product | Read-only field | Displays part number. |
| Description | Hyperlink | Linked text displays product name. Accesses the Line Details Pop-Up window. |
| UOM | Text field/Read-only field | Displays the unit of measurement. |
| Quantity | Read-only field | Displays product quantity. |
| Unit List Price | Read-only field | Displays Unit List Price. |
| Unit Adjustment Percent | Read-only field | Displays the unit adjustment for the line. |
| Unit Selling Price | Hyperlink | Linked numeric text displays unit selling price. Opens the Pricing Details Pop-Up window. |
| Total Price | Read-only field | |
| Grand Total | Subsection | Displays grand total information for the quote. |
| Sub-Total (List Price) | Read-only field | Displays the sum of the list price for all products and quantity on the quote. |

Table A-20 Quote Overview Page Components

| Component | Type | Description |
|---------------------------|-----------------|--|
| Total Adjustment Percent | Read-only field | Displays total adjustment percent of (Total Adjustments/Total List Price) for all products and quantity on the quote. Displayed in brackets if the amount is negative. |
| Total Adjustment Amount | Read-only field | Displays the sum of the adjustments for all products and quantity on the quote. Displayed in brackets if the amount is negative. |
| Sub-Total (Selling Price) | Read-only field | Displays the difference between the Subtotal and the Total Adjustment Amount. |
| US Sales Tax 1 | Read-only field | Displays one line for each tax code applied to the quote. Displays tax code description and total tax amount for the tax code. |
| Charges | Hyperlink | Displays the sum of all freight and special charge modifiers applied to the quote. Selecting the link opens the Charge Summary page. |
| Total | Read-only field | Displays the total sum of the following amounts: Sub-total, Tax Codes, Charges |
| Addresses | Section | Section listing address information. Broken into two section: Shipping and Billing. |
| Customer Name | Read-only field | Displays customer name. |
| Account Number | Read-only field | Displays account number. |
| Contact Name | Read-only field | Displays contact name for customer. |
| Address | Read-only field | Displays address in line-by-line format. |
| Shipping | Section | Section listing shipping information. |
| Shipping Method | Read-only field | Displays shipping method. |
| Requested Delivery Date | Read-only field | Displays the requested delivery date. |
| Shipping Instructions | Read-only field | Displays shipping instructions. |

Table A–20 Quote Overview Page Components

| Component | Type | Description |
|------------------------|-----------------|---------------------------------------|
| Packing Instructions | Read-only field | Displays packing instructions. |
| Payment | Section | Section listing payment information. |
| Payment Terms | Read-only field | Lists agreed upon payment terms. |
| Payment Type | Read-only field | Displays payment type. |
| PO Number | Read-only field | Displays purchase order number. |
| Check Number | Read-only field | Displays check number. |
| Credit Card Type | Read-only field | Displays credit card type. |
| Credit Card Number | Read-only field | Displays credit card number. |
| Cardholder Name | Read-only field | Displays cardholder's name. |
| Credit Card Expiration | Read-only field | Displays credit card expiration date. |

A.21 Charge Summary Page

The Charge Summary page displays the charges total for the entire quote.

The following table lists and describes the user interface components on the Charge Summary page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–21 Header Level Charges Page Components

| Component | Type | Description |
|-----------|-----------------|--|
| Name | Read-only field | Displays the name of the Freight and Special Charge modifier. |
| Level | Read-only field | Displays the modifier level set up in Oracle Pricing. |
| Type | Read-only field | Displays a concatenation of the type and sub type for the Freight and Special Charge modifier. |

Table A–21 Header Level Charges Page Components

| Component | Type | Description |
|------------------|-----------------|---|
| Amount | Read-only field | Displays the amount of the modifier. |
| Total | Read-only field | Displays the total of all modifiers applied to the quote. |
| Close | Button | Closes the Charges Summary page and returns the user to the Quote Lines page. |

A.22 Overview Sidebar

The Quote Overview page contains a sidebar on the left-side of the page, providing links to several key areas of the application. The sidebar is broken into three main sections: Quote Information, Sales, and Other Information. Your Application Developer can customize this menu and therefore, the options available in your Sidebar menu may differ from the list below.

The following table lists and describes the user interface components on the Overview Sidebar.

Table A–22 Overview Sidebar Components

| Component | Type | Description |
|------------------------|-------------|--|
| Overview | Hyperlink | Accesses the Overview page. |
| Quote Information | Section | Section listing Quote Information links. |
| General | Hyperlink | Accesses the General page. |
| Lines | Hyperlink | Accesses the Lines page where you can view and edit product information |
| Pricing | Hyperlink | Accesses the Pricing page where you can view and edit pricing information. |
| Shipping and Billing | Hyperlink | Accesses the Shipping and Billing Information page, where you can view and edit shipping, billing and payment information. |
| Additional Information | Hyperlink | Accesses the Additional Information page. |
| Sales Information | Section | Section listing Sales Information links. |
| Sales Team | Hyperlink | Accesses the Sales Team page where you can view and edit quote Sales Team information. |

Table A-22 Overview Sidebar Components

| Component | Type | Description |
|-------------------|-------------|---|
| Sales Credit | Hyperlink | Accesses the Sales Credit page where you can view and edit credit information. |
| Proposals | Hyperlink | Accesses the Proposals page where you can view and create proposals. |
| Approvals | Hyperlink | Accesses the Approvals page where you can view and edit approval information. |
| Contracts | Hyperlink | Accesses the Contracts page where you can view and edit contract information. |
| Tasks | Hyperlink | Accesses the Tasks page where you can view and edit Tasks. |
| Other Information | Section | Section listing links for other Information. |
| Sales Supplement | Hyperlink | Accesses the Sales Supplement page where you can view sales supplement information. |
| Notes | Hyperlink | Accesses the Notes page where you can view and edit Notes. |
| Attachments | Hyperlink | Accesses the Attachments page where you can view attachment information, and add attachments. |
| Versions | Hyperlink | Accesses the Versions page where you can view version information. |

A.23 Price Quote Page

The Price Quote page is used to manually calculate prices and/or taxes for a quote. The page is not available if:

- **ASO: Calculate Price** is set to **Automatic**
- **ASO: Calculate Tax** is set to **Automatic**
- **ASO: Enable Batch Processing** is set to **No**

The following table lists and describes the user interface components on the Price Quote page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-23 Price Quote Page Components

| Component | Type | Description |
|--------------------|---------------|--|
| Compute Options | Radio buttons | Select to calculate Price Only , Tax Only or Both for the quote. The compute option Tax Only is disabled if ASO: Calculate Tax is set to Automatic . |
| Submission Options | Radio buttons | Select to submit the pricing request now or submit the pricing request through a concurrent program and notify the sales representative when it completes. Submit pricing request and notify me when it is complete is disabled if ASO: Enable Batch Processing is set to No . |
| Submit | Button | Select to submit the request. |

A.24 Pricing Request Details Page

The Price Request Details page is used to view the details of a pricing or tax calculation request. This page is only available if **ASO: Enable Batch Processing** is set to **Yes**.

The following table lists and describes the user interface components on the Price Request Details page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-24 Pricing Request Details Page Components

| Component | Type | Description |
|------------------------|-----------------|--|
| Request Id | Read-only field | Displays the concurrent request ID for the submitted pricing and/or tax calculation request. |
| Request Name | Read-only field | Displays the request name. |
| Phase | Read-only field | Displays the request phase. Possible values are Pending, Running, or Inactive. |
| Status | Read-only field | Displays the status of the request. |
| Date Submitted | Read-only field | Displays the date the request was submitted. |
| Requestor | Read-only field | Displays the requestors name. |
| Date Started | Read-only field | Displays the date the request began running. |
| Done | Button | Closes the Pricing Request Details page. |
| Cancel Pricing Request | Button | Cancels the in-progress pricing request. |

A.25 Print Quote Page

Use the Print Quote page (Printing) to choose printout options and print quotes.

The following table lists and describes the user interface components on the Print Quote page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-25 Print Quote Page Components

| Component | Type | Description |
|-----------|--------|----------------------------------|
| Done | Button | Takes you back to previous page. |
| Submit | Button | Generates printout. |

Table A-25 Print Quote Page Components

| Component | Type | Description |
|--|---------------------------|---|
| Output Format | Updateable Drop-down menu | Allows you to select the output format. Values are Adobe PDF (Default) and Rich Text Format. Values sourced from Order Capture lookup ASO_PQUOTE_OUTPUT_FMT. |
| Template | Updateable Drop-down menu | Allows you to select the template for printout. Seeded value is Default print layout . Values sourced from Order Capture lookup ASO_PQUOTE_TEMPLATES. |
| Show subtotal by product category | Checkbox | If checked, the subtotal for each product category will be printed at the end of the report. Use product categories belonging to the default category set for the Order Management functional area. Should not be checked by default. |
| Show Price Adjustments | Checkbox | If checked, price adjustments and list prices will print. Should be checked by default. |
| Show Header Attachments (text type only) | Checkbox | Enabled if ASO: Print Quote Show Attachments is Yes . If enabled, it should be unchecked by default. If checked, all header level Text type attachments in the Miscellaneous document category will print. |
| Show Charges | Checkbox | If checked, charges details appear on the quote printout. If unchecked, charges details are not printed but, total charges are displayed in the Subtotal section of the printout. |
| Print in executable mode | Checkbox | Should appear only if the quote is executable. With Contracts integration: If checked, the T&Cs and signature block will print. Without Contracts integration: If checked, the signature block will print. Should be checked by default. |

See Also:

- [Section 17.2, "Printing a Quote"](#)

A.26 Publish Page

Use the Publish page to publish quotes online.

The following table describes the user interface components on the Publish page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-26 Publish Page Components

| Component | Type | Description |
|------------------|--------------------------------|--|
| Submit | Button | Publishes the quote. |
| Username | Text field/ Read-only field | If mandatory text field appears, the quote-to customer is not an FND_USER. Enter a username for the quote-to customer. Read-only when quote-to customer is an FND_USER. |
| Web Publish In | Drop-down menu | Lists specialty stores that quote version is eligible to be published in. Defaults to the Specialty Store ID stored in the quote header, if one exists. |
| Send Email To | Prompt | Displays options for email contact. |
| Existing Address | Radio button/Text field | Values are all email address for the sold_to contact/customer. Disappears if there are no existing email addresses. |
| New Address | Radio button/Text field | Select with radio button and then add in new email address manually in text field. |
| Comments | Text field | Enter any relevant comments. |

See Also:

- [Section 17.4, "Web Publishing a Quote"](#)

A.27 General Page

Displays general information created when creating a quote. Use this page to view and modify information.

The following table describes the user interface components on the General page.

Table A-27 General Page Components

| Component | Type | Description |
|---------------------|--------------------------------|---|
| Revert | Button | Reverts the quote to its saved state in the database. Disappears if user does not have Update access and/or quote is not the highest version. |
| Apply | Button | Applies changes. Disappears if user does not have Update access and/or quote is not the highest version. |
| General Information | Section | Section listing general information. |
| Quote Name | Text field | Enter new quote name. Read-only field if user does not have Update access and/or quote is not the highest version and/or the quote version is Web Published. |
| Quote Number | Read-only field | Displays quote number and version. |
| Customer Name | Read-only field/Hyperlink | Displays customer name. Links to customer detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. |
| Account Number | Read-only field/Drop-down menu | Displays account number. Links to account detail if ASO: Enable OSO Integration is set to Yes at the appropriate level. If Quote-To customer has multiple accounts, the drop-down displays account numbers and descriptions separated by a dash. |
| Contact Name | LOV/text field | Select new contact name. Read-only field if user does not have Update access and/or quote is not the highest version and/or the quote version is Web Published. |
| Go | Button | Accesses the Search and Select: Contact page. |
| Opportunity Name | LOV/text field | Enter a full opportunity name or a partial value and select Go to access the Search and Select: Opportunity page. |

Table A-27 General Page Components

| Component | Type | Description |
|---------------------|--------------------------|---|
| Go | Button | Accesses the Search and Select: Opportunity page. |
| Address | Text field | Enter new address. Read-only field if user does not have Update access and/or quote is not the highest version. |
| Go | Button | Accesses the Search and Select: Address page. |
| Expiration Date | Text field/Calendar tool | Text field displays expiration date. Use Calendar tool to change expiration date. Read-only field if user does not have Update access and/or quote is not the highest version. |
| Status | Drop-down menu | Select new status. Values are current status (default) and all statuses. Read-only field if user does not have Update access and/or quote is not the highest version. |
| Primary Salesperson | LOV | Displays salesperson name. Optionally select a different salesperson. Read-only field if user does not have Update access and/or quote is not the highest version, and/or ASO: Update Sales Team is set to No at the appropriate level. |
| Go | Button | Accesses the Search and Select: Person page. |
| Primary Sales Group | Drop-down menu | Select a different primary sales group. Displays all available sales groups that the salesperson belongs to. Read-only field if user does not have Update access and/or quote is not the highest version, and/or ASO: Update Sales Team is set to No at the appropriate level. |
| Sales Channel | Drop-down menu | Select a different sales channel. Values are Null and all sales channels. Read-only field if user does not have Update access and/or quote is not the highest version. |
| Source Name | LOV | Enter a different source name. Read-only field if user does not have Update access and/or quote is not the highest version. |
| Go | Button | Accesses the Search and Select: Source Name page. |

Table A-27 General Page Components

| Component | Type | Description |
|-------------------|-----------------|---|
| Order Type | Read-only field | Displays the order type. |
| Agreement | Drop-down menu | Select new agreement. Values are Null and all universal and customer-specific agreement in quote currency. Read-only field if user does not have Update access and/or quote is not the highest version. |
| Currency | Read-only field | Displays currency. |
| Price List | Drop-down menu | Select new price list. Values are Null and all price lists for the quote currency. Read-only field if user does not have Update access and/or quote is not the highest version, and/or ASO: Price list Override is set to No at the appropriate level. |
| Contract Template | Drop-down menu | Select new contract template. Values are all contract templates. Appears only if ASO: Enable Use Contracts is set to Yes at the appropriate level. Read-only field if user does not have Update access and/or quote is not the highest version, and/or a contract is attached to the quote. |

A.28 Search and Select: Opportunity Page

Use the Search and Select Opportunity page to search for and select an opportunity to associate to your quote.

The following table lists and describes the user interface components of the Search and Select: Opportunity page.

Table A-28 Search and Select: Opportunity Page Components

| Component | Type | Description |
|------------------|---------------------------|---|
| Search | Section | Displays the search criteria. |
| Opportunity | Drop-down menu/Text field | Select whether you want to search by opportunity name or number and enter a full or partial value (followed by a wildcard) in the text field. |
| Go | Button | Executes the search. |

Table A–28 Search and Select: Opportunity Page Components

| Component | Type | Description |
|-----------------|-----------------|--|
| Results | Section | Displays the search results. |
| Select | Radio button | Selects the opportunity to be associated with the quote. |
| Name | Read-only field | Displays the opportunity name. |
| Number | Read-only field | Displays the opportunity number. |
| Sales Stage | Read-only field | Displays the sales stage. |
| Win Probability | Read-only field | Displays the opportunity win probability. |
| Status | Read-only field | Displays the opportunity status. |
| Close Date | Read-only field | Displays the opportunity close date. |
| Amount | Read-only field | Displays the opportunity amount. |
| Cancel | Button | Cancels any action and returns the user to the General page. |
| Select | Button | Applies changes and returns the user to the General page. |

A.29 Lines Page

Use the Lines page to access and edit product and discount information.

The following table lists and describes the user interface components of the Lines page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–29 Lines Page Components

| Component | Type | Description |
|----------------------------------|--------|--|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Check Availability | Button | Accesses the Availability Information page. |
| Add Service to Previous Purchase | Button | Accesses the Specify Service Reference page. |

Table A–29 Lines Page Components

| Component | Type | Description |
|-------------------------|----------------------------|--|
| Add Product | Button | Accesses the Search and Select: Product page. |
| Select Line and... | Prompt | Identifies action to be taken after line is selected. |
| Actions | Drop-down menu | See Section A.1, "Common Elements" |
| Go | Button | Executes the selected Action. |
| Select | Radio button | Identifies the record to be selected. |
| Line | Read-only field | Displays the line number. |
| Product | Read-only | Displays the Inventory part number. |
| Description | Hyperlink | Linked description accesses the Line Details pop-up window. If the product is a configured model, the total price appears below the description. If the product is a service for a product on the quote, the line is indented under the serviceable product. |
| UOM | Read-only field | Displays unit of measurement. |
| Quantity | Text field/Read-only field | Lists product quantity. Read only if line is a service. |
| Unit List Price | Read-only field | Displays unit list price. |
| Unit Adjustment Percent | Text field/Read-only field | Total of all adjustments currently applied to the quote line. Displayed as a percent of the unit list price. Displayed as a negative value if the unit adjustment is negative; displayed as a positive amount if value is positive. Read-only if ASO: Discounting Privilege is set to Partial or None . |
| Unit Selling Price | Text field | Displays unit net selling price. Updateable if ASO: Discounting Privilege is set to Full . Icon links to Adjustments pop-up window. |
| Total Price | Read-only field | Displays total selling price. |

Table A-29 Lines Page Components

| Component | Type | Description |
|------------------------|-----------------|--|
| Charges | Hyperlink | Displays total of all modifiers of type Freight and Special Charge for the line. Links to Charges Details page. |
| Line Category | Read-only field | Displays line category. Return or Order. |
| Line Type | Drop-down menu | Select a line type. Enabled for non-configured products and configured products whose line type is not populated by Configurator. If ASO: Enable Line Type is set to No , the line type LOV shows only line types with the line category Order . If ASO: Enable Line Type is set to Yes , the Line Type LOV shows line types with the line categories Order and Return . |
| Tax Details | Read-only field | Displays code, rate, and amount for each tax applied to the line. Only displayed if ASO: Show Line Level Tax Details is set to Yes . |
| Instance Name | Read-only field | Displays a unique name generated by Configurator and passed to Installed Base upon fulfillment. Applies only to configured products. |
| Custom Column 1 | Hyperlink | This link is defined by the customer. Not enabled unless a JSP page has been provided. Please see the Oracle Quoting Implementation Guide for more information. |
| Custom Column 2 | Hyperlink | This link is defined by the customer. Not enabled unless a JSP page has been provided. Please see the Oracle Quoting Implementation Guide for more information. |
| Custom Column 3 | Hyperlink | This link is defined by the customer. Not enabled unless a JSP page has been provided. Please see the Oracle Quoting Implementation Guide for more information. |
| Grand Total | Subsection | Displays grand total information. |
| Sub-Total (List Price) | Read-only field | Displays the sum of the list price for all products and quantity on the quote. |

Table A-29 Lines Page Components

| Component | Type | Description |
|---------------------------|-----------------|--|
| Header Manual Discount | Text box | Displays the header manual discount amount. The sign of the percentage is interpreted based on the profile ASO: Require Minus Sign for Manual Discount . Appears only if: ASO: Discounting Privilege is set to Full AND/OR User has update access to the quote AND/OR Quote is in the highest version AND/OR The status is not read-only |
| Total Adjustment Percent | Read-only field | Displays total adjustment percent of (Total Adjustments/Total List Price) for all products and quantity on the quote. Displayed in brackets if the amount is negative. |
| Total Adjustment Amount | Read-only field | Displays the sum of the adjustments for all products and quantity on the quote. Displayed in brackets if the amount is negative. |
| Sub-Total (Selling Price) | Read-only field | Displays the difference between the Subtotal and the Total Adjustment Amount. |
| US Sales Tax 1 | Read-only field | Displays one line for each tax code applied to the quote. Displays tax code description and total tax amount for the tax code. |
| Charges | Hyperlink | Displays the sum of all freight and special charge modifiers applied to the quote. Selecting the link opens the Charge Summary page. |
| Total | Read-only field | Displays the total sum of the following amounts: Sub-total, Tax Codes, Charges |

See Also:

- [Section 10.1, "Adding Products to the Quote"](#)
- [Section 10.2, "Removing Products From the Quote"](#)
- [Section 10.4, "Configuring Products"](#)
- [Section 10.6, "Adding Related Product"](#)

A.30 Product Details Page

The Product Details page is a pop-up window displaying product details.

The following table lists and describes the user interface components on the Product Details page.

Table A-30 Product Details Page Components

| Component | Type | Description |
|----------------------|-----------------|--|
| Product | Read-only field | Displays part number. |
| Description | Read-only field | Displays product description. |
| Product Type | Read-only field | Displays product type. |
| Support Service | Read-only field | Indicates whether or not the product is a support service. |
| Configurable | Read-only field | Indicates if the product is configurable. |
| Serviceable | Read-only field | Indicates if the product is serviceable. |
| Shippable | Read-only field | Indicates if the product is shippable. |
| Returnable | Read-only field | Indicates if the product is returnable. Returnable products can be traded-in. |
| Serial Number | Read-only field | Displays the product serial number. Appears only if the product is from the Installed Base. |
| System | Read-only field | Displays the product's system. Appears only if the product is from the Installed Base |
| Installed At Address | Read-only field | Displays the installed at address. Appears only if the product is from the Installed Base |
| Order Date | Read-only field | Displays the order date. Appears only if the product is from the Installed Base |
| Selected Service | Section | Displays service information for the product if the product is serviceable. |
| Product | Read-only field | Displays the service part number. |
| Description | Read-only field | Displays the service description. |
| Duration | Read-only field | Displays the service duration. |
| Period | Read-only field | Displays the service period. |

Table A-30 Product Details Page Components

| Component | Type | Description |
|----------------------|-----------------|--|
| Start Date | Read-only field | Displays the start date for the service. |
| Included | Read-only field | Designates if the service is included in the price of the product. |
| Service For | Section | Displays the service reference information. Appears only if the product is a service. |
| Service For | Read-only field | Displays the serviceable product location. Appears only if the product is a service. |
| Order Date | Read-only field | Displays the order date for the serviceable product. Appears only if the Service For is Pending Order. |
| Order Number | Read-only field | Displays the order number for the serviceable product. Appears only if the Service For is Pending Order. |
| Order Line Number | Read-only field | Displays the order line number for the serviceable product. Appears only if the Service For is Pending Order. |
| Description | Read-only field | Displays the serviceable product description. Appears only if the product is a service. |
| Product | Read-only field | Displays the serviceable product part number. Appears only if the product is a service. |
| Quantity | Read-only field | Displays the serviceable product quantity. Appears only if the product is a service. |
| UOM | Read-only field | Displays the serviceable product UOM. Appears only if the product is a service. |
| Serial Number | Read-only field | Displays the serial number for the serviceable product. Appears only if Service For is Installed Base. |
| System | Read-only field | Displays the system for the serviceable product. Appears only if Service For is Installed Base. |
| Installed At Address | Read-only field | Displays the Installed At Address for the serviceable product. Appears only if Service For is Installed Base. |

Table A-30 Product Details Page Components

| Component | Type | Description |
|------------------|-----------------|--|
| Order Date | Read-only field | Displays the order date for the serviceable product. Appears only if Service For is Installed Base. |
| Service Details | Section | Displays the service details. Appears only if the product is a service. |
| Duration | Read-only field | Displays the service duration. Appears only if the product is a service. |
| Period | Read-only field | Displays the service period. Appears only if the product is a service. |
| Start Date | Read-only field | Displays the service start date. Appears only if the product is a service. |
| Close | Button | Closes the pop-up window. |

A.31 Charges Details

The Charges Details page displays the line level charges for the product.

The following table lists and describes the user interface components on the Charges Details page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-31 Charges Details Page Components

| Component | Type | Description |
|-----------|-----------------|--|
| Name | Read-only field | Displays the name of the Freight and Special Charge modifier. |
| Type | Read-only field | Displays a concatenation of the type and sub type for the Freight and Special Charge modifier. |
| Amount | Read-only field | Displays the amount of the modifier. |
| Total | Read-only field | Displays the total of all modifiers applied to the Line. |
| Close | Button | Closes the Charges Details page and returns the user to the Quote Lines page. |

A.32 Pricing Details Page

The Pricing Details page displays all adjustments for a line.

The following table lists and describes the user interface components on the Pricing Details page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-32 Pricing Details Page Components

| Component | Type | Description |
|---------------------|-----------------|--|
| Pricing Adjustments | Section | Displays all pricing adjustments applied to the line. |
| Name | Read-only field | Displays the modifier name for the pricing adjustment. |
| Level | Read-only field | Displays the level at which the modifier is applied. |
| Type | Read-only field | Displays the modifier type. |
| Amount | Read-only field | Displays the adjustment amount. |
| Percent | Read-only field | Displays the adjustment percent. |
| Total | Read-only field | Displays the total of all adjustments. |

Table A–32 Pricing Details Page Components

| Component | Type | Description |
|-----------|--------|--|
| Close | Button | Closes the page and returns you to the Lines page. |

A.33 Specify Service Reference

Use the Specify Service Reference page to add a service to a previous purchase.

The following table lists and describes the user interface components on the Specify Service Reference page.

Table A–33 Specify Service Reference Page Components

| Component | Type | Description |
|---------------------------|------------------------|---|
| Source | Section | Displays the source for the search. |
| Add Service to Product In | Drop-down menu | Specify the source that you want to apply the service to. Changing the selection automatically refreshes the page to the Installed Base or Pending Orders search screen. Values are Installed Base or Pending Order. |
| Search | Section | Displays the search parameters. |
| Category | Drop-down menu | Select the product category by which to search. Values are null and all product categories for the functional area Order Entry. Appears only if the Source is Installed Base. |
| Order Number | Text field | Enter the order number by which to search. |
| Order Date From | Text box/Calendar icon | Restricts search by sales order date range. Select the starting date for the order date range. |
| Order Date To | Text box/Calendar icon | Select the end date for the order date range. |
| Product | Text box | Enter the inventory product number. |
| Description | Text box | Enter the product description. |
| Serial Number | Text box | Enter the Installed Base serial number. Appears only if the Source is Installed Base. |

Table A-33 Specify Service Reference Page Components

| Component | Type | Description |
|-----------------------|-----------------|---|
| System | Text box | Enter the Installed Base system name. Appears only if the Source is Installed Base. |
| Installed At City | Text box | Enter the Installed at City by which to search. Appear only if the Source is Installed Base. |
| Installed At Country | Drop-down menu | Select the Installed at Country by which to search. Appear only if the Source is Installed Base. |
| Attribute Name | Text box | Select the attribute name by which to search. Appear only if the Source is Installed Base |
| Go | Button | Accesses the Search and Select: Extended Attributes page. |
| Attribute Value | Text box | Enter an attribute value by which to search. Appear only if the Source is Installed Base |
| Instance Number | Text box | Enter an Instance name by which to search. Appear only if the Source is Installed Base |
| Go | Button | Executes the search. |
| Results | Section | Displays results of the search if Installed Base is the source. |
| Select Product and... | Prompt | Appears only if search has been executed and there is at least one result line. |
| Add Service | Button | Accesses the Add Service page. |
| Select | Radio Button | Identifies row to be selected. |
| Product | Read-only field | Displays the product number. |
| Description | Hyperlink | Linked description accesses the Installed Base Product Details window. |
| UOM | Read-only field | Displays the UOM. |
| Quantity | Read-only field | Displays the quantity. |
| Serial Number | Read-only field | Displays the serial number. |
| System | Read-only field | Displays the system name. |

Table A-33 Specify Service Reference Page Components

| Component | Type | Description |
|-----------------------|-----------------|---|
| Installed At Address | Read-only field | Displays the installed at address. |
| Results | Section | Displays results of the search if Pending Orders is the source. |
| Select Product and... | Prompt | Appears only if search has been executed and there is at least one result line. |
| Add Service | Button | Accesses the Add Service page. |
| Select | Radio button | Identifies selected row. |
| Order Date | Read-only field | Displays the order date for the order containing the serviceable product. |
| Order Number | Read-only field | Displays the order number for the order containing the serviceable product. |
| Order Line Number | Read-only field | Displays the order line number for the serviceable product. |
| Product | Read-only field | Displays the serviceable product part number. |
| Description | Read-only field | Displays the serviceable product description. |
| UOM | Read-only field | Displays the serviceable product UOM. |
| Quantity | Read-only field | Displays the serviceable product quantity. |
| Cancel | Button | Cancels the process and returns you to the Lines page. |

A.34 Search and Select: Product

The following table lists and describes the user interface components on the Search and Select: Product page.

Table A-34 Search and Select: Product Page Components

| Component | Type | Description |
|---------------------|---------------------------|---|
| Source | Section | Displays the source of the search. |
| Search In | Drop-down menu | Choose to search the product catalog for products to add to the quote or search the Installed Base for trade-ins. Selecting Installed Base accesses the Search and Select: Installed Base page. |
| Cancel | Button | See Section A.1, "Common Elements" |
| Select and Add More | Button | Adds selected products to the quote and returns the user to the Search and Select: Product page, allowing the user to search for more products. |
| Select | Button | Adds the selected product(s) to the quote and returns to the Lines page. |
| Search | Section | Section listing search parameters |
| Product | Drop-down menu | User selects product category. Values are All Categories (Default) and all categories in the category set defined for the functional area Order Entry. |
| Text field | Text field | Enter product name or partial value before selecting Go to execute the search. |
| Go | Button | See Section A.1, "Common Elements" |
| Results | Section | Section displaying search results |
| Previous | Read-only field/Hyperlink | See Section A.1, "Common Elements" |
| Next | Read-only field/Hyperlink | See Section A.1, "Common Elements" |
| Select | Checkbox | Identifies the record to be selected. |
| Product | Read-only field | Displays product number. |
| Description | Read-only field | Displays product description. |
| UOM | Read-only field | Displays unit of measurement. |

Table A–34 Search and Select: Product Page Components

| Component | Type | Description |
|-----------------|----------------|---|
| Line Price List | Drop-down menu | User selects price list. Values are Null (Default), and all valid price lists for the quote's currency. Disappears if ASO: Price List Override is set to Yes at the appropriate level. |

A.35 Search and Select: Installed Base Product

The following table lists and describes the user interface components on the Search and Select: Installed Base page.

Table A–35 Search and Select: Installed Base Page Components

| Component | Type | Description |
|------------------------|-----------------|---|
| Source | Section | Displays the source of the search. |
| Search In | Drop-down menu | Choose to search the product catalog for products to add to the quote or search the Installed Base for trade-ins. Selecting Product Catalog accesses the Search and Select: Product page. |
| Cancel | Button | See Section A.1, "Common Elements" |
| Select and Add More | Button | Adds selected products to the quote and returns the user to the Search and Select: Product page, allowing the user to search for more products. |
| Select | Button | Adds the selected product(s) to the quote and returns to the Lines page. |
| Search | Section | Section listing search parameters |
| Action | Section | Displays the current action. |
| Search for Product to: | Read-only field | Prompt |
| Basic Information | Section | Displays basic search criteria. |
| Category | Drop-down menu | User selects product category. Values are All Categories (Default) and all products in the category set defined for the functional area Order Entry. |
| Order Number | Text field | Enter the order number by which to search. |

Table A-35 Search and Select: Installed Base Page Components

| Component | Type | Description |
|----------------------|---------------------------|---|
| Order Date From | Text field/Calendar icon | Enter the order start date. |
| Order Date To | Text field/Calendar icon | Enter the order ending date. |
| Product | Text field | Enter the product part number. |
| Description | Text field | Enter the product description. |
| Serial Number | Text field | Enter the product serial number. |
| System | Text field | Enter the system name. |
| Installed At City | Text field | Enter the installed at city by which to search. |
| Installed At Country | Drop-down menu | Select the installed at country by which to search. |
| Attribute Name | Text field | Enter an attribute by which to search. |
| Go | Button | Accesses the Search and Select: Extended Attributes page. |
| Attribute Value | Text field | Enter the attribute value by which to search. |
| Instance Number | Text field | Enter the instance number by which to search. |
| Go | Button | Executes search. |
| Results | Section | Section displaying search results |
| Previous | Read-only field/Hyperlink | See Section A.1, "Common Elements" |
| Next | Read-only field/Hyperlink | See Section A.1, "Common Elements" |
| Select | Checkbox | Identifies the record to be selected. |
| Product | Read-only field | Displays product number. |
| Description | Read-only field | Displays product description. |

Table A–35 Search and Select: Installed Base Page Components

| Component | Type | Description |
|----------------------|-----------------|---|
| UOM | Read-only field | Displays unit of measurement. |
| Quantity | Read-only field | Displays the product quantity. |
| Serial Number | Read-only field | Displays the product serial number. |
| System | Read-only field | Displays the system name. |
| Installed At Address | Read-only field | Displays the installed at address. |
| View Relationships | Linked icon | Accesses the View Relationships page. Displayed only if the product is a configured Model product. |
| Line Price List | Drop-down menu | User selects price list. Values are Null (Default), and all valid price lists for the quote's currency. Disappears if ASO: Price List Override is set to Yes at the appropriate level. |

A.36 Search and Select: Extended Attributes

Access the Search and Select: Extended Attributes page from the Go button located next to the Attributes field on the Search and Select: Installed Base Product page.

The following table lists and describes the user interface components on the Search and Select: Extended Attributes page.

Table A–36 Search and Select: Extended Attributes Page Components

| Component | Type | Description |
|----------------|-----------------|---|
| Search | Section | Displays search criteria for extended attributes. |
| Attribute Name | Text field | Enter an attribute name by which to search. |
| Go | Button | Executed the search. |
| Results | Section | Displays results of the search. |
| Previous | Hyperlink | Accesses previous page of display. |
| Next | Hyperlink | Advances to next page of display. |
| Select | Radio button | Indicates selected attribute. |
| Name | Read-only field | Displays attribute name. |

Table A-36 Search and Select: Extended Attributes Page Components

| Component | Type | Description |
|--------------|-----------------|--|
| Attribute Of | Read-only field | Displays service that attribute is associated with. |
| Cancel | Button | Cancels the selection and returns user to the Search and Select: Installed Base Products page. |
| Select | Button | Adds the selected attribute to the Installed Base product search as part of the search criteria. |

A.37 Installed Base Relationships Page

The following table lists and describes the user interface components on the Installed Base Relationships page.

Table A-37 Installed Base Relationships Page Components

| Component | Type | Description |
|-------------------|-----------------|--|
| Product | Read-only field | Displays the model product part number. |
| Description | Read-only field | Displays the model product description. |
| UOM | Read-only field | Displays the model product UOM. |
| Quantity | Read-only field | Displays the model product quantity. |
| Serial Number | Read-only field | Displays the model product serial number. |
| System | Read-only field | Displays the system name. |
| Search | Section | Displays the search criteria. |
| Relationship Type | Read-only field | Displays the relationship type of component. Children in a configuration have this relationship with parent component. |
| Results | Section | Displays the search results. |
| Product | Read-only field | Displays the component part number. |
| Description | Hyperlink | Linked description accesses the Installed Base Product Details window. |
| UOM | Read-only field | Displays the component UOM. |
| Quantity | Read-only field | Displays the component quantity. |
| Serial Number | Read-only field | Displays the component's serial number. |

Table A-37 Installed Base Relationships Page Components

| Component | Type | Description |
|----------------------|-----------------|---|
| System | Read-only field | Displays the system name. |
| Installed At Address | Read-only field | Displays the component's installed at address. |
| Done | Button | Returns user to the Search and Select: Installed Base page. |

A.38 Installed Base Product Details

The following table lists and describes the user interface components on the Installed Base Product Details window.

Table A-38 Installed Base Product Details Window Components

| Component | Type | Description |
|----------------------|-----------------|--|
| Product Information | Section | Displays product information. |
| Product | Read-only field | Displays the part number. |
| Description | Hyperlink | Linked description accesses the Installed Base Product Details window. |
| UOM | Read-only field | Displays the UOM. |
| Quantity | Read-only field | Displays the quantity. |
| Serial Number | Read-only field | Displays the serial number. |
| Instance Number | Read-only field | Displays the instance number. |
| System | Read-only field | Displays the system name. |
| Order Number | Read-only field | Displays the order number that contains the product. |
| Order Date | Read-only field | Displays the order date. |
| Installed At Address | Read-only field | Displays the installed at address. |
| Extended Attributes | Section | Displays all extended attributes with values for the product. |

Table A-38 Installed Base Product Details Window Components

| Component | Type | Description |
|-----------|--------|---|
| Close | Button | Closes the page and returns the user to the Search and Select: Installed Base page. |

A.39 Availability Information Page

Use the Availability Information page to check on product availability.

The table below lists and describes the user interface components on the Availability Information page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-39 Availability Information Page Components

| Component | Type | Description |
|--------------------------|------------------------------|------------------------------------|
| Done | Button | Accesses the Lines page. |
| Check Availability | Button | Accesses availability information. |
| Product | Read-only field | Displays product number. |
| Description | Read-only field | Displays product description. |
| UOM | Read-only field | Displays unit of measurement. |
| Quantity | Read-only field | Displays order quantity. |
| Need By | Text-field/ Calendar tool | Select date product needed by. |
| Availability Information | Read-only field | Displays availability information. |

See Also:

- [Section 10.7, "Checking Product Availability"](#)

A.40 Select: Service Page

Use the Select: Service page to select services for serviceable products in the current quote, in a pending order, or in the customer's Installed Base.

The following table lists and describes the user interface components on the Select: Service Page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-40 Select Service Page Components

| Component | Type | Description |
|----------------------|-----------------|---|
| Cancel | Button | See Section A.1, "Common Elements" |
| Select | Button | See Section A.1, "Common Elements" |
| Service For | Section | Section listing serviceable product information. |
| Service For | Read-only field | Displays the source of the serviceable product. Values are: Current Quote, Installed Base, or Pending Order. |
| Order Date | Read-only field | Displays the order date. Appears only if the Service For is Pending Order. |
| Order Number | Read-only field | Displays the order number. Appears only if the Service For is Pending Order. |
| Order Line Number | Read-only field | Displays the order line number for the serviceable product. Appears only if the Service For is Pending Order. |
| Product | Read-only field | Displays the serviceable product number. |
| Description | Read-only field | Displays the serviceable product description. |
| UOM | Read-only field | Displays the serviceable product UOM. |
| Quantity | Read-only field | Displays the serviceable product quantity. |
| Serial Number | Read-only field | Displays the serviceable product serial number. Appears only if the Service For is Installed Base. |
| System | Read-only field | Displays the installed base system. Appears only if the Service For is Installed Base. |
| Installed At Address | Read-only field | Displays the installed at address. Appears only if the Service For is Installed Base. |

Table A-40 Select Service Page Components

| Component | Type | Description |
|----------------------|---------------------------|--|
| Order Date | Read-only field | Displays the order date. Appears only if the Service For is Installed Base. |
| Selected Service(s) | Section | Section listing information for service(s) associated with the serviceable product. |
| Product | Read-only field | Displays service number. |
| Description | Read-only field | Displays service description. |
| Start Date | Read-only field | Displays service start date. |
| Duration | Read-only field | Displays service duration. |
| Period | Read-only field | Displays duration period. |
| Included | Read-only field | Displays a checkmark if the service is included in the price of the serviceable product. |
| Available Service(s) | Section | Section listing information for service in addition to initial price. |
| Select | Checkbox | Identifies line to be selected. |
| Product | Read-only field | Displays service product number. |
| Description | Read-only field | Displays service description. |
| Start Date | Text field/Calendar tool. | Select start date for service. |
| Duration | Text field | Enter duration period for service. |
| Period | Drop-down menu | Optionally, change the period. |
| Line Price List | Drop-down menu. | Select a price list for the service. Optional field. |

See Also:

- [Section 10.3, "Adding Services to Quotes"](#)

A.41 Modify Service Page

Use the Modify Service page to modify services.

The following table lists and describes the user interface components on the Modify Service page.

Table A-41 *Modify Service Page Components*

| Component | Type | Description |
|----------------------|-----------------|---|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Service For | Section | Section listing serviceable product information. |
| Service For | Read-only field | Displays the source (location of the serviceable product). Can be Installed Base, Pending Order, or Current Quote. |
| Order Date | Read-only field | Displays the order date for the order containing the serviceable product. Appears only if the source is Pending Order. |
| Order Number | Read-only field | Displays the order number for the order containing the serviceable product. Appears only if the source is Pending Order. |
| Order Line Number | Read-only field | Displays the order line number for the serviceable product. Appears only if the source is Pending Order. |
| Product | Read-only field | Displays serviceable product part number. |
| Description | Read-only field | Displays serviceable product description. |
| UOM | Read-only field | Displays the serviceable product UOM. |
| Quantity | Read-only field | Displays the serviceable product quantity. |
| Serial Number | Read-only field | Displays the serviceable product serial number. Appears only if the source is Installed Base. |
| System | Read-only field | Displays the Installed Base system name. Appears only if the source is Installed Base |
| Installed At Address | Read-only field | Displays the address the serviceable product is installed at. Appears only if the source is Installed Base |

Table A–41 Modify Service Page Components

| Component | Type | Description |
|-----------------|--------------------------|---|
| Order Date | Read-only field | Displays the ordered date of the serviceable product. Appears only if the source is Installed Base |
| Service Details | Section | Section listing service details. |
| Product | Read-only field | Service number. |
| Description | Read-only field | Service description. |
| Start Date | Text field/Calendar tool | Select new start date for service. Optional. |
| Duration | Text field | Enter new duration for service. |
| Period | Drop-down menu | Select new period for service. |

See Also:

- [Section 10.3, "Adding Services to Quotes"](#)
- [Section 10.3.3, "Modifying a Service"](#)

A.42 Search and Select: Related Products Page

Use the Search and Select: Related Products page to add related products from the Search and Select: Related Products page.

The following table describes the user interface components on the Search and Select: Related Products page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–42 Search and Select: Related Products Page Components

| Component | Type | Description |
|-------------|-----------------|---|
| Product | Read-only field | Displays the part number for the product to which you want to add related products. |
| Description | Read-only field | Displays the description for the product. |
| Cancel | Button | Cancels the selection and returns to the Line page. |

Table A-42 Search and Select: Related Products Page Components

| Component | Type | Description |
|-----------------|-----------------|--|
| Select | Button | Adds selected product to the quote. Appears only if there are available related products for the existing product. |
| Search | Section | Section displaying search parameters. |
| Relationship | Drop-down menu | Select relationship. Values are All (Default) and all product relationships defined during the installation. |
| Go | Button | Executes the search. |
| Results | Section | Section displaying search results. |
| Previous | Hyperlink | See Section A.1, "Common Elements" |
| Next | Hyperlink | See Section A.1, "Common Elements" |
| Select | Checkbox | Identifies the line to be selected. |
| Relationship | Read-only field | Displays the relationship type. |
| Product | Read-only field | Display the product number. |
| Description | Read-only field | Displays the product description/name. |
| UOM | Read-only field | Displays the unit of measurement. |
| Line Price List | Drop-down menu | Select value from list. Values are Null (Default) and all valid price lists for the quote's currency. Disappears if ASO: Price List Override is set to No at the appropriate level. |

See Also:

- [Section 10.6, "Adding Related Product"](#)

A.43 Adjust Pricing Page

Use the Adjust Pricing page to modify pricing information.

The following table describes the user interface components on the Adjust Pricing page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-43 Adjust Pricing Page Components

| Component | Type | Description |
|--------------------|--------------------------------|--|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Summary | Section | Section listing Pricing summary information. |
| Line Category Code | Drop-down menu/Read-only field | Select line category code from list. Values are Order (Default) and Return. Becomes read-only if ASO: Enable Line Type is set to No at the appropriate level and/or the product is a component of a configured product. |
| Line Type | Drop-down menu | Select line type from list. Values are all line types of the line category code. |
| Header Price List | Read-only field | Displays header level price list. |
| Line Price List | Drop-down menu/Read-only field | Select line prices list from list. Values are Null (Default) and all price lists for the quote currency. Becomes read-only if ASO: Price List Override is set to No at the appropriate level. |
| Agreement | Read-only field | Displays the agreement if an agreement is available for the line. |
| Commitment | Read-only field | Displays the commitment if a commitment is available for the line. |
| UOM | Drop-down menu | Select a UOM for the product. Displays all valid UOMs for the selected product. If the selected UOM is not valid for the selected Price List, an error appears. |
| Promotion Codes | Section | Section listing Promotion Code details for selection. |

Table A-43 Adjust Pricing Page Components

| Component | Type | Description |
|------------------------------|--------------------|--|
| Add Promotion Code | Button | Accesses the Search and Select: Promotion Code page. |
| Select promotion code and... | Instructional text | Outlines action to be taken in this section. |
| Delete | Button | See Section A.1, "Common Elements" |
| Select | Checkbox | Identifies the line to be selected. |
| Name | Read-only field | Displays Promotion Code name |
| Code | Read-only field | Displays Promotion Code |
| Line | Read-only field | Displays the individual list line number of the specific promotion. This value is defined in Pricing |
| Tax Details | Section | Section displaying tax information |
| Tax Code | Read-only field | Tax code for the quote line. |
| Rate | Read-only field | Tax rate for the tax code and quote line. |
| Amount | Read-only field | Tax amount for the tax code and quote line. |
| Total | Read-only field | Displays the total taxes for the quote line. |

See Also:

- [Section 7.1.3, "Pricing Adjustments"](#)

A.44 Assign Sales Credits Page

Use the Assign Sales Credit page to assign sales credit.

If Sales Credit is not specified for a Line, the Sales Credit specified for the Header is used.

The following table describes the user interface components on the Assign Sales Credit page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-44 Assign Sales Credit Page Components

| Component | Type | Description |
|----------------------|--------------------|--|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Revenue Credits | Section | Section listing revenue credit fields. |
| Add Person | Button | Accesses the Search and Select: Person page. |
| Select person and... | Instructional text | Explains action to be taken. |
| Delete | Button | Deletes selected row. |
| Select | Checkbox | Identifies the row to be selected |
| Name | Read-only field | Displays resource name. |
| Category | Read-only field | Displays resource category. |
| Sales Group | Drop-down menu | Select sales group. Values are Null and all sales groups that the resource belongs to. |
| Credit Type | Drop-down menu | Select credit type. Values are all revenue credit types. |
| Credit Percent | Text field | Enter credit percentage amount. |
| Total | Read-only field | Displays sales credit total. Must equal 100%. |
| Non-Revenue Credits | Section | Section listing non-revenue credit fields. |
| Add Person | Button | Accesses the Search and Select: Person page. |

Table A–44 Assign Sales Credit Page Components

| Component | Type | Description |
|----------------------|--------------------|--|
| Select person and... | Instructional Text | Explains the action to be taken. |
| Delete | Button | Deletes selected row. |
| Select | Checkbox | Identifies the row to be selected |
| Name | Read-only field | Displays resource name. |
| Category | Read-only field | Displays resource category. |
| Sales Group | Drop-down menu | Select sales group. Values are Null and all sales groups that the resource belongs to. |
| Credit Type | Drop-down menu | Select credit type. Values are all non-revenue credit types. |
| Credit Percent | Text field | Enter credit percentage amount. |
| Total | Read-only field | Displays credit total. |

See Also:

- [Section 10.8, "Allocating Sales Credits"](#)

A.45 Configure Page

Use this page to configure model products.

The following table describes the user interface components on the Configure page.

Table A–45 Configure Page Components

| Component | Type | Description |
|---------------|--------|---|
| Summary | Button | Accesses Configuration summary and total price. |
| Done | Button | Saves configuration. |
| Cancel | Button | Cancels configuration. |
| Configuration | Button | Accesses configuration page. Appears in the Summary page. |

See Also:

- [Section 10.4, "Configuring Products"](#)

A.46 Modify Shipping and Billing Page

Use the Modify Shipping and Billing page to modify shipping and billing information.

If the quote is not the highest version and/or you do not have update access, and/or the status is Read-only:

Apply and Revert buttons disappear, as does the instructional text attached to them.

All text fields, LOVs, and drop-down menus become Read-only fields.

If **ASO: Enable OSO Integration** is set to **Yes** at the appropriate level, customer, account, contact, and address field become hyperlinks.

The following table lists and describes the user interface elements on the Modify Shipping and Billing page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-46 Modify Shipping and Billing Page Components

| Component | Type | Description |
|-----------------|----------------|---|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Addresses | Section | Section listing address fields. |
| Shipping | Column | Lists shipping address fields. |
| Billing | Column | Section listing billing field and information. |
| Customer Name | LOV text field | Enter customer name. Accesses the Search and Select: Person page. |
| Account Number | LOV text field | Enter account number. Accesses the Search and Select: Customer page. |
| Contact Name | LOV text field | Enter contact name. Accesses the Search and Select: Customer page. |
| Address | LOV text field | Enter address. Clicking Go accesses the Search and Select: Customer page. |
| Shipping | Section | Section listing shipping fields and information. |
| Shipping Method | Drop-down menu | Select shipping method. Values are Null (default) and all shipping methods. |

Table A-46 Modify Shipping and Billing Page Components

| Component | Type | Description |
|-------------------------|---------------------------|---------------------------------|
| Requested Delivery Date | Text field/Calendar tool. | Select requested delivery date. |
| Shipping Instructions | Text field | Enter shipping instructions. |
| Packing Instructions | Text field | Enter packing instructions. |

See Also:

- [Section 9.3, "Entering Shipping and Billing Information"](#)

A.47 Split Line Page

Use the Split Line page to specify line level shipping and to split lines.

The following table describes the user interface components on the Split Line page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-47 Split Line Page Components

| Component | Type | Description |
|-------------|-----------------|--|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Product | Read-only field | Displays the product number |
| Description | Read-only field | Displays product description. |
| UOM | Read-only field | Displays unit of measurement. |
| Quantity | Read-only field | Displays quantity. |
| Split | Text fields | Enter split quantities. |
| Add Rows | Hyperlink | Adds Split rows, three at a time. |
| Go | Button | Add extra fields in Split columns. |

See Also:

- [Section 10.10, "Splitting Lines"](#)

A.48 Pricing Page

Use the Pricing page to access and edit the following types of information pricing information, including price lists, pricing agreements, currency, promotion code, tax information, and pricing date.

The following table lists and describes the user interface components on the Pricing page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-48 Pricing Page Components

| Component | Type | Description |
|------------------------------|-------------------------------|---|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Summary | Section | Section listing pricing date information. |
| Pricing Updated On | Read-only field | Displays the date and time of the last pricing request. |
| Tax Updated On | Read-only field | Displays the date and time of the last tax calculation. |
| Pricing Date | Text field/Calendar icon tool | Select a date in the future or past. This date is used for subsequent pricing calls. |
| Promotion Codes | Section | Section listing promotion code information. |
| Add Promotion Codes | Button | Accesses the Search and Select: Promotion Codes page. |
| Select Promotion code and... | Instructional Text | Explains action to be taken |
| Delete | Button | Deletes selected line. |
| Select | Checkbox | Identifies the row(s) to be selected. |
| Name | Read-only field | Displays promotion code name. |
| Code | Read-only field | Displays promotion code. |
| Line | Read-only field | Displays the individual list line number of the specific promotion. This value is defined in Pricing. |

Table A-48 Pricing Page Components

| Component | Type | Description |
|------------------|-----------------|--|
| Tax Details | Section | Section listing tax information. |
| Tax Handling | Drop-down menu | Select from list. Values are Standard (Default), Exempt, and Require. |
| Exemption Reason | Drop-down menu | Select reason for exemption from list. Values are all exemption reasons. |
| Exemption Number | Text field | Enter exemption number. |
| Tax Code | Read-only field | Displays tax code. |
| Amount | Read-only field | Displays total tax amount for the quote. |
| Total | Read-only field | Displays the total of all tax codes applied to the quote. |

See Also:

- [Section 7.1.3, "Pricing Adjustments"](#)
- [Section 7.1.1, "Price Lists"](#)
- [Section 7.1.4, "Manual Adjustments"](#)
- [Section 7.6, "Applying Pricing Agreements"](#)

A.49 Search and Select: Promotion Code Page

The following table describes the user interface components on the Search and Select: Promotion Code page.

Table A-49 Search and Select: Promotion Code Page Components

| Component | Type | Description |
|-----------|--------------------|---|
| Cancel | Button | See Section A.1, "Common Elements" |
| Select | Button | See Section A.1, "Common Elements" |
| Search | Section | Section listing search parameters. |
| Promotion | Drop-down menu/LOV | Values in drop-down menu are Name (Default) and Code. |

Table A-49 Search and Select: Promotion Code Page Components

| Component | Type | Description |
|-----------|-----------------|--|
| Go | Button | Executes search based on Promotion value and values entered in LOV text field. |
| Results | Section | Section displaying search results information. |
| Previous | Hyperlink | See Section A.1, "Common Elements" |
| Next | Hyperlink | See Section A.1, "Common Elements" |
| Select | Checkbox | Identifies the line to be selected. |
| Name | Read-only field | Displays promotion code name. |
| Code | Read-only field | Displays the promotion code. |

See Also:

- [Section 7.2, "Applying Header Promotion Codes"](#)

A.50 Shipping and Billing Page

The following table describes the user interface components on the Shipping and Billing page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-50 Shipping and Billing Page Components

| Component | Type | Description |
|---------------|------------|---|
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |
| Addresses | Section | Section listing address details. |
| Copy | Button | Select to copy the Quote To customer, contact and address information. |
| Shipping | Column | Displays shipping information. |
| Billing | Column | Displays billing information. |
| Customer Name | Text field | Searches/displays the selected value from the Search and Select: Customer page. Defaults from the Quote-To customer. |

Table A-50 Shipping and Billing Page Components

| Component | Type | Description |
|------------------|-------------|---|
| Account Number | Text field | Searches/displays the selected value from the Search and Select: Customer page. Defaults from the designated Quote To customer account, if one exists. |
| Contact | Text field | Searches/displays the selected value from the Search and Select: Customer page. |

Table A-50 Shipping and Billing Page Components

| Component | Type | Description |
|-----------|------------|--|
| Address | Text field | <p>Displays shipping or billing address. Optionally, change the defaulted addresses.</p> <p>The Ship-To and Bill-To Addresses are defaulted at the time of quote creation. Based on the following conditions, the application searches the following sources and accepts the first address it finds.</p> <p>If Ship-To Customer is an Organization and Ship-To Contact is specified:</p> <ul style="list-style-type: none"> ■ Active Primary Ship-To address type usage for Ship-To Contact ■ Identifying address for Ship-To Contact ■ Active Primary Ship-To address type usage for Ship-To Customer ■ Identifying address for Ship-To Customer <p>If Ship-To Customer is an Organization and no Ship-To Contact is specified:</p> <ul style="list-style-type: none"> ■ Active Primary Ship-To address type usage for Ship-To Customer ■ Identifying address for Ship-To Customer <p>If Bill-To Customer is an Organization and the Bill-To Contact is specified:</p> <ul style="list-style-type: none"> ■ Active Primary Bill-To address type usage for Bill-To Contact ■ Identifying address for Bill-To Contact ■ Active Primary Bill-To address type usage for Bill-To Customer ■ Identifying address for Bill-To Customer <p>If the Bill-To Customer is an Organization and no Bill-To Contact is specified:</p> <ul style="list-style-type: none"> ■ Active Primary Bill-To address type usage for Bill-To Customer ■ Identifying address for Bill-To Customer |
| Shipping | Section | Section listing shipping, delivery, and packing information. |

Table A-50 Shipping and Billing Page Components

| Component | Type | Description |
|-------------------------|--------------------------|--|
| Shipping Method | Drop-down menu | Select shipping method from list. Values are Null (Default) and all shipping methods for the product validation organization tied to the quote's operating unit. |
| Requested Delivery Date | Text field/Calendar icon | Selects/displays requested delivery date. |
| Shipping Instructions | Text field | Enter shipping instructions. |
| Packing Instructions | Text field | Enter packing instructions. |
| Payment | Section | Section listing payment information. |
| Payment Terms | Drop-down menu | Defaulted at the time of order creation (unless quote is created from an opportunity) based on: <ul style="list-style-type: none"> ■ Header-level agreement ■ Quote-To Customer Account Optionally, select a different payment term. |
| Payment Type | Drop-down menu | Select from list of types. Values are Null (Default) and all. Check Number is mandatory if Payment Type is Check. Credit Card details are mandatory if Payment Type is Credit Card. |
| PO Number | Text field | Enter purchase order number. |
| Check Number | Text field | Enter check number. |
| Credit Card Type | Drop-down menu | Select credit card type from list. Values are all credit card types. |
| Credit Card Number | Text field | Enter credit card number. |
| Cardholder Name | Text field | Enter cardholder number. |
| Credit Card Expiration | Text field/Calendar tool | Enter expiration date. |

See Also:

- [Section 9.3, "Entering Shipping and Billing Information"](#)

A.51 Sales Team Page

The following table lists and describes the user interface components on the Sales Team page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-51 Sales Team Page Components

| Component | Type | Description |
|----------------------|--------------------|---|
| Revert | Button | See Section A.1, "Common Elements" |
| Add Person | Button | Accesses the Search and Select: Person page. |
| Apply | Button | See Section A.1, "Common Elements" |
| Select person and... | Instructional Text | Explains action to be taken. |
| Delete | Button | Deletes selected line. |
| Select | Checkbox | Identifies the line to be selected. Disabled if the member is the Primary Sales Agent. |
| Name | Read-only field | Displays sales team member name |
| Job Title | Read-only field | Displays sales team member's title |
| Sales Group | Read-only field | Displays sales team member's group. |
| Phone | Read-only field | Displays sales team member's phone number. |
| Email | Read-only field | Displays sales team member's email address. |
| Full Access | Checkbox | Determines if the sales team member has Update or View Only access to the quote. |
| Keep | Checkbox | Not supported in this release. Determines if the sales team member can be replaced by automatic territory manager re-assignment. |
| Primary | Checkbox | Indicates the main sales team member assigned to the quote. Only checked for one member of the sales team. |

See Also:

- [Section 15.2, "Adding a Resource to the Quote Sales Team"](#)

A.52 Sales Credit Page

The following table describes the user interface components on the Sales Credit page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-52 Sales Credit Page Components

| Component | Type | Description |
|----------------------|--------------------|---|
| Revenue Credits | Section | Section listing revenue credits information. |
| Add Person | Button | Accesses the Search and Select: Person page. |
| Select person and... | Instructional Text | Explains action to be taken. |
| Delete | Button | Deletes selected row. |
| Select | Checkbox | Identifies the line to be selected. |
| Name | Read-only field | Displays Resource name. |
| Category | Read-only field | Displays Resource Category. |
| Sales Group | Drop-down menu | User picks sales group. Values are Null and all sales group that the resource belongs to. |
| Credit Type | Drop-down menu | Select credit type. Values are all revenue credit types. |
| Credit Percent | Text field | Enter credit percentage. |
| Total | Read-only field | Displays total. |
| Non-Revenue Credits | Section | Section listing non-revenue credits. |
| Add Person | Button | Accesses the Search and Select: Person page. |
| Select person and... | Instructional text | Identifies action to be taken after selecting person. |
| Delete | Button | Deletes selected row. |
| Select | Checkbox | Identifies the line to be selected. |

Table A–52 Sales Credit Page Components

| Component | Type | Description |
|----------------|-----------------|---|
| Name | Read-only field | Displays Resource name. |
| Category | Read-only field | Displays Resource Category. |
| Sales Group | Drop-down menu | User picks sales group. Values are Null and all sales group that the resource belongs to. |
| Credit Type | Drop-down menu | Select credit type. Values are all non-revenue credit types. |
| Credit Percent | Text field | Enter credit percentage. |
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |

See Also:

- [Section 10.8, "Allocating Sales Credits"](#)

A.53 Proposals Page

The Proposals page displays a summary of the proposals that exist for the current quote. You can also initiate the proposal creation process from this page.

The following table lists and describes the user interface components on the Proposals page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–53 Proposals Page Components

| Component | Type | Description |
|-----------------|-----------------|---|
| Create Proposal | Button | Accesses Oracle Proposals, where you can create new proposals. |
| Name | Hyperlink | Displays the Proposal name |
| Description | Read-only field | Displays the proposal description. |
| Owner | Read-only field | Displays the owner of the proposal. Defaults to the logged in user. |
| Due Date | Read-only field | Displays the due date for the proposal. |

Table A–53 Proposals Page Components

| Component | Type | Description |
|-----------|-----------------|--|
| Status | Read-only field | Displays the status of the proposal. Possible values are Draft and Final . |

A.54 Approvals Page

Use the Approvals page to:

- View approvals required for a certain quote.
- Initiate the approval process.
- View the progress of the approval process.
- Cancel the approval process.
- View the results of all submissions for approval.

The following table lists and describes the user interface components on the Approvals page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–54 Approvals Page Components

| Component | Type | Description |
|-------------------------|--------|--|
| Initiate Approval | Button | <p>Accesses the Initiate Approval page. Only appears if there is a status transition from the current status to <i>Approval Pending</i>.</p> <p>Disappears if:</p> <ul style="list-style-type: none"> ■ Quote is in Approval Pending status, OR ■ User does not have update access to the quote, OR ■ Not the highest version of the quote, OR ■ Quote is in Order Submitted status, OR ■ Quote has been submitted for batch pricing. |
| Cancel Approval Process | Button | <p>Cancels the approval process.</p> <p>Disappears if:</p> <p>Quote is not in Approval Pending status</p> <p>User does not have update access to the quote</p> <p>Not the highest version of the quote</p> |

Table A-54 Approvals Page Components

| Component | Type | Description |
|---------------|-----------------|--|
| Result | Hyperlink | Linked text displays the result of the approval process. Accesses the Approval Detail page. |
| Requester | Read-only field | Name of initiator of approval process. |
| Quote Version | Read-only field | Quote version for the approval. |
| Start Date | Read-only field | Start date (including time stamp) of the approval. |
| End Date | Read-only field | End date (including time stamp) of the approval. Field should be blank if approval process not complete. |

See Also:

- [Section 13.1, "Overview of Approvals"](#)
- [Section 13.2, "Initiating an Approval"](#)
- [Section 13.5, "Approving a Quote"](#)

A.55 Initiate Approval Page

The following table describes the user interface components on the Initiate Approval page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-55 Initiate Approval Page Components

| Component | Type | Description |
|--------------------|-----------------|---------------------------------|
| Submit | Button | Starts the approval process. |
| Approvers | Section | Section listing approvers. |
| Name | Read-only field | Name of approver. |
| Rules | Section | Section listing approval rules. |
| Rule Description | Read-only field | Displays rule description. |
| Approval | Read-only field | Displays approval level. |
| Requestor Comments | Text field | Enter comments. |

Table A-55 Initiate Approval Page Components

| Component | Type | Description |
|---|-----------------------------|---|
| Contract Options | Section | Section listing contract options. Only appears if ASO: Enable Use Contracts is set to Yes at the appropriate level. |
| Non Standard contract required for this quote | Checkbox | Select checkbox if a non-standard contract is required for this quote. |
| Approver List | Section | Determines which approvers the quote needs approval from. Disabled if ASO: Allow Skip Approvers is set to No . |
| Obtain approvals from entire list of approvers | Radio button | Select to obtain approvals from all names listed in the Approvers section at the top of the page. |
| Obtain approvals from the list of approvers starting with | Radio button/Drop-down menu | Select the radio button and select a name from the drop-down list. This person will be the first to receive the approval. |

See Also:

- [Section 13.2, "Initiating an Approval"](#)

A.56 Approval Detail Page

Use the Approval Detail page to view and modify approval details.

The following table describes the user interface components on the Approval Detail page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-56 Approval Detail Page Components

| Component | Type | Description |
|---------------------|-------------------|--|
| Done | Button | Accesses the page containing table of all approval submissions. |
| Approvers | Section | Section listing Approver information |
| Name | Read-only field | Name of approver. |
| Response | Read-only field | Response of approver. |
| Approver Comments | Note icon | Icon accesses comments of approver if comments have been submitted. Otherwise blank. |
| Notification Detail | Note icon | Icon accesses notification history if history has been submitted. Otherwise blank. |
| Rules | Section | Section listing approval rules |
| Rule Description | Read-only field | Displays rule description. |
| Approval | Read-only field | Displays approval level. |
| Requester Comments | Read-only section | Displays requester comments. |

See Also:

- [Section 13.3, "Viewing Approval Details"](#)

A.57 Approver Notification Detail Page

The following table describes the user interface components on the Approver Notification Detail page.

Table A-57 Approver Notification Detail Page Components

| Component | Type | Description |
|---------------|-----------------|---|
| Sequence | Read-only field | Displays sequence. |
| Name | Read-only field | Displays approver name. |
| Activity | Read-only field | Displays action taken by approver. |
| Date Sent | Read-only field | Displays date sent. |
| Response Date | Read-only field | Displays response date. |
| Due Date | Read-only field | Displays due date. |
| Status | Read-only field | Displays status. |
| Result | Read-only field | Displays result. |
| Done | Button | Closes the page and returns the user to Approval Detail page. |

See Also:

- [Section 13.5, "Approving a Quote"](#)

A.58 Approver Comments Page

The Approver Comments page shows any comments that the approver has submitted.

The following table describes the user interface components on the Approver Comments page.

Table A-58 Approver Comments Page Components

| Component | Type | Description |
|-------------------|-----------|------------------------------------|
| Approver Comments | Section | Section listing approver comments. |
| Comments field | Read-only | Displays approver comments. |

See Also:

- [Section 13.5, "Approving a Quote"](#)

A.59 Contracts Page

Use the Contracts page to set up contracts and to view contract information.

The following table lists and describes the user interface components on the Contracts page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–59 Contracts Page Components

| Component | Type | Description |
|-----------------------------|-----------------|---|
| Contract Template | Read-only field | Displays contract template name. |
| Review Terms and Conditions | Hyperlink | Links to contract terms and conditions. |
| Description | Read-only field | Displays contract description. |
| Modifier | Read-only field | Displays contract modifiers. |
| Version | Read-only field | Displays contract version number. |
| Request Contract Creation | Button | <p>Begins the contract creation process. Only appears if there is a status transition from the current status to <i>Contract Pending</i>.</p> <p>Disappears if:</p> <ul style="list-style-type: none"> ▪ A non-standard contract is attached to the quote OR ▪ User does not have update access OR ▪ Not the highest version of the quote, OR ▪ Quote is in Order Submitted status, OR ▪ Quote has been submitted for batch pricing. |

See Also:

- [Section 14.2, "Creating a Contract with Non Default Terms and Conditions"](#)

A.60 Request Contract Creation Page

Use the Request Contract Creation page to initiate the contract creation process.

The following table lists and describes the user interface components on the Request Contract Creation page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–60 Request Contract Creation Page Components

| Component | Type | Description |
|-------------------|-----------------|---|
| Submit | Button | Initiates the contract approval process |
| Contract Template | Read-only field | Contract template name |
| Comments | Text field | Enter comments to be reviewed during contract authoring. Text field has a 4000 character maximum limit. |

See Also:

- [Section 14.2, "Creating a Contract with Non Default Terms and Conditions"](#)

A.61 Contract Details

After initiating the contract creation procedure, the Contract details page is displayed.

The following table describes the user interface components on the Contract details. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–61 Request Contract Creation Page Two Page Components

| Component | Type | Description |
|-------------------------------|-----------------|--|
| Contract Template Information | Section | Section listing the contract template information. |
| Contract Template | Read-only field | Displays contract template name. |
| Description | Read-only field | Displays contract template description. |
| Modifier | Read-only field | Displays contract template modifier. |
| Version | Read-only field | Displays contract template version. |

Table A-61 Request Contract Creation Page Two Page Components

| Component | Type | Description |
|-----------------------------|-----------------|--|
| Contract Information | Section | Section listing the contract information. |
| Contract Number | Read-only field | Displays contract number. |
| Modifier | Read-only field | Displays contract modifier. |
| Status | Read-only field | Displays contract status. |
| Short Description | Read-only field | Displays short description of contract |
| Approval Date | Read-only field | Displays contract approval date. |
| Signature Date | Read-only field | Displays contract signature date. |
| Termination Date | Read-only field | Displays contract termination date. |
| Start Date | Read-only field | Displays contract start date. |
| End Date | Read-only field | Displays contract end date. |
| Description | Read-only field | Displays contract description. |
| Comments | Read-only field | Displays content entered in Comments field during creation. |
| Request Contract Assistance | Button | Requests contract assistance to make changes to an existing non-standard contract. Disappears if: <ul style="list-style-type: none"> ■ A non-standard contract is not attached to the quote. ■ User does not have update access to the quote ■ Not the highest version of the quote ■ Quote is in Order Submitted status ■ Quote has been submitted for batch processing |

See Also:

- [Section 14.2, "Creating a Contract with Non Default Terms and Conditions"](#)

A.62 Contract Terms and Conditions Page

The Contract Terms and Conditions page lists the text of the terms and conditions of the contract. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–62 Contract Terms and Conditions Page Components

| Component | Type | Description |
|-------------------------------|-----------------|--|
| Done | Button | Accesses the contract summary page. |
| Contract Terms and Conditions | Read-only field | List terms and conditions of contract. |

See Also:

- [Section 14.2, "Creating a Contract with Non Default Terms and Conditions"](#)

A.63 Tasks Page

Use the Tasks page to view, create, or modify tasks.

The following table lists and describes the user interface components on the Tasks page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–63 Tasks Page Components

| Component | Type | Description |
|-----------------|--------------------------|---|
| View | Drop-down menu | Select the type of tasks to view. |
| Date Range | Text field/Calendar icon | Select the start date for task date range. |
| To | Text field/Calendar icon | Select end date for task date range. |
| Type | Drop-down menu | Select task type to search for. |
| Priority | Drop-down menu | Select priority level to search for. |
| Status | Drop-down menu | Select task status to search for. |
| Include Private | Checkbox | Select this box to include private tasks in the search. |

Table A-63 Tasks Page Components

| Component | Type | Description |
|--------------------|---|---|
| Apply | Button | Executes task search. |
| Tasks Summary | Section | Section listing task summary information. |
| Update | Button | Updates task based on changes made |
| Restore | Button | Restores task to its original, saved state. |
| Create | Button | Accesses the Create Task page |
| Remove | Checkbox | Identifies line to be removed. |
| Number | Hyperlink | Displays task number. Linked text accesses the Task Details page. |
| Name | Text field/Note icon | Displays task name. Note icon accesses the Task Details page. |
| Type | Drop-down menu | Use drop-down menu to select a different task type. |
| Status | Drop-down menu | Displays task status. |
| Priority | Drop-down menu | Displays task priority. |
| Planned Start Date | Text field/Calendar tool/Drop-down menu | Enter a different start date for task. |
| Planned End Date | Text field/Calendar tool/Drop-down menu | Enter a different end date for task. |
| Owner Type | Drop-down menu | Select a different owner type. |
| Owner | LOV | Enter a different owner name. |
| Go | Button | Accesses the LOV Renderer pop-up window. |

See Also:

- [Section 16.1, "Overview of Notes, Tasks, and Attachments"](#)
- [Section 16.4, "Creating a Task"](#)
- [Section 16.5, "Searching for Tasks"](#)
- [Section 16.6, "Modifying a Task"](#)

A.64 Sales Supplement Page

Use the Sales Supplement page to access templates that allow you to capture additional quote-specific information. For more information on header level fields, see [Section A.1, "Common Elements"](#).

The following table lists and describes the user interface components on the Sales Supplement page.

Table A–64 Sales Supplement Page Components

| Component | Type | Description |
|-----------|----------------|--|
| Template | Drop-down menu | Select template from list. Page refreshes after template selection, displaying user interface elements based on selected template. |
| View | Drop-down menu | Displays the section in which to enter information. Lists all sections defined for the selected template. |
| Go | Button | Accesses the selected section. |
| Revert | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |

A.65 Notes Page

Use the Notes page to view, modify, and create Notes.

The following table lists and describes the user interface components on the Notes page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–65 Notes Page Components

| Component | Type | Description |
|----------------------------|----------------|---|
| Type | Drop-down menu | Select note type. |
| Show Notes for Last...Days | Text field | Enter amount of days for which you want to view notes. |
| Apply | Button | Executes note search. |
| Create | Button | Accesses the Create Note page. |
| All Notes | Button | Accesses the All Notes View page, displaying all Notes. |

Table A–65 Notes Page Components

| Component | Type | Description |
|------------|-----------------|------------------------------------|
| Date | Read-only field | Displays Note creation date. |
| Created By | Read-only field | Displays name of Note creator. |
| Type | Read-only field | Displays note type. |
| Status | Read-only field | Displays note status. |
| Note | Hyperlink | Links to Note Details page. |
| Text | Read-only field | Displays text of note. |
| Attachment | Gif | Accesses attached file(s), if any. |

See Also:

- [Section 16.1, "Overview of Notes, Tasks, and Attachments"](#)
- [Section 16.2, "Adding Notes to a Quote"](#)
- [Section 16.3, "Searching for Notes"](#)

A.66 Attachments Page

Use the Attachments page to attach files to a quote, and to view attached file information.

The following table lists and describes the user interface components on the Attachments page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A–66 Attachments Page Components

| Component | Type | Description |
|--------------------------|--------------------|---|
| Add Attachment | Button | Accesses the Add Attachments page. |
| Select attachment and... | Instructional text | Identifies the action to be taken after selecting attachment. |
| Delete | Button | See Section A.1, "Common Elements" |
| Select | Checkbox | Identifies selected line. |
| Attachment | Hyperlink | Linked file name opens attached file. |

Table A-66 Attachments Page Components

| Component | Type | Description |
|---------------|-----------------|---|
| Created By | Read-only field | Displays user name. |
| Creation Date | Read-only field | Displays date file was attached to quote. |
| Description | Read-only field | Displays description of attachment. Defined during the attach file process. |

See Also:

- [Section 16.8, "Creating an Attachment"](#)
- [Section 16.9, "Viewing an Attachment"](#)

A.67 Add Attachments Page

Use the Add Attachments page to attach and associate files to a quote.

The following table lists and describes the user interface components on the Add Attachments page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-67 Add Attachments Page Components

| Component | Type | Description |
|-------------|------------|--|
| File | Text field | Displays file name and path after attached. |
| Browse | Button | Accesses the Choose File window. Browse for file. |
| Description | Text field | Enter description of file. |
| Cancel | Button | See Section A.1, "Common Elements" |
| Apply | Button | See Section A.1, "Common Elements" |

See Also:

- [Section 16.8, "Creating an Attachment"](#)

A.68 Versions Page

Use the Versions page to view and modify version information. Only the highest quote version number can be modified. To modify a prior version, save it as a new version.

The following table lists and describes the user interface components on the Versions page. For more information on header level fields, see [Section A.1, "Common Elements"](#).

Table A-68 *Versions Page Components*

| Component | Type | Description |
|----------------|-----------------|--|
| Version Number | Hyperlink | Linked text displays version number. Links to quote overview page. |
| Created By | Read-only field | Displays username of person who created the version. |
| Creation Date | Read-only field | Displays version creation date. |
| Updated By | Read-only field | Displays username of updater. |
| Update Date | Read-only field | Displays update date. |
| Status | Read-only field | Displays quote version status. |
| Amount | Read-only field | Displays quote amount. |

See Also:

- [Section 3.5, "Creating a New Version of a Quote"](#)

A.69 Order Details Page

Use the Order Details page to view detailed order information.

The following table lists and describes the user interface components on the Order Details page.

Table A-69 Order Details Page Components

| Component | Type | Description |
|-------------------------|-----------------|--------------------------------------|
| Order Number | Read-only field | Displays order number. |
| Reference Number | Read-only field | Displays reference number. |
| Web Confirmation Number | Read-only field | Displays web confirmation number. |
| PO Number | Read-only field | Displays purchase order number. |
| Customer Name | Read-only field | Displays customer name. |
| Line Total | Read-only field | Displays total amount for line. |
| Total Charges | Read-only field | Displays total charges. |
| Tax Total | Read-only field | Displays tax total. |
| Order Total | Read-only field | Displays total amount for order. |
| Shipment Priority | Read-only field | Displays shipment priority. |
| Payment Terms | Read-only field | Displays payment terms. |
| Freight Terms | Read-only field | Displays freight terms. |
| Date Ordered | Read-only field | Displays order date. |
| Booked Date | Read-only field | Displays booked date. |
| Order Status | Read-only field | Displays order status. |
| Payment Type | Read-only field | Displays payment type. |
| Shipments | Hyperlink | Text links to Shipment Details page. |
| Shipping Address | Read-only field | Displays shipping address. |
| Billing Address | Read-only field | Displays billing address. |

Table A-69 Order Details Page Components

| Component | Type | Description |
|--------------------|-----------------|---|
| Part Number | Read-only field | Displays part number. |
| Product | Read-only field | Displays product. |
| Qty Ordered | Read-only field | Displays quantity ordered. |
| Unit Selling Price | Read-only field | Displays unit selling price. |
| Unit Of Measure | Read-only field | Displays unit of measurement (UOM). |
| Line Total | Read-only field | Displays total amount for line equivalent to products plus tax. |
| Promise Date | Read-only field | Displays the promise date for the line. |
| Schedule Ship Date | Read-only field | Displays the scheduled ship date for the line. |
| Order Line Status | Read-only field | Displays the order line status. |
| Shipments | Hyperlink | Text links to Shipment Details page. |

- [Section 18.2, "Placing an Order"](#)

Oracle Quoting Forms User Interface Reference

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

- [Oracle Quoting Form](#)
- [Quote Header Tab > Summary View](#)
- [Quote Header Tab > Addresses View](#)
- [Quote Header Tab > Payment, Shipping View](#)
- [Quote Header Tab > Tax View](#)
- [Header Actions Menu](#)
- [Quote Lines Tab > Pricing View](#)
- [Product Details Form](#)
- [Quote Lines Tab > Bill To View](#)
- [Address Details Form](#)
- [Quote Lines Tab > Ship To View](#)
- [Quote Line Tab > Shipping View](#)
- [Quote Lines Tab > Service View](#)
- [Line Actions Menu](#)
- [Quote Versions Tab](#)

-
- Price Quote Form
 - Related Products Form
 - Service Reference Form
 - Approvals Form
 - Initiate Approval Form
 - Sales Credits Form
 - Available to Promise (ATP) Form
 - Contract Detail Information Form
 - Contract Detail Form
 - Contract Terms & Conditions Form
 - Copy Quote Form
 - Price Adjustment Form
 - Pricing Request Details Form
 - Printing Page
 - Promotions/Pricing Attributes Form
 - Sales Team Form
 - Service Items Form
 - Split Lines Form
 - Tax Details Form
 - Publish Form
 - Customer History Form
 - Quote, Customer Search Form > Quote View
 - Quote, Customer Search Form > Organization View
 - Quote, Customer Search Form > Person View
 - Create Quote From Opportunity Form
 - Order Confirmation Form
 - Quote Status Setup
 - Sales Supplement Setup

B.1 Oracle Quoting Form

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

The following table describes components on the main Oracle Quoting form.

Table B-1 Oracle Quoting Form Components

| Component | Type | Description |
|--------------|-----------------|--|
| Quote Name | Text field | View and modify the quote name. The quote name defaults to Quote for <Quote To Customer> if not specified during quote creation. Optional field. |
| Customer | LOV text field | Search for the name of the Quote To customer. This is the name of the organization or of the organization's representative. The user can enter the name in the text field or click on the search button to search for the name. Cannot be changed once the quote is created. Mandatory field. Note: If ASO: Auto Account Creation is set to Always and the party does not have an account then the account will be created when the quote is created. If set to As Required , the account will be created at the time of web publishing, initiation of a non-standard contract or order conversion. If set to Place Order an account will be created at order conversion. If ASO: View Customers Without Accounts is set to Yes , the LOV shows all parties with or without accounts. If set to No , the LOV shows only parties with accounts. |
| Contact | LOV text field | Search for the Quote to customer contact. The LOV displays all parties of type Person with a valid party relationship with the quote-to customer. Disabled if the Quote To customer type is Person . Optional field. |
| Quote Number | Read-only field | Displays the quote number. The quote number is a concatenation of the quote and version numbers. Note: If ASO: Automatic Numbering is set to Yes , Oracle Quoting automatically assigns a number to the quote. If set to No , the user must enter a value in this field. |

Table B-1 Oracle Quoting Form Components(Cont.)

| Component | Type | Description |
|------------------|----------------|--|
| Account | LOV text field | <p>Select the account number for the quote-to customer. The LOV displays accounts for the designated customer if the customer field contains a value.</p> <p>If the customer field is blank, the Account LOV displays all active parties with an active account that matches the account number entered.</p> <p>The account must be selected if the Quote to customer has at least one active account.</p> <p>NOTE: If ASO: Auto Account Creation is set to Always and the party does not have an account, then the account will be created when the quote is created. If set to As Required, the account will be created at the time of web publishing, initiation of a non-standard contract and order conversion. If set to Place Order an account will be created at order conversion.</p> |
| Quote Status | LOV text field | <p>Displays the quote status. When a new quote is created, it is automatically populated by Oracle Quoting according to the profile option ASO: Default Quote Status. Use the LOV to change the quote status manually.</p> <p>Mandatory field.</p> |
| Version | Read-only | Displays the quote version. |
| Pricing Status | Read-only | Displays the status of pricing calculations for the quote. |
| Tax Status | Read-only | Displays the status of tax calculations for the quote. |
| | Flexfield | |
| Quote Header | Tab | Displays quote header level information. |
| Quote Lines | Tab | Displays quote line level information. |
| Quote Versions | Tab | Displays quote version history. |
| Actions | Button | Accesses the Actions menu. |
| Configure | Button | Launches Configurator, where users configure model products. |
| Price Quote | Button | Accesses the Price Quote form, where the user initiates pricing and tax calculations for the lines. |

Table B–1 Oracle Quoting Form Components(Cont.)

| Component | Type | Description |
|-------------|--------|--|
| Place Order | Button | Submits the quote to Oracle Order Management. If submission is successful, user receives a confirmation number and can track the order in Order Management. If the submission fails, the user receives an error message. |

See Also:

- [Section 20.1, "Overview of Creating Quotes"](#)

B.2 Quote Header Tab > Summary View

The Quote Header tab > Summary view provides an overview of the criteria selected for the quote.

The following table describes components on the Quote Header tab > Summary view.

Table B–2 Quote Header Tab > Summary View Components

| Component | Type | Description |
|------------|-----------------|---|
| Expires On | Read-only field | Displays the quote expiration date. |
| Order Type | LOV field | Displays the order type. If you change order type, and there are quote lines with line category codes that are not valid under the new order type, the change will not be allowed. |
| Agreement | LOV text field | Displays the agreement pertaining to the Quote To customer. If Quote To customer is changed, agreement will be cleared. If agreement is changed, then it must be reapplied to the quote. |

Table B-2 Quote Header Tab > Summary View Components

| Component | Type | Description |
|--------------------|-----------------|--|
| Price List | LOV text field | <p>Displays the applied price list for the quote. The applied price list selection is based on the defaulting sequence of header level agreement, Quote To customer and then order type. If either the header level agreement, Quote To customer, order type or currency is changed then the defaulting logic for the price list is reapplied.</p> <p>If no price list is found during reapplication, the prior price list, if any should be cleared.</p> <p>The user can select a price list for the currency if ASO: Price List Override is set to Yes at the appropriate level.</p> |
| Currency | LOV text field | <p>Displays the applied currency. The applied currency selection is based on the profile option ASO: Default Currency Code.</p> |
| Pricing Date | Read-only field | <p>Displays the effective date of the quote pricing. Freeze Price will set the pricing date to the current date. Unfreeze Price will clear the pricing date.</p> <p>Defaults to the current date if no pricing date is selected.</p> <p>Pricing date may also change if user has update access, the quote is at the highest version, and quote status is not read-only.</p> |
| Contract Template | LOV text field | <p>Enter or select a contract template.</p> <p>Enabled if ASO: Enable Use Contracts is set to Yes at the appropriate level. Defaults to the contract template specified in OKC: Contract Template for standard terms and conditions at the appropriate level.</p> <p>Becomes read-only if a contract is attached to the quote.</p> |
| Contract Number | Read-only field | <p>Displays the contract number associated with the quote.</p> |
| Pricing Updated On | Read-only field | <p>Displays the date and time of the last pricing call.</p> |
| Pricing Status | Read-only field | <p>Displays status of the pricing calculation.</p> |
| Order Number | Read-only field | <p>Displays the order number if the quote has been successfully submitted as an order.</p> |

Table B-2 Quote Header Tab > Summary View Components

| Component | Type | Description |
|------------------|-----------------|---|
| Salesperson | LOV text field | Enter or select the primary salesperson on the quote. Mandatory field. |
| Sales Group | LOV text field | Enter or select the salesgroup associated with the primary salesperson on the quote. |
| Opportunity | LOV text field | Enter or select an opportunity to associate with the quote. Can be updated if the user has Update access, quote is at the highest version, and quote status is not read-only. |
| Sales Channel | LOV text field | Enter or select a sales channel and description. Defaults to sales channel designated in opportunity if created from one. Can be updated if the user has Update access, quote is at the highest version, and quote status is not read-only. |
| Source Name | LOV text field | Enter or select source name, code and type. Can be updated if the user has Update access, the quote is at the highest version, and quote status is not read-only. If quote is created from an opportunity, the source name is copied over from the opportunity and can be changed. If the source name in the opportunity is subsequently changed, it will not be updated in the quote. |
| Published | Read-only field | Set to No when the quote is created or if the quote has not been web- or un-web published. Set to Yes when the quote has been web-published. |
| Creation Date | Read-only field | Displays the quote creation date. |
| Pricing Request | Read-only field | Displays the pricing request number if the quote was submitted for batch processing. |
| Tax Updated On | Read-only field | Displays the date of the last tax calculation. |
| Tax Status | Read-only field | Displays the status of the tax calculation. |
| List | Read-only field | Displays the total list price. |
| Adjustment | Read-only field | Displays the total adjustment. |
| Selling | Read-only field | Displays the total net (selling) price. |

Table B–2 Quote Header Tab > Summary View Components

| Component | Type | Description |
|-------------|-----------------|---|
| Tax | Read-only field | Displays the total tax for the quote. Should be blank if the tax has not yet been computed for the quote. |
| Charges | Read-only field | Displays the total charges for the quote, including freight and other applicable charges setup in Oracle Pricing. |
| Quote Total | Read-only field | Displays the quote total. |

See Also:

- [Section 20.1, "Overview of Creating Quotes"](#)

B.3 Quote Header Tab > Addresses View

The Quote Header tab > Addresses view provides Quote To, Bill To, and Ship To customer, contact and address information.

The following table describes components on the Quote Header tab > Addresses view.

Table B–3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|-----------|-----------------|---|
| Quote To | Region | Area where information regarding the Quote To customer is located. |
| Customer | Read-only field | Displays the Quote To customer. |
| Account | Read-only field | Displays the Quote To account. |
| Contact | Read-only field | Displays the Customer contact name. Disabled if Quote To customer type is Person . |
| Phone | LOV text field | Enter or select phone number. Displays phone numbers associated with the Quote To customer contact if the Quote To customer type is Organization and Quote To contact is specified. Displays phone number associated with Quote To customer if Quote To customer type is Person . Disabled if Quote To customer type is Organization and Quote To contact is unspecified. |

Table B-3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|--------------------|-----------------|--|
| Address | LOV text field | <p>Enter or select the Quote To address which is the address to which the quote will be mailed.</p> <p>Optional field.</p> <p>If Quote To party is Organization and Quote To contact is specified, defaults in the following order: primary Sold To address for Quote To contact, identifying address for Quote To contact, primary Sold To address for Quote To customer, and identifying address for Quote To customer.</p> <p>If Quote To party is Organization and Quote To contact is not specified, defaults in the following order: primary Sold To address for Quote To customer, and identifying address for Quote To customer.</p> <p>If Quote To party is Person, defaults in the following order: primary Sold To address for the Quote To customer, and identifying address for the Quote To customer.</p> |
| Oval Button | Button | Accesses the Quote To address details. |
| City | Read-only field | Displays the Quote To city. |
| State | Read-only field | Displays the Quote To state. |
| Postal Code | Read-only field | Displays the Quote To postal code. |
| County | Read-only field | Displays the Quote To county. |
| Province | Read-only field | Displays the Quote To province. |
| Country | Read-only field | Displays the Quote To country. |
| Bill To | Region | Area where information regarding Bill To customer is located. |
| Copy From Quote To | Button | Copies information from the Quote To information to the corresponding Bill To fields for customer type (hidden), customer, account, contact and address. |

Table B-3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|------------------|----------------|--|
| Customer | LOV text field | <p>Enter or select the Bill To customer for the quote.</p> <p>If ASO: Auto Account Creation is set to Always and the party does not have an account then the account will be created when the quote is created/saved.</p> <p>If ASO: Enforce Account Relationships is set to No and ASO: View Customers Without Accounts is set to Yes, the LOV will list active parties of type Person and Organization that match the entered text.</p> <p>If ASO: Enforce Account Relationship is set to No and ASO: View Customers Without Accounts is set to No, the LOV will list active parties of type Person and Organization with active accounts and match the text entered.</p> <p>If ASO: Enforce Account Relationships is set to Yes, the LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the text entered.</p> <p>ASO: View Customers Without Accounts settings help determine the appearance of the Quote To customer in the LOV. The LOV shows customer name, account number and customer type.</p> |
| Account | LOV text field | <p>Enter or select the Bill To account for the quote.</p> <p>If customer is entered, LOV lists active account for the customer matching the account number entered.</p> <p>If customer is blank and ASO: Enforce Account Relationships is set to No, LOV lists active parties of type Person and Organization that have active accounts and match the account number entered.</p> <p>If customer is blank and ASO: Enforce Account Relationships is set to Yes, LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the account number entered.</p> <p>The LOV shows account number, account description, customer name, and customer type.</p> |

Table B-3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|--------------------|-----------------|---|
| Contact | LOV text field | Enter or select the customer contact name on the quote. Disabled if Bill To customer type is Person . LOV lists all active parties of type Person that have a party relationship with the Bill To customer. LOV lists contact name, address lines 1 - 4, city, state, postal code, county, province, and country. |
| Address | LOV text field | Enter or select the Bill To address, which is the physical location where the invoice will be sent. Optional field. If Bill to party type is Organization and Bill To contact is not specified, defaults in the following order: primary active Bill To address for the Bill To contact, identifying address for the Bill To contact, primary active Bill To address for Bill To customer, and identifying address for the Bill To customer. |
| Oval Button | Button | Accesses the Bill To address details. |
| City | Read-only field | Displays the Bill To city. |
| State | Read-only field | Displays the Bill To state. |
| Postal Code | Read-only field | Displays the Bill To postal code. |
| County | Read-only field | Displays the Bill To county. |
| Province | Read-only field | Displays the Bill To province. |
| Country | Read-only field | Displays the Bill To country. |
| Ship To | Section | Area where information regarding Ship To customer is located. |
| Copy From Quote To | Button | Copies information from the Quote To information to the corresponding Ship To fields for customer type (hidden), customer, account, contact and address. |

Table B-3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|-----------|----------------|--|
| Customer | LOV text field | <p>Enter or select the Ship To customer for the quote.</p> <p>If ASO: Auto Account Creation is set to Always and the party does not have an account then the account will be created when the quote is created/saved.</p> <p>If ASO: Enforce Account Relationships is set to No and ASO: View Customers Without Accounts is set to Yes, the LOV will list active parties of type Person and Organization that match the entered text.</p> <p>If ASO: Enforce Account Relationship is set to No and ASO: View Customers Without Accounts is set to No, the LOV will list active parties of type Person and Organization with active accounts and match the text entered.</p> <p>If ASO: Enforce Account Relationships is set to Yes, the LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the text entered.</p> <p>ASO: View Customers Without Accounts settings help determine the appearance of the Quote To customer in the LOV. The LOV shows customer name, account number and customer type.</p> |

Table B-3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|-----------|----------------|---|
| Account | LOV text field | <p>Enter or select the Ship To Account for the quote.</p> <p>Mandatory if Ship To customer has an active account when the Ship To customer was specified.</p> <p>If Ship To customer is specified and ASO: Auto Account Creation is set to Always, Ship To account will be created when the quote is created/saved.</p> <p>If customer is entered, LOV lists active account for the customer matching the account number entered.</p> <p>If customer is blank and ASO: Enforce Account Relationships is set to No, LOV lists active parties of type Person and Organization with active accounts and match the account number entered.</p> <p>If customer is blank and ASO: Enforce Account Relationships is set to Yes, LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the account number entered.</p> <p>The LOV shows account number, account description, customer name, and customer type.</p> |
| Contact | LOV text field | <p>Enter or select the customer contact name for the quote.</p> <p>Disabled if Ship To customer type is Person.</p> <p>LOV lists all active parties of type Person that have a party relationship with the Ship To customer.</p> <p>LOV also lists contact name, address lines 1 - 4, city, state, postal code, county, province, and country.</p> |

Table B-3 Quote Header Tab > Addresses View Components

| Component | Type | Description |
|-------------|-----------------|---|
| Address | LOV text field | <p>Enter or select the Ship To address, which is the physical location where goods and services will be sent.</p> <p>LOV shows all addresses for the Ship To customer and shows address lines 1 - 4, city, state, postal code, county, province, country, primary flag, party site usage and customer name. Lists addresses for the contact followed by those for the customer.</p> <p>If Ship To party type is Organization and Ship To contact is specified, defaults in the following order: primary active Ship To address for the Ship To contact, identifying address for the Ship To contact, primary active Ship To address for the Ship To customer, and identifying address for the Ship To customer.</p> <p>If Ship To party type is Organization and Ship To contact is not specified, defaults to primary active Ship To address for the Ship To customer, and identifying address for the Ship To customer.</p> <p>If Ship To party type is Person, defaults in the following order: primary active Ship To address for the Ship To customer and identifying address for the Ship To customer.</p> |
| Oval Button | Button | Accesses the Ship To address details. |
| City | Read-only field | Displays the Ship To city. |
| State | Read-only field | Displays the Ship To state. |
| Postal Code | Read-only field | Displays the Ship To postal code. |
| County | Read-only field | Displays the Ship To county. |
| Province | Read-only field | Displays the Ship To province. |
| Country | Read-only field | Displays the Ship To country. |

See Also:

- [Section 25.3, "Entering Billing Information"](#)
- [Section 25.4, "Entering Shipping Information"](#)
- [Section 25.5, "Entering Quote-to Address"](#)

B.4 Quote Header Tab > Payment, Shipping View

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

The following table describes the components on the Quote Header tab > Payment, Shipping view.

Table B-4 Quote Header Tab > Payment, Shipping View Components

| Component | Type | Description |
|-----------------|----------------|--|
| Payment Details | Section | Area where quote payment information is located. |
| Payment Terms | LOV text field | <p>Displays the payment terms for the quote.</p> <p>The defaulting sequence for applying the payment terms is: header level agreement and Quote To customer account.</p> <p>If header level agreement or Quote To customer account is changed, then payment terms should be reapplied.</p> <p>Can be updated if the user has Update access, the quote is the highest version, and not in Ordered status.</p> |
| PO Number | Text field | <p>Enter the purchase order number for the quote.</p> <p>Can be updated if user has Update access, quote is in the highest version, and quote is not in Ordered status.</p> |
| Payment Type | Drop down list | <p>Select one of the following payment types: cash, check, credit card, or blank. Choosing a payment type here activates the payment tab fields required by the given payment type.</p> <p>Can be updated if user has Update access, quote is in the highest version and quote is not in Ordered status.</p> |
| Check Number | Text field | <p>Enter the check number for the quote. Mandatory if payment type is set to Check.</p> <p>Can be updated if user has Update access, quote is in the highest version, and quote is not in Ordered status.</p> |

Table B-4 Quote Header Tab > Payment, Shipping View Components (Cont.)

| Component | Type | Description |
|-----------------------------|----------------|--|
| Credit Card Type | Drop down list | Select a credit card type. This menu is active only if payment type is set to Credit Card . |
| Credit Card Number | Text field | Enter the credit card number for the quote. Mandatory if payment type is set to Credit Card . Can be updated if user has Update access, quote is in the highest version, and quote is not in Ordered status. |
| Cardholder Name | Text field | Enter the name of the person who owns the credit card to which the order will be charged. Mandatory if payment type is set to Credit Card . Can be updated if user has Update access, quote is in the highest version, and quote is not in Ordered status. |
| Credit Card Expiration Date | Text field | Enter the expiration date of the credit card to which the order will be charged. Mandatory if payment type is set to Credit Card . Can be updated if user has Update access, quote is in the highest version, and quote is not in Ordered status. |
| Shipping Details | Section | Area where shipping detail information for the quote is located. |
| Requested Date | Date field | Enter the requested delivery date. Can be the ship date or the receive date. A date prior to the current date cannot be entered. |
| Shipping Method | LOV text field | Enter the shipping method. The LOV shows shipping methods and descriptions. The shipping methods are valid and active shipping methods for the product validation organization for the operating unit associated with the quote. |
| Shipment Priority | LOV text field | Enter the priority level shipping. |
| Freight Terms | LOV text field | Enter the freight terms for shipping. |
| FOB | LOV text field | Enter the Freight-On-Board (FOB) point or location from where ownership title of goods is transferred from seller to buyer. |
| Shipping Instructions | Text field | Enter any special shipping instructions. |

Table B–4 Quote Header Tab > Payment, Shipping View Components (Cont.)

| Component | Type | Description |
|----------------------|------------|---|
| Packing Instructions | Text field | Enter any special packing instructions. |

See Also:

- [Section 25.9, "Entering Header Shipping Details"](#)
- [Section 25.10, "Entering Header Payment Information"](#)

B.5 Quote Header Tab > Tax View

Use the Quote Header Tab > Tax View to designate the tax handling information for an order.

The following table describes the components on the Quote Header Tab > Tax View.

Table B–5 Quote Header Tab > Tax View Components

| Component | Type | Description |
|---------------|----------------|--|
| Tax Handling | Drop Down List | <p>Select a tax handling option for the current quote. The LOV displays three options: Exempt, Require, or Standard. Select Exempt to indicate that the quote is exempt for a normally taxable customer site.</p> <p>Select Require to indicate that the quote is taxable for a normally non-taxable ship-to customer.</p> <p>Select Standard if the taxation should be based on existing exemption rules.</p> |
| Exempt Reason | Text field | <p>If there is no exempt reason designated for the selected or entered exempt number, select a reason from the LOV. If an exempt number is selected, the corresponding exempt reason automatically populates this field.</p> <p>Required if the tax handling value is Exempt.</p> <p>Active only if you select Exempt in the tax handling field.</p> |
| Exempt Number | LOV text field | <p>Select a tax certificate number from the LOV or enter a new tax certificate number. Active only if you select Exempt in the tax handling field.</p> |

Table B-5 Quote Header Tab > Tax View Components

| Component | Type | Description |
|-----------|-----------------|--|
| Tax Code | Read-only field | Displays the tax details for the quote. Each tax code on the quote is listed on a separate line. |
| Amount | Read-only field | Displays total tax amount for the tax code. |
| Total | Read-only field | Displays total tax amount for the quote and the summation of the tax amount lines. |

See Also:

- [Section 26.14, "Viewing Quote Tax Details"](#)

B.6 Header Actions Menu

From the Quoting Form, users can select **Actions** to access the Actions menu.

The following table describes the components on the Header Level Actions menu.

Table B-6 Header Actions Menu Components

| Component | Type | Description |
|----------------------|--------------|---|
| Find | Text field | Search criteria for the actions. Enter full action name or partial name and a wildcard. |
| Action | Column Title | Displays the available actions. |
| Approvals | Action | Accesses the approvals form where the user can initiate an approval chain. Only visible if ASO: Enable Approvals is set to Yes at the appropriate level. |
| Assign Sales Credits | Action | Accesses the header level Sales Credits form. |

Table B-6 Header Actions Menu Components

| Component | Type | Description |
|------------------------|-------------|--|
| Cancel Pricing Request | Action | <p>Cancels an in-progress pricing request.</p> <p>Not visible if the user does not have Update access, the quote is not in the highest version, the quote is in read-only status, or the quote has not been created, ASO: Enable Batch Processing is not set to Yes, or the quote is not submitted for batch pricing.</p> |
| Check Availability | Action | Accesses the ATP form. |
| Contract | Action | <p>Accesses the Contracts form.</p> <p>Not visible if ASO: Enable Use Contracts is set to No.</p> |
| Copy Quote | Action | Accesses the Copy Quote form, where the user can copy an existing quote. |
| Enter Customer | Action | <p>Accesses AR Customer Standard form, where the user creates a new customer.</p> <p>If ASO: Create New Customer is set to No, the AR Customer standard form is in read-only mode.</p> |

Table B-6 Header Actions Menu Components

| Component | Type | Description |
|-----------------------|-------------|---|
| Freeze Prices | Action | <p>Freezes the price on the quote and copies the current date to the pricing date field.</p> <p>Is not visible if the user does not have Update access to the quote, the quote is not in the highest version, the quote is in a status that is read-only, the pricing date is specified, or the quote is submitted for batch pricing.</p> |
| Initiate Credit Check | Action | <p>Activates a credit check by Order Management.</p> <p>Is not visible if user does not have Update access to the quote, if quote is not in the highest version, if ASO: Enable Credit Check is set to No at the appropriate level, if the quote is in Order Submitted status or if the quote is submitted for batch pricing.</p> |
| Price Adjustment | Action | <p>Accesses the form where the user makes pricing adjustments to quote lines.</p> |

Table B-6 Header Actions Menu Components

| Component | Type | Description |
|-------------------------------|-------------|---|
| Pricing Request Details | Action | <p>Accesses the Pricing Request Details form, where the user views pricing request details.</p> <p>Is not visible if the user does not have Update access to the quote, if the quote is not in the highest version, if the quote is in a read-only status, ASO: Enable Batch Processing is not set to Yes, quote is not submitted for batch pricing, and last pricing request is in Pending, Inactive or Running status.</p> |
| Print Quote | Action | <p>Accesses the Printing form where the user prints the existing quote.</p> <p>Is not visible if the quote is not in the highest version, or if the quote is submitted for batch pricing.</p> |
| Promotions/Pricing Attributes | Action | Accesses the form where the user enters promotion codes and other pricing attributes. |
| Sales Team | Action | Accesses the Sales Team form. |

Table B-6 Header Actions Menu Components

| Component | Type | Description |
|---------------------|-------------|---|
| Unfreeze Prices | Action | <p>Unfreezes the prices on the quote and clears the pricing date field.</p> <p>Is not visible if the user does not have Update access to the quote, the quote is not in the highest version, the quote is in a status that is read-only, the pricing date is specified, or the quote is submitted for batch pricing.</p> |
| View Notes | Action | Accesses the Notes form. |
| Web Publish Quote | Action | <p>Accesses the Publish form.</p> <p>Is not visible if ASO: Enable Web Publishing is set to No at the appropriate level, if the quote is in Order Submitted or Inactive statuses, if a contact is not specified, if the quote is submitted for batch pricing, or if the quote is already web published.</p> |
| Web Unpublish Quote | Action | <p>Unpublishes the quote.</p> <p>Is not visible if user does not have Update access, quote is not in the highest version, ASO: Enable Web Publishing is set to No at the appropriate level, the quote is not web-published, the quote is not in Order Submitted or Inactive statuses, or the quote is submitted for batch pricing.</p> |
| OK | Button | Closes the Actions menu and navigates to the selected form. |

Table B-6 Header Actions Menu Components

| Component | Type | Description |
|-----------|--------|--|
| Cancel | Button | Closes the Actions menu. |
| Find | Button | Filters the list based on the text entered in the Find text field. |

B.7 Quote Lines Tab > Pricing View

Use the Quote Lines tab > Pricing view to view and modify products in the current quote, or to add products to the quote.

The following table describes the components on the Quote Lines tab > Pricing view of the Oracle Quoting form.

Table B-7 Quote Lines Tab > Pricing View Components

| Component | Type | Description |
|--------------|-----------------|--|
| Folder Icon | Button | Accesses private and public folders created by user. |
| Line | Read-only field | Displays the position of the line in the quote. |
| Model Status | Read-only field | Set to blank if the product is not a model or a component of the model. Set to I for the model product and its components if the model is incomplete, or if the model product is not configured. |
| Product | LOV Text field | Displays the part number for the product. Read-only if the line is a component of a configured product, the quote has been saved, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status. LOV displays product, descriptions, UOM, service duration, duration period. |
| Qty | Text field | Displays the line level quantity. Read-only if user does not have Update access and/or quote is not in the highest version. |

Table B-7 Quote Lines Tab > Pricing View Components(Cont.)

| Component | Type | Description |
|-------------------------------|-----------------------|--|
| UOM | LOV Text field | Displays the line level unit of measure. Read-only if user does not have Update access, quote is not in the highest version, quote is in read-only status, product is a model product and the quote line has been saved, and/or product is a component of a model product. |
| Price List | LOV text field | Displays the line level price list. Header level price list is not defaulted to the line level price list, but will be used for pricing purposes if the line level price list is blank. Read-only if user does not have Update access, ASO: Price List Override is set to Yes at the appropriate level, quote is not in the highest version, and/or the quote is in a read-only status. |
| Unit List Price | Read-only field | Displays the list price of the product. |
| Unit Adjustment | Read-only field | Displays the unit adjustment to be made to the list price. |
| Unit % Adjustment | Read-only field | Displays the unit % adjustment to be made to the list price. |
| Unit Selling Price | Text field | Displays the unit selling price after the unit adjustment has been made. |
| Total Price | Read-only field | Displays the total selling price of the product. |
| Lines: additional information | Descriptive flexfield | Displays the Lines: Additional Information form, where the user accesses color and context value information. |
| Details | Section | Area where additional information for each line is located. |
| Description | Read-only field | Displays the product short description from Oracle Inventory. |
| Oval Button | Button | Accesses the Product Detail form. |
| Line Total | Read-only field | Displays the sum of the total price values for the top level model product and its components, otherwise displays the total line level product price. |
| Quote Total | Read-only field | Displays the total price of the quote, based on the quote lines, taxes and shipping charges. Matches the quote total in the Quote Header tab, Summary view. |

Table B-7 Quote Lines Tab > Pricing View Components(Cont.)

| Component | Type | Description |
|-------------------|-----------------|---|
| Line Category | LOV text field | <p>Displays the line category.</p> <p>Mandatory field. The user can choose either Order or Return. Defaults to Order for basic products, services, and for serviceable products with one or more services associated to them.</p> <p>Read-only if the line is a component of a configured product, ASO: Enable Line Type is set to No at the appropriate level, user does not have Update access, quote is not in the highest version, and/or quote is in read-only status.</p> |
| Line Type | LOV text field | <p>Displays the line type corresponding to the line category.</p> <p>Read-only if the line is a component of a configured product, ASO: Enable Line Type is set to No at the appropriate level, quote is not the highest version and/or quote is in read-only status.</p> |
| Header Price List | Read-only field | Displays the header level price list. |
| Agreement | Read-only field | Displays the current agreement. |
| Commitment | Read-only field | Displays the current commitment. |
| Attributes | Button | Displays the Pricing Attributes form, which is the same as the Pricing Attributes tab of the Pricing/Promotions form, where the user selects the pricing attribute context to apply to the quote. |

See Also:

- [Section 26.2, "Adding Products to the Quote"](#)
- [Section 26.3, "Removing Products from the Quote"](#)

B.8 Product Details Form

Use the Product Details Form to obtain additional status information on products in the quote. This form is accessed by clicking on the oval button located next to the Description field on the **Quote Lines tab > Pricing view**, **Quote Lines tab > Bill To view**, or **Quote Lines tab > Service view**.

The following table describes the components on the Product Details form.

Table B-8 Product Details Form Components

| Component | Type | Description |
|---------------------|--------------------|--|
| BOM Item Type | Read-only field | Displays the BOM item type of the product. |
| Inventory Item Type | Read-only field | Displays the inventory item type of the product. |
| Configurable | Read-only checkbox | Indicates whether the product is configurable or not. Checked if the product is configurable, otherwise blank. |
| Returnable | Read-only checkbox | Indicates whether the product is returnable or not. Checked if the product is returnable, otherwise blank. |
| Serviceable | Read-only checkbox | Indicates whether the product is serviceable or not. Checked if the product is serviceable, otherwise blank. |
| Shippable | Read-only checkbox | Indicates whether the product is shippable or not. Checked if the product is shippable, otherwise blank. |
| Support Service | Read-only checkbox | Indicates whether the product is a support service or not. Checked if the product is a support service, otherwise blank. |
| OK | Button | Returns user to the previous form. |

B.9 Quote Lines Tab > Bill To View

Use the Quote Lines tab > Bill To view to enter Bill To information about each line in the quote.

The following table describes the components on the Quote Lines tab > Bill to view.

Table B-9 Quote Lines Tab > Bill to View Components

| Component | Type | Description |
|------------------|-----------------|---|
| Folder Icon | Button | Accesses private and public folders created by user. |
| Line | Read-only field | Displays the position of the line in the quote. |
| Model Status | Read-only field | Set to blank if the product is not a model or a component of the model. Set to I for the model product and its components if the model is incomplete, or if the model product is not configured. |

Table B–9 Quote Lines Tab > Bill to View Components

| Component | Type | Description |
|------------------|----------------|---|
| Product | LOV text field | <p>Displays the part number for the product.</p> <p>Read-only if the line is a component of a configured product, the quote has been saved, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> <p>LOV displays product, descriptions, UOM, service duration, duration period.</p> |
| Qty | Text field | <p>Displays the quantity of the product in this quote line.</p> <p>Mandatory field.</p> <p>Read-only if user does not have Update access and/or quote is not in the highest version.</p> |
| Customer | LOV text field | <p>Displays the Bill To customer for the product line.</p> <p>If ASO: Auto Account Creation is set to Always and the party does not have an account then the account will be created when the quote is created/saved.</p> <p>If ASO: Enforce Account Relationships is set to No and ASO: View Customers Without Accounts is set to Yes, the LOV will list active parties of type Person and Organization that match the entered text.</p> <p>If ASO: Enforce Account Relationship is set to No and ASO: View Customers Without Accounts is set to No, the LOV will list active parties of type Person and Organization that have active accounts and match the text entered.</p> <p>If ASO: Enforce Account Relationships is set to Yes, the LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the text entered.</p> <p>ASO: View Customers Without Accounts settings help determine the appearance of the Quote To customer in the LOV. The LOV shows customer name, account number and customer type.</p> <p>Read-only if the line is a component of a configured product, ASO: Enable Line Level Billing is set to No at the appropriate level, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |

Table B-9 Quote Lines Tab > Bill to View Components

| Component | Type | Description |
|------------------|----------------|---|
| Account | LOV text field | <p>Displays the Bill To account on the quote. Mandatory if the Bill To customer had an active account when the Bill To customer was specified. If the Bill To customer is specified and ASO: Auto Account Creation is set to Always then the Bill To account will be created when the quote is created/saved.</p> <p>If customer is entered, LOV lists active account for the customer matching the account number entered.</p> <p>If customer is blank and ASO: Enforce Account Relationships is set to No, LOV lists active parties of type Person and Organization with active accounts and match the account number entered.</p> <p>If Customer is blank and ASO: Enforce Account Relationships is set to Yes, LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the account number entered.</p> <p>Read-only if the line is a component of a configured product, ASO: Enable Line Level Billing is set to No at the appropriate level, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |
| Contact | LOV text field | <p>Displays the contact for the Bill To customer for the product line.</p> <p>Disabled if Bill To customer type is Person.</p> <p>LOV lists all active parties of type Person that have a party relationship with the Bill To customer. Also shows the existing contact address for the contact. LOV lists contact name, address Lines 1 - 4, city, state, postal code, county, province, and country.</p> <p>Read-only if the line is a component of a configured product, ASO: Enable Line Level Billing is set to No at the appropriate level, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |

Table B-9 Quote Lines Tab > Bill to View Components

| Component | Type | Description |
|-------------|-----------------|--|
| Address | LOV text field | Displays the Bill To address, which is the physical location where the invoice will be sent. Read-only if the line is a component of a configured product, ASO: Enable Line Level Billing is set to No at the appropriate level, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status. |
| Details | Section | Area where additional information for each line is located. |
| Description | Read-only field | Displays the short description of the product from Oracle Inventory. |
| Oval Button | Button | Accesses the Product Detail form. |
| Line Total | Read-only field | Displays the sum of the total price values for the top level model product and its components, otherwise displays the total price value for the product in the quote line. |
| Quote Total | Read-only field | Displays the total price of the quote, based on the quote lines, taxes and shipping charges. Matches the quote total in the Quote Header tab, Summary view. |
| Address | Read-only field | The Bill To address. |
| Oval Button | Button | Accesses the Address Details form. |
| City | Read-only field | The Bill To city. |
| State | Read-only field | The Bill To state. |
| Postal Code | Read-only field | The Bill To postal code. |
| County | Read-only field | The Bill To county. |
| Province | Read-only field | The Bill To province. |
| Country | Read-only field | The Bill To country. |

See Also:

- [Section 25.6, "Entering Line-level Billing"](#)

B.10 Address Details Form

Use the Address Details form to access additional Address information. There is an Address Details Bill To form and an Address Details Ship To form, which have identical components. The Address Details Bill To form is accessible from the oval button in the Details section of the Quote Lines tab > Bill To View form. The Address Details Ship To form is accessible from the oval button in the Details section of the Quote Lines tab > Ship To View form. The Address Details Quote To form is accessible from the oval button in the Customer Information section of the Create Quote From Opportunity form.

The following table describes the components on the Address Details Form.

Table B-10 Address Details Form Components

| Component | Type | Description |
|------------------|-----------------|---|
| Address Name | Read-only field | The party site name. |
| Address 1 | Read-only field | Address line 1. |
| Address 2 | Read-only field | Address line 2. |
| Address 3 | Read-only field | Address line 3. |
| Address 4 | Read-only field | Address line 4. |
| Address Phonetic | Read-only field | The phonetic pronunciation of the address. |
| PO Box | Read-only field | The PO box of the address. |
| Suite | Read-only field | The address suite. |
| City | Read-only field | The address city. |
| State | Read-only field | The address state. |
| Postal Code | Read-only field | The address postal code. |
| County | Read-only field | The address county. |
| Province | Read-only field | The address province. |
| Country | Read-only field | The address country. |
| Timezone | Read-only field | The address timezone. |
| OK | Button | Returns user to the original form on the Quote Lines tab. |

B.11 Quote Lines Tab > Ship To View

Use the Quote Lines tab > Ship To view to enter Ship To information about each line in the quote.

The following table describes the components on the Quote Lines tab > Ship To view form.

Table B-11 *Quote Lines Tab > Ship to View Components*

| Component | Type | Description |
|--------------|-----------------|---|
| Folder Icon | Button | Accesses private and public folders created by user. |
| Line | Read-only field | Displays the position of the line in the quote. |
| Model Status | Read-only field | Set to blank if the product is not a model or a component of the model. Set to I for the model product and its components if the model is incomplete, or if the model product is not configured. |
| Product | LOV text field | Displays the part number for the product. Read-only if the line is a component of a configured product, the quote has been saved, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status. LOV displays product, descriptions, UOM, service duration, duration period. |
| Qty | Text field | Displays the quantity of the product in this quote line. Mandatory field. Read-only if user does not have Update access and/or quote is not in the highest version. |

Table B-11 Quote Lines Tab > Ship to View Components

| Component | Type | Description |
|-----------|----------------|---|
| Customer | LOV text field | <p>Displays the Ship To customer for the product line.</p> <p>If ASO: Auto Account Creation is set to Always and the party does not have an account then the account will be created when the quote is created/saved.</p> <p>If ASO: Enforce Account Relationships is set to No and ASO: View Customers Without Accounts is set to Yes, the LOV will list active parties of type Person and Organization that match the entered text.</p> <p>If ASO: Enforce Account Relationship is set to No and ASO: view Customers Without Accounts is set to No, the LOV will list active parties of type Person and Organization that have active accounts and match the text entered.</p> <p>If ASO: Enforce Account Relationships is set to Yes, the LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the text entered.</p> <p>ASO: View Customers Without Accounts settings help determine the appearance of the Quote To Customer in the LOV. The LOV shows customer name, account number and customer type.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |

Table B–11 Quote Lines Tab > Ship to View Components

| Component | Type | Description |
|------------------|----------------|---|
| Account | LOV text field | <p>Displays the Ship To account for the product line.</p> <p>Mandatory if the Ship To customer had an active account when the Ship To customer was specified. If the Ship To customer is specified and ASO: Auto Account Creation is set to Always then the Ship To account will be created when the quote is created/saved.</p> <p>If customer is entered, LOV lists active account for the customer matching the account number entered.</p> <p>If customer is blank and ASO: Enforce Account Relationships is set to No, LOV lists active parties of type Person and Organization that have active accounts and match the account number entered.</p> <p>If Customer is blank and ASO: Enforce Account Relationships is set to Yes, LOV lists active parties of type Person and Organization with active accounts, having an account relationship with the Quote To customer account and match the account number entered.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |
| Contact | LOV text field | <p>Displays the contact for the Ship To customer for the product line.</p> <p>Disabled if Ship To customer type is Person.</p> <p>LOV lists all active parties of type Person that have a party relationship with the Ship To customer. Also shows the address for the contact if it exists. LOV lists contact name, address lines 1 - 4, city, state, postal code, county, province, and country.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |

Table B-11 Quote Lines Tab > Ship to View Components

| Component | Type | Description |
|------------------|-----------------|---|
| Address | LOV text field | Displays the Ship To address, which is the physical location where the goods and services will be sent. Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status. |
| Details | Section | Area where additional information for each line is located. |
| Description | Read-only field | Displays the product short description from Oracle Inventory. |
| Oval Button | Button | Accesses the Product Detail form. |
| Line Total | Read-only field | Displays the sum of the total price values for the top level model product and its components, otherwise displays the total price value for the product in the quote line. |
| Quote Total | Read-only field | Displays the total price of the quote, based on the quote lines, taxes and shipping charges. Matches the quote total in the Quote Header tab, Summary view. |
| Address | Read-only field | The Ship To address. |
| Oval Button | Button | Accesses the Address Details form, which includes: address name, address lines 1 -4, address phonetic, PO box, suite, city, state, postal code, county, province, country, and timezone. |
| City | Read-only field | The Ship to city. |
| State | Read-only field | The Ship to state. |
| Postal Code | Read-only field | The Ship to postal code. |
| County | Read-only field | The Ship to county. |
| Province | Read-only field | The Ship to province. |
| Country | Read-only field | The Ship to country. |

See Also:

- [Section 25.7, "Entering Line-Level Shipping"](#)

B.12 Quote Line Tab > Shipping View

Use the Quote Lines tab > Shipping view to enter Shipping details about each line in the quote.

The following table describes the components on the Quote Lines tab > Shipping view.

Table B-12 Quote Lines Tab > Shipping View Components

| Component | Type | Description |
|----------------|-----------------|---|
| Folder Icon | Button | Accesses private and public folders created by user. |
| Line | Read-only field | Displays the position of the line in the quote. |
| Model Status | Read-only field | Set to blank if the product is not a model or a component of the model. Set to I for the model product and its components if the model is incomplete, or if the model product is not configured. |
| Product | LOV Text field | Displays the part number for the product. Read-only if the line is a component of a configured product, the quote has been saved, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status. LOV displays product, descriptions, UOM, service duration, duration period. |
| Qty | Text field | Displays the quantity of the product in this quote line. Mandatory field. Read-only if user does not have Update access and/or quote is not in the highest version. |
| Requested Date | Date field | Displays the requested delivery date. The date requested can be either the shipped or received date. Read-only if the user does not have Update access, quote is not in the highest version, and/or the quote is in a read-only status. |

Table B-12 Quote Lines Tab > Shipping View Components

| Component | Type | Description |
|-------------------|-----------------|--|
| Warehouse | LOV text field | <p>Displays the ship from warehouse.</p> <p>Read-only if the user does not have Update access, quote is not in the highest version, and/or the quote is in a read-only status.</p> <p>Disabled if ASO: Enable Manual Warehouse Selection is set to No.</p> |
| Shipping Method | LOV text field | <p>Select the shipping method you want for the product. You can select from high or standard priority.</p> <p>If warehouse is specified, shipping method is validated against the carrier-ship method relationships for the warehouse specified on the quote line.</p> <p>If warehouse is not specified, shipping method is validated against the carrier-ship method relationships for the inventory organization for the product on the quote line.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, quote is in a read-only status.</p> |
| Shipment Priority | LOV text field | <p>Enter or select the shipment priority for the product.</p> <p>Read-only if the line is a component for a configured product, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status.</p> |
| FOB | LOV text field | Enter or select the Freight on Board (FOB) point for the product. |
| Details | Section | Area where additional information for each line is located. |
| Description | Read-only field | Displays the product short description from Oracle Inventory. |
| Oval Button | Button | Accesses the Product Detail form. |
| Line Total | Read-only field | Displays the sum of the total price values for the top level model product and its components, otherwise displays the total price value for the product in the quote line. |

Table B–12 Quote Lines Tab > Shipping View Components

| Component | Type | Description |
|-----------------------|-----------------|---|
| Quote Total | Read-only field | Displays the total price of the quote, based on the quote lines, taxes and shipping charges. Matches the quote total in the Quote Header tab, Summary view. |
| Freight Terms | LOV text field | <p>Enter or select the freight terms for the product, indicating who pays for freight and when they are paid, for the product line. Freight terms do not affect accounting freight charges.</p> <p>LOV lists all freight terms available in the OM Lookup FREIGHT_TERMS. See the <i>Oracle Order Management Suite Implementation Guide</i> for more information.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, the quote is not in the highest version, or the quote is in a read-only status.</p> |
| Shipping Instructions | Text field | <p>Enter any special shipping instructions for the product.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, and/or the quote is in a read-only status.</p> |
| Packing Instructions | Text field | <p>Enter any special packing instructions for the product.</p> <p>Read-only if the line is a component of a configured product, user does not have Update access, quote is not in the highest version, and/or the quote is in a read-only status.</p> |

See Also:

- [Section 25.8, "Entering Line Level Shipping Details"](#)

B.13 Quote Lines Tab > Service View

Use the Quote Lines tab > Service view to add service products to the quote.

The following table describes the components on the Quote Lines tab > Service view.

Table B-13 Quote Lines Tab > Service View Components

| Component | Type | Description |
|------------------|-----------------|--|
| Folder Icon | Button | Accesses private and public folders created by user. |
| Line | Read-only field | Displays the position of the line in the quote. |
| Model Status | Read-only field | Set to blank if the product is not a model or a component of the model. Set to I for the model product and its components if the model is incomplete, or if the model product is not configured. |
| Product | LOV text field | Displays the part number for the product. Read-only if the line is a component of a configured product, the quote has been saved, user does not have Update access, quote is not in the highest version, and/or quote is in a read-only status. LOV displays product, descriptions, UOM, service duration, duration period. |
| Qty | Numeric field | Displays the quantity of the product in this quote line. Mandatory field. Read-only if user does not have Update access, quote is not in the highest version, and/or the line is a service. |
| Reference Type | Read-only field | Displays the source for the serviceable product: Current Quote, Pending Order or Installed Base . Set to Unspecified if serviceable product reference has not been specified. |
| Duration | Numeric field | Displays the duration of the service product. Defaults from the values defined in Inventory for the service. Mandatory field. |
| Period | Text field | Displays the period for the service product. Defaults from the values defined in Inventory for the service. Mandatory field. |
| Start Date | Date field | Displays the start date for the service product. Defaults to the current date. Mandatory field. |
| Details | Section | Area where additional information for each line is located. |

Table B-13 Quote Lines Tab > Service View Components

| Component | Type | Description |
|------------------|-----------------|--|
| Description | Read-only field | Displays the short description of the product from Oracle Inventory. |
| Oval Button | Button | Accesses the Product Detail form. |
| Line Total | Read-only field | Displays the sum of the total price values for the top level model product and its components, otherwise displays the total price value for the product in the quote line. |
| Quote Total | Read-only field | Displays the total price of the quote, based on the quote lines, taxes and shipping charges. Matches the quote total in the Quote Header tab, Summary view. |
| Ref Product | Read-only field | Displays the part number of the serviceable product. |
| Desc | Read-only field | Displays the description for the serviceable product. |
| UOM | Read-only field | Displays the UOM of the serviceable product. |
| Qty | Read-only field | Displays the quantity of serviceable product. |
| Order Num | Read-only field | Displays the order number for the serviceable product. Valid if reference type is Pending Order or Installed Base . |
| System | Read-only field | Displays the system name and description for the serviceable product. Valid if reference type is Pending Order or Installed Base . |
| Serial Num | Read-only field | Displays the serial number for the serviceable product. Valid if reference type is Installed Base . |
| Order Line | Read-only field | Displays the order line number for the serviceable product. Valid if reference type is Pending Order or Installed Base . |
| Order Date | Read-only field | Displays the order date for the serviceable product. Valid if reference type is Pending Order or Installed Base . |
| Quote Line | Read-only field | Displays the quote line number for the serviceable product. |
| Reference | Button | Accesses the Service Reference form. Enabled only if the product is a service. |

See Also:

- [Section 26.4, "Adding a Service to the Quote"](#)

B.14 Line Actions Menu

Use the Line Actions menu to perform actions on a selected quote line.

The following table describes the components on the Line Actions menu.

Table B-14 *Line Actions Menu Components*

| Component | Type | Description |
|----------------------------------|--------------|--|
| Find | Text field | Search criteria for the actions. Enter full action name or partial name and a wildcard. |
| Action | Column Title | Displays the available actions. |
| Add Related Products | Action | Accesses the Related Products form. Is not visible if the user does not have Update access, the quote is not in the highest version, the quote is in a read-only status, the product is a trade-in product, or the quote is submitted for batch pricing. |
| Add Service to Previous Purchase | Action | Accesses the Service Reference form, where the user purchases services for a previously purchased product. Is not visible if the user does not have Update access, the quote is not in the highest version, the quote is in a read-only status, or the quote is submitted for batch pricing. |

Table B-14 Line Actions Menu Components

| Component | Type | Description |
|------------------------|-------------|--|
| Approvals | Action | <p>Accesses the Approvals form where the user initiates an approval chain.</p> <p>Is not visible if ASO: Enable Approvals is not set to Yes at the appropriate level.</p> |
| Assign Sales Credits | Action | <p>Accesses the Line Level Sales Credits form.</p> |
| Cancel Pricing Request | Action | <p>Cancels an in progress pricing report.</p> <p>Is not visible if the user does not have Update access, the quote is not in the highest version, the quote is in read-only status, the quote has not been created, ASO: Enable Batch Processing is not set to Yes, or the quote is not submitted for batch pricing.</p> |
| Check Availability | Action | <p>Accesses the form where the user checks product availability.</p> <p>Is not visible if the line is a trade-in.</p> |
| Configure | Action | <p>Launches Oracle Configurator.</p> <p>Is not visible if user does not have Update access to the quote, quote is not in the highest version, quote is in a read-only status, current context is not the Quote Lines tab, current context is not a top level model product on the Quote Lines tab, or quote is submitted for batch pricing.</p> |

Table B-14 Line Actions Menu Components

| Component | Type | Description |
|------------------|-------------|--|
| Contract | Action | <p>Accesses the Contracts form.</p> <p>Is not visible if ASO: Enable Use Contracts is set to No.</p> |
| Copy Quote | Action | <p>Accesses the Copy Quote form, where the user copies the existing quote.</p> |
| Duplicate Line | Action | <p>Duplicates the selected line and adds it to the quote.</p> <p>Is not visible if the user does not have Update access to the quote, if the quote is in a read-only status, if the quote line has not been saved, if the product is a service product, a trade-in product, a model component or if the quote is submitted for batch pricing.</p> |
| Enter Customer | Action | <p>Accesses Oracle Receivables Find/Enter Customers form.</p> <p>In read-only mode If ASO: Create New Customer is set to No.</p> |
| Freeze Prices | Action | <p>Freezes prices on the quote and copies the current date to the Pricing Date field.</p> <p>Is not visible if the user does not have Update access to the quote, the quote is not in the highest version, the quote is in a status that is read-only, the pricing date is specified, or the quote is submitted for batch pricing.</p> |

Table B-14 Line Actions Menu Components

| Component | Type | Description |
|-----------------------|-------------|--|
| Initiate Credit Check | Action | <p>Activates a credit check by Order Management on the customer.</p> <p>Is not visible if the user does not have Update access to the quote, the quote is not the highest version, or has not been created, if ASO: Enable Credit Check is set to No at the appropriate level, if the quote is in Order Submitted status or if the quote is submitted for batch pricing.</p> |
| Installation Details | Action | <p>Accesses the Installation Details form.</p> <p>Disappears if the user does not have Update access, the quote is not in the highest version, the quote is in a read-only status, the Network Logistics Trackable flag is set to No for the product, or if the quote is submitted for batch pricing.</p> |
| Price Adjustment | Action | <p>Accesses the form where the user makes line-level pricing adjustments.</p> |

Table B-14 Line Actions Menu Components

| Component | Type | Description |
|-------------------------------|-------------|--|
| Pricing Request Details | Action | <p>Accesses the Pricing Request Details form, where the user views details of a pricing request.</p> <p>Is not visible if the user does not have Update access to the quote, if the quote is not in the highest version, if the quote is in a read-only status, ASO: Enable Batch Processing is not set to Yes, quote is submitted for batch pricing, and last pricing request is in Pending, Inactive or Running status.</p> |
| Print Quote | Action | <p>Accesses the form where the user prints the existing quote.</p> <p>Is not visible if the quote is not in the highest version, or if the quote is submitted for batch pricing.</p> |
| Product Search | Action | <p>Disappears if user does not have Update access to the quote, the quote is not in the highest version, the quote is in a read-only status, or the quote is submitted for batch pricing.</p> |
| Promotions/Pricing Attributes | Action | <p>Accesses the form where the user enters promotion code and other pricing attributes.</p> |
| Sales Team | Action | <p>Accesses the form where the user views and modifies the appropriate sales team for the quote.</p> |

Table B-14 Line Actions Menu Components

| Component | Type | Description |
|------------------|-------------|--|
| Service Items | Action | <p>Accesses the Service Item form, where the user adds available services to products in the quote.</p> <p>Is not visible if the quote line has not been saved, the product is not a serviceable product, or the product is a trade-in product.</p> |
| Split Line | Action | <p>Accesses the Split Line form where the user splits the quantity of a line into separate lines.</p> <p>Is not visible if the user does not have Update access to the quote, the quote is not in the highest version, the quote is in a read-only status, the quote line has not been saved, the product is a service product, the product is a trade-in product, the product is a model component, or the quote is submitted for batch pricing.</p> |
| Tax Details | Action | <p>Accesses the Tax Details form where the user sees a line breakdown of applied taxes.</p> |

Table B-14 Line Actions Menu Components

| Component | Type | Description |
|-------------------|-------------|--|
| Unfreeze Prices | Action | <p>Unfreezes the prices on the quote and clears the pricing date field.</p> <p>Is not visible if the user does not have Update access to the quote, the quote is not in the highest version, the quote is in a status that is read-only, the pricing date is specified, or the quote is submitted for batch pricing.</p> |
| View Notes | Action | <p>Accesses the form where the user views any notes created for the quote.</p> |
| Web Publish Quote | Action | <p>Accesses the Publish form where the user publishes the quote to a web store.</p> <p>Is not visible if the user does not have Update access to the quote, if the quote is not in the highest version, if ASO: Enable Web Publishing is set to No at the appropriate level, if the quote is web published, if the quote is in Order Submitted or Inactive statuses, if the quote is submitted for batch pricing, or if the quote has not been created.</p> |

Table B–14 Line Actions Menu Components

| Component | Type | Description |
|---------------------|--------|---|
| Web Unpublish Quote | Action | Unpublishes the quote. Is not visible if the user does not have Update access to the quote, if the quote is not in the highest version, if ASO: Enable Web Publishing is set to No at the appropriate level, if the quote is not web published, if the quote is not in Order Submitted or Inactive status, or if the quote is submitted for batch pricing. |
| OK | Button | Closes the form and navigates to the functionality for the selected product. |
| Cancel | Button | Closes the form and returns user to the calling form. |
| Find | Button | Filters the list based on the text entered in the Find text field. |

B.15 Quote Versions Tab

Use the Quote Versions tab to view different versions of the quote.

The following table describes the components on the Quote Versions tab of the Quoting form.

Table B–15 Quote Versions Tab Components

| Component | Type | Description |
|----------------|---------------|---|
| Version Number | Column Header | Lists the quote version number. |
| Status | Column Header | Lists the quote status for the version. |
| Amount | Column Header | Lists the amount for the quote version. |

Table B–15 Quote Versions Tab Components

| Component | Type | Description |
|------------------|---------------|---|
| Currency | Column Header | Lists the currency for the quote version. |
| Creation Date | Column Header | Lists the creation date of the quote version. |
| Update Date | Column Header | Lists the update dates of the quote version. |
| Created By | Column Header | Lists the person who created the quote version. |
| Updated By | Column Header | Lists the person who updated the quote version. |
| View (K) | Button | Takes user to the Quote Header tab, Summary view of the quote version selected. |

See Also:

- [Section 26.15, "Viewing the Quote Versions"](#)

B.16 Price Quote Form

From the Quoting form, users can select **Price Quote** to initiate a pricing and tax calculation request. The page is not available if:

- **ASO: Calculate Price** is set to **Automatic**
- **ASO: Calculate Tax** is set to **Automatic**
- **ASO: Enable Batch Processing** is set to **No**

The following table describes the components on the Price Quote form.

Table B–16 Price Quote Form Components

| Component | Type | Description |
|------------------|-----------------|---|
| Pricing Status | Read-only field | Displays the pricing calculation status of the quote. Set to Incomplete if the quote has not been fully priced and a price affecting change is made to the quote. Set to Complete if quote is fully priced. |
| Tax Status | Read-only field | Displays the tax calculation status of the quote. |
| Compute Options | Section | Select to chose calculation options. Defaults to Both . |
| Price Only | Radio Button | Select to perform pricing calculations only. |

Table B–16 Price Quote Form Components

| Component | Type | Description |
|--|--------------|--|
| Tax Only | Radio Button | Select to perform tax calculations only. |
| Both | Radio Button | Select to perform both pricing and tax calculations. |
| Submission Options | Section | Select to chose submission options. Defaults to Price Now . |
| Now | Radio Button | Select to perform a pricing call immediately after selecting the Submit button. |
| Submit pricing request and notify me when it is complete | Radio Button | Select to perform a pricing call via batch processing. After selecting the Submit button, user is taken to a calling form. An informational message containing the request ID is displayed after request submission. Disabled if ASO: Enable Batch Processing is set to No , or the user does not have Update access, or the quote is not in the highest version, or the last pricing request is not complete. |
| Submit | Button | If Price Now is selected, the price and/or tax calculations are initiated immediately. User waits until the request completes to view the calculations. If Submit pricing request and notify is selected, user is taken to calling form after request is submitted. An informational message containing the request ID is displayed after request submission. |
| Cancel | Button | Closes the Price Quote form and returns user to the original form. |

See Also:

- [Section 23.2, "Executing Manual Pricing and Tax Requests for a Quote"](#)
- [Section 23.2.1, "Viewing Details of the Pricing Request"](#)
- [Section 23.2.2, "Canceling a Pricing Request"](#)

B.17 Related Products Form

Use the Related Products form, from the Quote Lines tab Actions menu, to cross-sell, up-sell, or substitute a product.

The following table describes the components on the Related Products form.

Table B–17 Related Products Form Components

| Component | Type | Description |
|------------------|-----------------|---|
| Line | Read-only field | Displays the line number for which you are selecting related products. |
| Product | Read-only field | Displays the number of the original product that has related products. |
| Description | Read-only field | Displays the name of the original product. |
| Currency | Read-only field | Displays the currency in which the original product is priced. |
| UOM | Read-only field | Displays the UOM for the original product. |
| Quantity | Read-only field | Displays the product quantity of the original product. |
| List Price | Read-only field | Displays the list price of the original product. |
| Selling Price | Read-only field | Displays the selling price of the original product. |
| Product | Column header | Displays the part numbers that are related to the original product. |
| Description | Column header | Displays the names of products that are related to the original product. |
| Relationship | Column header | Displays the relationship of the related product to the original product: cross-sell, up-sell, or substitute. |
| UOM | Column header | Displays the UOM of the related products. |
| Apply | Button | Adds the related product to the quote and returns user to the Quote Lines tab. |
| Cancel | Button | Cancels your changes and returns user to the Quote Lines tab. |

See Also:

- [Section 26.8, "Adding a Related Product"](#)

B.18 Service Reference Form

Use the Add Service to Previous Purchase action to access service reference details for a service product.

The following table describes the components on the Service Reference form.

Table B-18 Service Reference Form Components

| Component | Type | Description |
|------------------------------------|----------------|--|
| Search for Serviceable Product In: | LOV field | Select the object to which the service is applied. The service can apply to a product on a quote, or an order, or to a product already installed at a customer site. Mandatory field. If this form was invoked via the Reference button in the Quote Lines tab, Service view form, then the LOV field contains Current Quote, Pending Orders and Installed Base . If this form was invoked via the Add Service to Previous Purchase action in the Quote Header tab, then the LOV field contains Pending Order and Installed Base . |
| Current Quote | LOV | Select the Current Quote LOV to search for serviceable products in current quotes. |
| Product | LOV text field | Enter or select a serviceable product by which to search. |
| Description | LOV text field | Enter or select a serviceable product description by which to search. |
| Search | Button | Executes the search and displays the results. |
| Close | Button | Closes the form and returns user to the Quote Lines tab. |
| Clear | Button | Clears all of the fields in the form. |
| Results | Section | Area of the form that displays the results of the search. |
| Quote Line | Column Header | Displays the quote line number for the serviceable product. |
| Product | Column Header | Displays the product number for the serviceable product. |
| Description | Column Header | Displays the descriptions for the serviceable product. |
| UOM | Column Header | Displays the UOM for the serviceable product. |
| Quantity | Column Header | Displays the quantity for the serviceable product. |

Table B-18 Service Reference Form Components

| Component | Type | Description |
|------------------|-----------------|--|
| Apply | Button | Closes the form, passes the selected serviceable product information to the quote and returns user to the Quoting form. |
| Installed Base | LOV | Select the Installed Base LOV to search for serviceable products in the customer's installed base. |
| Serial Number | Text field | Enter the serial number by which to search. |
| System Name | Text field | Enter the system name by which to search. System names are groupings of related products that are defined and maintained in Installed Base . |
| Order Number | Text field | Enter the order number by which to search. |
| Product | LOV text field | Enter or select the part number by which to search. |
| Description | LOV text field | Enter or select the product description by which to search. |
| Order Dates | LOV text fields | Enter a date range within which the order was created. |
| Search | Button | Executes the search and displays the results. |
| Close | Button | Closes the form and returns user to the previous form. |
| Clear | Button | Clears all of the fields in the form. |
| Results | Section | Displays the results of the search. |
| System Name | Column Header | Displays the system name for the serviceable product. |
| Order Number | Column Header | Displays the order number for the serviceable product. |
| Product | Column Header | Displays the serviceable product number. |
| Description | Column Header | Displays the serviceable product description. |
| UOM | Column Header | Displays the UOM for the serviceable product. |
| Quantity | Column Header | Displays the quantity for the serviceable product. |

Table B-18 Service Reference Form Components

| Component | Type | Description |
|----------------------|----------------|---|
| Order Date | Column Header | Displays the order date for the serviceable product. |
| Serial Number | Column Header | Displays the serial number for the serviceable product. |
| Installed at Address | Column Header | Displays the installed at address for the serviceable product. |
| Apply | Button | If this form was invoked via the Reference button in the Quote Lines tab, Service view form, it applies the changes to the quote and returns user to the original form. |
| Find Service For... | Button | If this form was invoked via the Add Service to Previous Purchase action in the Quote Header tab, it closes the form, passes the serviceable product information to the Service Item form, and goes to the Service Item form. |
| Pending Orders | LOV | Select the Pending Orders LOV to search for serviceable products in orders that are not yet fulfilled. |
| Order Number | Text field | Enter an order number by which to search for a serviceable product. |
| System Name | Text field | Enter a system name by which to search. System names are groupings of related products that are defined and maintained in Installed Base . |
| Product | LOV text field | Enter or select the part number by which to search. |
| Description | LOV text field | Enter or select the description by which to search. |
| Order Dates | LOV text field | Enter or select a date range within which the order was created. |
| PO Number | Text field | Enter a PO number by which to search. |
| Search | Button | Executes the search against the customer's pending orders. |
| Close | Button | Closes the form and returns user to the Quote Lines tab. |
| Clear | Button | Clears all of the fields in the form. |
| Results | Section | Area of the form that displays the results of the search. |

Table B-18 Service Reference Form Components

| Component | Type | Description |
|---------------------|---------------|---|
| Order Number | Column Header | Displays the order number for the serviceable product. |
| Order Line | Column Header | Displays the order line for the serviceable product. |
| Product | Column Header | Displays the serviceable product number. |
| Description | Column Header | Displays the serviceable product description. |
| UOM | Column Header | Displays the UOM for the serviceable product. |
| Quantity | Column Header | Displays the quantity for the serviceable product. |
| Order Date | Column Header | Displays the order date for the serviceable product. |
| System Name | Column Header | Displays the system name for the serviceable product. |
| Apply | Button | If this form was invoked via the Reference button in the Quote Lines tab, Service view form, it applies the changes to the quote and returns user to the original form. |
| Find Service For... | Button | If this form was invoked via the Add Service to Previous Purchase action in the Quote Header tab, it closes the form, passes the serviceable product information to the Service Item form, and goes to the Service Item form. |

See Also:

- [Section 26.4, "Adding a Service to the Quote"](#)

B.19 Approvals Form

Use this form by selecting the Approvals action from the Actions menu to view approval details, and initiate or cancel the approval process.

The following table describes the components on the Approvals form.

Table B-19 Approvals Form Components

| Component | Type | Description |
|----------------------|-----------------|--|
| Customer Type | Read-only field | Displays customer type. |
| Customer | Read-only field | Displays customer name. |
| Account | Read-only field | Displays customer account number. |
| Contact | Read-only field | Displays customer contact name. |
| Quote Number | Read-only field | Displays current quote number and version. |
| Quote Name | Read-only field | Displays current quote name. |
| Currency | Read-only field | Displays currency for quote. |
| Approval History | Section | Displays approval history information. |
| Requester | Read-only field | Displays name of person who initiated process. |
| Result | Hyperlink | Links to results of approval process. |
| Quote Version | Read-only field | Displays quote version associated with approval process. |
| Start Date | Read-only field | Displays start date of approval process. |
| End Date | Read-only field | Displays end date of approval process. If process not complete, this field is blank. |
| Approval Process | Section | Displays information about the approval process. |
| Approvers | Tab | Displays information about approvers. |
| Name | Read-only field | Displays approver name. |
| Response | Read-only field | Displays approver response. |
| Rules | Tab | Displays information about approval rules. |
| Rule Description | Read-only field | Displays rule description. |
| Approval | Read-only field | Displays rule approval level. |
| Comments | Tab | Displays selected approvers comments. |
| Notification History | Tab | Displays notification history. |
| Sequence | Read-only field | Displays sequence of notifications. |
| Name | Read-only field | Displays name of notified approver. |

Table B–19 Approvals Form Components

| Component | Type | Description |
|---------------------------|-----------------|--|
| Activity | Read-only field | Displays notification reason. |
| Date Sent | Read-only field | Displays date notification sent. |
| Response Date | Read-only field | Displays response date. |
| Due Date | Read-only field | Displays the approval due date. |
| Status | Read-only field | Displays the approval status. |
| Result | Read-only field | Displays the result. |
| Requestor Comments | Read-only field | Displays requester comments. |
| Initiate Approval Process | Button | Initiates the approval process and takes you to the next approval form. Disabled if quote is in Approval Pending status, user does not have Update access, quote is not in the highest version, quote is in Order Submitted status, and quote is submitted for batch processing. |
| Cancel Approval Process | Button | Cancels the approval process. Disabled if quote is not in Approval Pending status, user does not have Update access, quote is not in the highest version, quote is submitted for batch processing. |

See Also:

- [Section 28.1, "Overview of Approvals"](#)
- [Section 28.2, "Initiating an Approval"](#)
- [Section 28.3, "Viewing Approval Details"](#)

B.20 Initiate Approval Form

Use this form to initiate the approval process. This form is accessible via the Approvals form.

The following table describes the components on the Initiate Approval form.

Table B–20 Initiate Approval Form Components

| Component | Type | Description |
|--|-----------------------------|--|
| Customer Type | Read-only field | Displays customer type. |
| Customer | Read-only field | Displays customer name. |
| Account | Read-only field | Displays customer account number. |
| Contact | Read-only field | Displays customer contact name. |
| Quote Number | Read-only field | Displays current quote number and version. |
| Quote Name | Read-only field | Displays current quote name. |
| Currency | Read-only field | Displays currency for quote. |
| Approval Process | Section | Displays information about the approval process. |
| Approvers | Tab | Displays information about approvers. |
| Name | Read-only field | Displays approver name. |
| Rules | Tab | Displays information about approval rules. |
| Rule Description | Read-only field | Displays the rule description. |
| Approval | Read-only field | Displays the rule approval level. |
| Requester Comments | Text field | Enter comments. |
| Approver List | Section | Displays approver list information. |
| A non standard contract is required for this quote | Checkbox | Requests contract creation after the quote is approved. |
| Obtain approval from the entire list of approvers | Radio button | Requires approval from all approvers. |
| Obtain approval from the list of approvers starting with | Radio button/Drop-down menu | Allows you to indicate which approver should start the approval process. Select from list of approvers. You can only use this option if ASO: Allow Skip Approvers is set to Yes at the appropriate level. |

Table B–20 *Initiate Approval Form Components*

| Component | Type | Description |
|---------------------|--------|--|
| Submit for Approval | Button | Submits the quote for approval. |
| Approve Quote | Button | Allows sales rep to approve the quote. |
| Cancel | Button | Cancels the process and closes the form. |

See Also:

- [Section 28.1, "Overview of Approvals"](#)
- [Section 28.2, "Initiating an Approval"](#)
- [Section 28.3, "Viewing Approval Details"](#)

B.21 Sales Credits Form

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

The following tables describe the components on the header level Sales Credits form.

Table B–21 *Header Sales Credits Form Components*

| Component | Type | Description |
|--------------|-----------------|--|
| Quote Name | Read-only field | Displays the quote name. |
| Quote Number | Read-only field | Displays the number of the current quote. |
| Version | Read-only field | Displays the quote version. |
| Customer | Read-only field | Displays the quote-to customer on the current quote. |
| Account | Read-only field | Displays the quote-to account for the current quote. |
| Contact | Read-only field | Displays the quote-to contact on the current quote. |
| Quote Status | Read-only field | Displays the quote status. |
| Sales Credit | Section | Section where details about sales credits are entered. |

Table B–21 Header Sales Credits Form Components

| Component | Type | Description |
|-------------------|-----------------|--|
| Salesperson | LOV text field | <p>Defaults sales credits to the primary salesperson in the quote header. The default is 100% revenue sales credit of the default credit type associated with the primary salesperson.</p> <p>If the primary salesperson and/or primary sales group change, the change should be reflected in the default sales credit as well. If they change after the header sales credits are applied, the change will not be reflected in the header sales credit form.</p> <p>Select a salesperson to whom you wish to allocate a sales credit. The LOV displays only salespeople who are set up as valid salesreps.</p> |
| Sales Group | LOV text field | <p>Defaults from the primary sales group in the quote header.</p> <p>Select the sales group for the corresponding salesperson.</p> |
| Credit Type | LOV text field | <p>Select the type of sales credit to allocate. A sales credit can either be Quota Sales Credit or Non-Quota Sales Credit. A quota sales credit is based on invoice lines and is applied against a salesperson's quota. A non-quota sales credit is not associated with invoice lines and is not usually applied to a sales representative's quota.</p> <p>Set up in Order Management.</p> |
| Revenue | Read-only field | Indicates if the credit is revenue or non-revenue. |
| Percent | LOV text field | Select the percentage of the sales credit. |
| Revenue Total | Read-only field | If the type is Quota Sales Credit , this field must be blank or add up to 100%. |
| Non-Revenue Total | Read-only field | If the type is Non-Quota Sales Credit , this field can contain any amount. |
| Remove | Button | Removes selected sales credit. |
| Apply | Button | Select to apply the sales credits to the quote. |
| Cancel | Button | Cancels any changes and returns user to the main Oracle Quoting form. |

The following tables describe the components on the line level Sales Credits form.

Table B–22 Line Sales Credit Form Components

| Component | Type | Description |
|------------------|-----------------|--|
| Line | Read-only field | Displays the line number the sales credit will be applied to. |
| Product | Read-only field | Displays the name and number of the product the sales credit will be applied to. |
| Description | Read-only field | Displays the name of the product the sales credit will be applied to. |
| Currency | Read-only field | Displays the currency used for the price of the product the sales credit will be applied to. |
| UOM | Read-only field | Displays the unit of measure of the product the sales credit will be applied to. |
| Quantity | Read-only field | Displays the quantity of the product the sales credit will be applied to. |
| List Price | Read-only field | Displays the list price of the product the sales credit will be applied to. |
| Selling Price | Read-only field | Displays the selling price of the product the sales credit will be applied to. |
| Salesperson | LOV text field | Select a salesperson you want to allocate a sales credit to. The LOV displays only salespeople who are set up as valid salesreps. If no sales credits are selected for line products, Oracle Quoting will use the header level sales credits. |
| Sales Group | LOV text field | Select a sales group for the corresponding salesperson. |
| Credit Type | LOV text field | Select the type of sales credit to allocate. A sales credit can either be Quota Sales Credit or Non-Quota Sales Credit . A quota sales credit is based on invoice lines and is applied against a salesperson's quota. A non-quota sales credit is not associated with invoice lines and is not usually applied to a sales representative's quota. Set up in Order Management. |
| Revenue | Read-only field | Indicates if the credit is revenue or non-revenue. |
| Percent | Text field | Select the percentage of the sales credit. |
| Revenue Total | Read-only field | If the type is Quota Sales Credit , this field must be blank or add up to 100%. |

Table B–22 Line Sales Credit Form Components

| Component | Type | Description |
|-------------------|-----------------|---|
| Non-Revenue Total | Read-only field | If the type is Non-Quota Sales Credit , this field can contain any amount. |
| Remove | Button | Removes selected sales credit. |
| Apply | Button | Applies the sales credit(s) and returns to the Oracle Quoting form. |
| Cancel | Button | Cancels any changes and returns user to the Oracle Quoting form. |

See Also:

- [Section 26.10, "Allocating Sales Credit"](#)

B.22 Available to Promise (ATP) Form

Use the Available to Promise (ATP) form to check product availability dates by choosing the Check Availability action from the Actions menu.

The following table describes the components on the Available to Promise (ATP) form.

Table B–23 Available to Promise (ATP) Form Components

| Component | Type | Description |
|----------------|-----------------|---|
| Item | Read-only field | Displays the part number for the product currently selected in the Quote Lines tab. |
| Description | Read-only field | Displays a description of the product currently selected in the Quote Lines tab. |
| UOM | Read-only field | Displays the UOM for the product currently selected in the Quote Lines tab. |
| Quantity | Read-only field | Displays the quantity of the product requested by the customer. |
| Request Date | Read-only field | Displays the date the product was requested. |
| Available | Read-only field | Displays the quantity available. |
| Available Date | Read-only field | Displays the date the entire desired quantity will be available. |

Table B–23 Available to Promise (ATP) Form Components

| Component | Type | Description |
|------------------|-----------------|--|
| Warehouse | Read-only field | Displays the warehouse against which the ATP check is performed. |
| Onhand | Read-only field | Displays the quantity available on hand. |
| Save Warehouse | Checkbox | Select to save the warehouse for use in future availability checks. If a warehouse is already saved for the line, by default the box is selected. Deselecting this box will remove the saved warehouse. |
| Item ATP Message | Read-only field | Displays the message generated from Inventory. |
| OK | Button | Closes the ATP window and return to the Oracle Quoting form. |

See Also:

- [Section 26.9, "Checking Product Availability"](#)

B.23 Contract Detail Information Form

Use the Contract Detail Information form to view contract detail information or request contract creation by choosing the Contract action from the Actions menu.

The following table describes the components on the Contract Detail Information form.

Table B–24 Contract Detail Information Form Components

| Component | Type | Description |
|-------------------|-----------------|--|
| Contract Template | LOV text field | Select a contract template. Defaults to the contract designated in OKC: Contract Template for Standard Terms and Conditions . |
| Number | Read-only field | Displays the contract number. |
| Modifier | Read-only field | Displays the modifier for the contract. |
| Version | Read-only field | Displays the contract version. |

Table B–24 Contract Detail Information Form Components

| Component | Type | Description |
|---|--------------|---|
| Use default terms and conditions defined in contract template | Radio button | Select to use default terms and conditions. |
| Request contract creation if you need to negotiate terms and conditions | Radio button | Select to request contract creation. |
| Comments | Text field | Enter comments about the contract. Read-only unless contract creation is requested. |
| Review Terms | Button | Accesses terms and conditions for the selected template. |
| Cancel | Button | Cancels any changes. |
| OK | Button | Begins contract creation processes. If Request contract creation if you need to negotiate terms and conditions button is selected, this button is disabled if a non-standard contract is not attached to the quote, user does not have Update access, quote is not in the highest version, quote is in Order Submitted status, and quote is submitted |

See Also:

- [Section 30.2, "Creating a Quote with Non Default Terms and Conditions"](#)

B.24 Contract Detail Form

Use the Contract Detail form to view additional details about the contract for the quote. This form is accessible by selecting **Request contract creation if you need to negotiate terms and conditions** on the Contract Details Information form.

The following table describes the components on the Contract Detail form.

Table B–25 Contract Detail Form Components

| Component | Type | Description |
|---------------------|-----------------|---|
| Contract Template | Read-only field | Displays the contract template name. Defaults to the contract designated in OKC: Contract Template for Standard Terms and Conditions . |
| Number | Read-only field | Displays the contract number. |
| Modifier | Read-only field | Displays the modifier for the contract. |
| Version | Read-only field | Displays the contract version. |
| Contract Number | Read-only field | Displays the assigned contract number. |
| Modifier | Read-only field | Displays the modifier for the contract. |
| Status | Read-only field | Displays the status of the contract approval. |
| Short description | Read-only field | Displays a brief description of the quote the contract originated from. |
| Approval Date | Read-only field | Displays the contract approval date. |
| Signature Date | Read-only field | Displays the contract signature date. |
| Termination Date | Read-only field | Displays the contract termination date. This value comes from Oracle Sales Contracts. |
| Start Date | Read-only field | Displays the start date of the contract. |
| End Date | Read-only field | Displays the end date of the contract. |
| Description | Read-only field | Displays the description of the non-standard terms of the contract. |
| Review Terms | Button | Accesses terms and conditions for the selected template. |
| Cancel | Button | Cancels any changes. |
| Contract Assistance | Button | Requests further contract assistance. |
| Cancel Approval | Button | Cancels the approval process. Disabled if quote is not in Approval Pending status, user does not have Update access, quote is in Order Submitted status, quote is submitted for batch processing. |

See Also:

- [Section 30.2, "Creating a Quote with Non Default Terms and Conditions"](#)

B.25 Contract Terms & Conditions Form

Use this form to view the terms and conditions of the contract for the quote. This form is accessible via the Review Terms Button on the Contract Detail Information form.

The following table describes the components of the Contract Terms & Conditions form.

Table B–26 Contract Terms & Conditions Form Components

| Component | Type | Description |
|-------------------|-----------------|--|
| Contract Template | Read-only field | Defaults to the contract designated in OKC: Contract Template for Standard Terms and Conditions . |
| Contract Number | Read-only field | Displays the contract number. |
| Done | Button | Returns user to the previous screen. |

See Also:

- [Section 30.3, "Viewing a Quote's Terms and Conditions"](#)

B.26 Copy Quote Form

Use this Actions menu option to copy quote information into either a new or revised quote.

The following table describes the components on the Copy Quote form.

Table B–27 Copy Quote Form Components

| Component | Type | Description |
|--------------|--------------|---|
| Copy From | Section | Select the information you want to copy. |
| Quote Header | Radio button | Copies the quote header information into a new or revised quote (includes all Ship To, Bill To, and payment information). |
| Lines | Checkbox | Copies the quote lines. |
| Notes | Checkbox | Copies all notes associated with your quote into a new or revised quote. |

Table B-27 Copy Quote Form Components

| Component | Type | Description |
|-----------------------|----------------------------|---|
| Attachments | Checkbox | Copies all attachments associated with your quote into a new or revised quote. |
| All Quote Information | Radio button | Copies all header, address and payment information as well as product details, notes, and attachments into a revised or a new quote. |
| Copy To | Section | Displays where quote information is copied to. |
| New Quote | Radio button | Copies the selected information into a new quote. |
| New Quote Number | Read-only field/Text field | Disabled unless the profile option ASO: Auto Numbering is set to No and the user selects Copy to > New Quote . You must enter a quote number for the new quote. |
| Version | Radio button | Copies the selected information into a new version of the existing quote. |
| Apply | Button | Applies changes and returns user to the main Oracle Quoting form, where new or revised quote is displayed. |
| Cancel | Button | Cancels changes and returns user to the main Oracle Quoting form. |

See Also:

- [Section 20.2, "Creating a Quote"](#)
- [Section 27.2, "Copying a Quote"](#)

B.27 Price Adjustment Form

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

The following table describes the components on the header level Price Adjustment form.

Table B-28 Price Adjustment Form - Header Level Components

| Component | Type | Description |
|--------------------|---------------------------------------|---|
| Quote Name | Read-only field | Displays the name of the current quote. |
| Quote Number | Read-only field | Displays the quote number for the current quote. |
| Version | Read-only field | Displays the version of the quote. |
| Customer | Read-only field | Displays the Quote To customer designated for the current quote. |
| Account | Read-only field | Displays the Quote To account for the customer designated on the current quote. |
| Contact | Read-only field | Displays the Quote To contact for the customer designated for the current quote. |
| Quote Status | Read-only field | Displays the quote status for the current quote. |
| Currency | Read-only field | Displays the designated currency for the current quote. |
| Header Adjustments | Section | Displays adjustment information that applies to the entire quote. |
| Modifier Name | Read-only field pr LOV text field. | Displays name of modifier. If ASO: Discounting Privilege is set to Partial or Full , users can apply non-automatic price adjustments. Therefore, the modifier can also be an LOV text field. |
| Level | Read-only field | Displays the level at which the adjustment is applied. Since you are in the Header Price Adjustments form, this field always displays the value order. |
| Modifier Type | Read-only field | Displays the modifier type of the price adjustment. This value is defaulted in from Oracle Pricing. Oracle Quoting supports the following modifier types: Discounts , Surcharges , and Price Breaks . |
| Application Method | Read-only field | Displays the application method for the price adjustment. The value can be either % or AMT . For example, if the application method is % and the value is 10, there is a 10% discount applied to the order. If the application method is AMT and the value is 10, there is a \$10 discount applied to the order. |

Table B–28 Price Adjustment Form - Header Level Components

| Component | Type | Description |
|----------------------|-------------------------------|---|
| Value | Read-only field or Text field | Displays the adjustment amount or percent. If the profile option ASO: Discounting Privilege is set to Full and the Override flag is selected for the adjustment in Oracle Pricing, the value can be overridden in this field. |
| Adjusted Amount | Read-only field | Displays the adjusted amount for the quote. For example, if you apply a discount to the quote, this field displays the amount subtracted from the quote total. If you apply a discount, the adjusted amount field displays a negative value. |
| Automatic | Read-only checkbox | Indicates whether the price adjustment is automatically applied or not. If the box is checked, adjustments apply whenever the adjustment criteria is met. If the box is not checked, this is a promotion applied manually via the Promotions form or a non-automatic adjustment. You can manually apply adjustments in this page if ASO: Discounting Privilege is set to Full or Partial . This flag is set depending on whether the adjustment is Automatic or Ask for in the Oracle Pricing engine. |
| Remove | Checkbox | Check this box to remove a non-automatic discount. Read-only if the discount is automatic. |
| Reason Code | Column header | Displays reason code. Mandatory if the user changes the Value field and the Override flag is enabled. |
| Reason Text | Column header | Displays text description of reason. |
| Modifier Description | Read-only field | Displays the description of the modifier. The description is defined in Oracle Pricing. |
| Apply | Button | Applies the pricing adjustment to the quote and returns user to the Oracle Quoting form. |
| Reset | Button | Resets the price adjustments to their original values. |
| Cancel | Button | Returns user to the Oracle Quoting form. |

The following table describes the components on the line level Price Adjustment form.

Table B-29 Price Adjustments Form - Line Level Components

| Component | Type | Description |
|--------------------|-----------------|---|
| Line | Read-only field | Displays the line number of the line currently selected in the Quote Lines tab. |
| Product | Read-only field | Displays the part number and description of the product currently selected in the Quote Lines tab. |
| UOM | Read-only field | Displays the UOM for the product currently selected in the Quote Lines tab. |
| Unit List Price | Read-only field | Displays the unit list price of the product currently selected in the Quote Lines tab. |
| Total List Price | Read-only field | Displays the total list price for the product based on the quantity selected in the Quote Lines tab. |
| Quantity | Read-only field | Displays the quantity of the product currently selected in the Quote Lines tab. |
| Unit Adjustment | Read-only field | Displays the adjustment per unit. |
| Total Adjustment | Read-only field | Displays the total adjustment for the product based on the quantity. |
| Currency | Read-only field | Displays the default currency for the product currently selected in the Quote Lines tab. |
| Unit Selling Price | Read-only field | Displays the selling price per unit of the product currently selected in the Quote Lines tab. |
| Total Price | Read-only field | Displays the total price of the product after adjustment. |
| Line Adjustments | Section | Displays the line adjustment information. |
| Modifier Name | Column heading | Displays name of modifier. If ASO: Discounting Privilege is set to Partial or Full, users can apply non-automatic price adjustments. Therefore, the modifier can also be an LOV text field. |
| Level | Read-only field | Displays line and order level adjustments. |
| Modifier Type | Column heading | Displays the modifier type of the price adjustment. This value is defaulted in from Oracle Pricing. Oracle Quoting supports the following modifier types: Discounts, Surcharges, Freight/Special Charges, and Price Breaks. |

Table B-29 Price Adjustments Form - Line Level Components

| Component | Type | Description |
|----------------------|-------------------------------|---|
| Application Method | Read-only field | Displays the application method for the price adjustment. The value can be either % or AMT . For example, if the application method is % and the value is 10, there is a 10% discount applied to the product or order. If the application method is AMT and the value is 10, there is a \$10 discount applied to the product or order. |
| Value | Read-only field or Text field | Displays the adjustment amount or percent. Updateable if: <ul style="list-style-type: none"> ■ Override Allowed flag is enabled for the price break adjustment. ■ ASO: Discounting Privilege is set to Full ■ User has update access ■ Highest version of quote is displayed ■ The quote is not in a read-only status |
| Adjusted Amount | Read-only field | Displays the adjusted amount for the product. For example, if you apply a discount to the product, this field displays the amount subtracted from the unit list price. If you apply a discount, the Adjusted Amount field displays a negative value. |
| Automatic | Read-only checkbox | Indicates whether the price adjustment is automatically applied or not. If the box is checked, adjustments apply whenever the adjustment criteria is met. If the box is not checked, this is a promotion applied manually via the Promotions form. Set in Oracle Pricing. |
| Remove | Checkbox | Select this box to remove a non-automatic discount. Read-only if the discount is automatic. |
| Reason Code | Column header | Displays reason code. Mandatory if the user changes the Value field and the Override flag is enabled. |
| Reason Text | Column header | Displays text description of reason. |
| Modifier Description | Read-only field | Displays the description of the modifier. The description is defined in Oracle Pricing. |
| Apply | Button | Applies the pricing adjustment to the quote and returns user to the Oracle Quoting form. |

Table B-29 Price Adjustments Form - Line Level Components

| Component | Type | Description |
|--------------------|----------------------------|--|
| Details | Button | Accesses the Price Break modifier's details. Enabled only if the adjustment is a price break. |
| Reset | Button | Resets the price adjustments to their original values. |
| Cancel | Button | Returns user to the Oracle Quoting form. |
| Line Adjustments | Section | Displays Price Break details. This section is displayed if the adjustment is a price break and the Details button is selected. |
| Modifier Name | Read-only field | Displays the modifier name. |
| Application Method | Read-only field | Displays the application method. |
| Value | Read-only field/Text field | The value can be either % or AMT . Updateable if: <ul style="list-style-type: none"> ▪ Override Allowed flag is enabled for the price break adjustment. ▪ ASO: Discounting Privilege is set to Full ▪ User has update access ▪ Highest version of quote is displayed ▪ The quote is not in a read-only status |
| Adjusted Amount | Read-only field | Displays the adjusted amount. |
| Break Qty | Read-only field | Displays the price break quantity. |
| Break Type | Read-only field | Displays the price break type. Possible values are POINT and RANGE . |

Table B-29 Price Adjustments Form - Line Level Components

| Component | Type | Description |
|-------------|--------------------------------|---|
| Reason Code | Read-only field/LOV Text field | <p>Select a reason code for changing the Value field for the price break adjustment. The LOV shows reason codes set up in Oracle Order Management.</p> <p>Mandatory if the Overrideable flag for the price break adjustment is enabled and the user changes the Value field.</p> <p>Updateable if:</p> <ul style="list-style-type: none"> ■ Override Allowed flag is enabled for the price break adjustment. ■ ASO: Discounting Privilege is set to Full ■ User has update access ■ Highest version of quote is displayed ■ The quote is not in a read-only status |
| Reason Text | Read-only field/Text field | <p>Enter a reason for changing the Value field for a price break adjustment.</p> <p>Updateable if:</p> <ul style="list-style-type: none"> ■ Override Allowed flag is enabled for the price break adjustment. ■ ASO: Discounting Privilege is set to Full ■ User has update access ■ Highest version of quote is displayed ■ The quote is not in a read-only status |
| OK | Button | Applies changes and returns to the default view of the Line level Price Adjustments form. |
| Cancel | Button | Discards changes and returns to the default view of the Line level Price Adjustments form. |

See Also:

- [Section 23.1.4, "Pricing Adjustments"](#)
- [Section 23.10, "Manually Adjusting Prices in the Price Adjustments Form"](#)
- [Section 23.9, "Applying a Non-Automatic Discount to a Product or the Entire Quote"](#)

B.28 Pricing Request Details Form

Select the Pricing Request Details action from the Actions menu to view the Pricing Request Details form. This form shows details of the latest pricing request.

The following table describes the components on the Pricing Request Details form.

Table B–30 Pricing Request Details Form Components

| Component | Type | Description |
|----------------|-----------------|--|
| Quote Name | Read-only field | Displays the quote name. |
| Customer | Read-only field | Displays the Quote To customer. |
| Contact | Read-only field | Displays the Quote To contact. |
| Quote Number | Read-only field | Displays the quote number. |
| Version | Read-only field | Displays the quote version. |
| (Version) Of | Read-only field | Displays the maximum quote version. |
| Account | Read-only field | Displays the Quote To account. |
| Quote Status | Read-only field | Displays the quote status. |
| Request ID | Read-only field | Displays the request identifier for the concurrent program used for the pricing request. Use this ID to query the concurrent request and monitor progress. |
| Request Name | Read-only field | Displays the concurrent program name for the batch request, which is Pricing Request . |
| Phase | Read-only field | Displays the request phase. |
| Status | Read-only field | Displays the request status. |
| Date Submitted | Read-only field | Displays the date and time when the batch request started. Blank if request has not started. |
| Requestor | Read-only field | Displays the username of the person submitting the request. |
| Date Started | Read-only field | Displays the date and time when the batch request started. Blank if the request has not started. |
| Done | Button | Closes the form and returns user to the Oracle Quoting form. |

Table B–30 Pricing Request Details Form Components

| Component | Type | Description |
|------------------------|--------|---|
| Cancel Pricing Request | Button | <p>Cancels the submitted request, displays an informational message containing the request id or displays error messages for errors, and then closes the form after the user acknowledges the message.</p> <p>Is not visible if the quote is not in the highest version, user does not have Update access, quote is in a read-only status, and the last submitted pricing request is not in Pending, Inactive or Running phase.</p> |

See Also:

- [Section 23.2, "Executing Manual Pricing and Tax Requests for a Quote"](#)
- [Section 23.2.1, "Viewing Details of the Pricing Request"](#)
- [Section 23.2.2, "Canceling a Pricing Request"](#)

B.29 Printing Page

Select the Print Quote action from the Action menu to print a quote.

The following table describes the components on the Printing page.

Table B–31 Printing Page Components

| Component | Type | Description |
|-----------------------------------|----------------|--|
| Output Format | Drop-down menu | Select the output format for the printed quote. |
| Template | Drop-down menu | Select the template for the printed quote. |
| Show subtotal by product category | Checkbox | Determines if printed quote displays subtotal by product category. |
| Show price adjustments | Checkbox | Determines if printed quote shows price adjustments. |
| Show Header Attachments | Checkbox | <p>Determines if printed quote shows header attachments.</p> <p>Appears only if ASO: Print Quote Show Attachments is set to Yes.</p> |

Table B–31 Printing Page Components

| Component | Type | Description |
|--------------------------|----------|---|
| Show Line Attachments | Checkbox | Determines if printed quote shows line attachments. Appears only if ASO: Print Quote Show Attachments is set to Yes . |
| Show Charges | Checkbox | If checked, charges details appear on the quote printout. If unchecked, charges details are not printed but, total charges are displayed in the subtotal section of the printout. |
| Print in executable mode | Checkbox | If contracts integration is enabled, determines if printed quote includes terms and conditions, and signature block. If contracts integration is not enabled, determines if the printed quote shows the signature block. Appears only if the quote is executable. |
| Done | Button | Closes the form and returns user to the original form. |
| Submit | Button | Executes the selections made by the user. |

See Also:

- [Section 31.2, "Printing a Quote"](#)

B.30 Promotions/Pricing Attributes Form

Use the Promotions/Pricing Attributes action from the Actions menu to select a promotion to apply to a product or quote. Promotions are defined in Oracle Pricing.

The following table describes the components on the Promotions tab.

Table B–32 Promotions/Pricing Attributes Form - Promotions Components

| Component | Type | Description |
|------------|-----------------|---|
| Promotions | Tab | Displays fields related to promotions. |
| Level | Read-only field | Displays the level at which the promotion is applied. The values, which are designated in Oracle Pricing, are Order or Line . If the level of the promotion is Order , the promotion applies to all lines in the quote. If the level is Line , the promotion applies to the line selected in the Quote Lines tab. |

Table B-32 Promotions/Pricing Attributes Form - Promotions Components

| Component | Type | Description |
|------------------|------------------------|---|
| Promotion No | LOV text field | Displays the modifier number for the promotion. This value is defined in Oracle Pricing. |
| Promotion Name | Read-only field | Displays the promotion name associated with the promotion number. A value is defaulted into this field when the promotion number is entered. This value is defined in Oracle Pricing. |
| List Line | LOV text field | Displays the individual list line number of the specific promotion. This value is defined in Oracle Pricing. |
| Date From | Read-only field | Displays the starting date of the promotion, if one exists. This field is only populated when there is a finite period of time that the promotion is valid. This value is defined in Oracle Pricing. |
| Date To | Read-only field | Displays the ending date for a promotion. This field is only populated when there is a finite period of time that the promotion is valid. This value is defined in Oracle Pricing. |
| Override Flag | Read-only Check box | If this box is checked, the amount of the promotion can be overridden. If it is not checked, the amount cannot be overridden. Overrides are not supported on an individual promotion level. They are only supported through manual overrides. This flag is set in Oracle Pricing. |
| Cancel | Button | Cancels the promotion selection in progress and returns user to the Oracle Quoting form. |
| Apply | Button | Applies the selected promotion to the quote. |

The following table describes the components on the Pricing Attributes tab.

Table B-33 Pricing/Promotions Attributes Form - Pricing Components

| Component | Type | Description |
|--------------------|-----------------|---|
| Pricing Attributes | Tab | Displays fields related to pricing attributes. |
| Level | Read-only field | Displays level at which the pricing attribute is applied. |
| Pricing Context | LOV text field | Select the pricing attribute context to apply to the quote. |

Table B–33 Pricing/Promotions Attributes Form - Pricing Components

| Component | Type | Description |
|-----------|-----------|---|
| Flexfield | Flexfield | Launches flexfield window if flexfields exist for the selected context. |
| Cancel | Button | Cancels unapplied changes and returns user to the Oracle Quoting form. |
| Apply | Button | Applies pricing attribute changes. |

See Also:

- [Section 23.4, "Applying Custom Pricing Attributes"](#)
- [Section 23.7, "Applying Promotion Codes"](#)

B.31 Sales Team Form

Select the Sales Team action from the Actions menu to designate the sales person information for an order.

The following table describes the components on the Sales Team form.

Table B–34 Sales Team Form Components

| Component | Type | Description |
|--------------|-----------------|--|
| Quote Name | Read-only field | Displays the name of the current quote. |
| Quote Number | Read-only field | Displays the number of the current quote. |
| Version | Read-only field | Displays the version of the current quote. |
| Customer | Read-only field | Displays the customer on the current quote. |
| Account | Read-only field | Displays the account for the current quote. |
| Contact | Read-only field | Displays the contract for the current quote. |
| Quote Status | Read-only field | Displays the quote status of the current quote. |
| Folder Icon | Button | Accesses private and public folders created by user. |
| Full Access | Checkbox | Determines if sales team member has update or view-only access to the quote. |
| Name | LOV text field | Enter the name of the resource to add to the quote sales team. |
| Job Title | Read-only field | Displays sales team member's job title. |

Table B–34 Sales Team Form Components

| Component | Type | Description |
|------------------|-----------------|--|
| Group | Text field | Displays the sales team member's group, as defined in Resource Manager. |
| Phone | Read-only field | Displays the phone number. |
| Email | Read-only field | Displays the email address. |
| Keep | Checkbox | Determines if sales team member can be replaced by automatic territory manager reassignment. |
| Primary | Checkbox | Determines if the sales team member is the primary sales agent for the quote. Can only be assigned to one sales team member. |
| Apply | Button | Applies the changes and returns user to the Oracle Quoting form. |
| Cancel | Button | Cancels unapplied changes and returns user to the Oracle Quoting form. |

See Also:

- [Section 32.2, "Adding a Resource to the Quote Sales Team"](#)

B.32 Service Items Form

Select the Service Items action from the Actions menu to view information on included services and extended services.

The following table describes the components on the Service Items form.

Table B–35 Service Items Form Components

| Component | Type | Description |
|------------------|-----------------|---|
| Service For | Section | Displays information about the selected product. |
| Source | Read-only field | Displays the reference source: Current Quote , Pending Order or Installed Base . |
| Product | Read-only field | Displays the product that services are associated to. |
| Description | Read-only field | Displays a short description for the serviceable product. |
| UOM | Read-only field | Displays the unit of measure for the serviceable product. |

Table B-35 Service Items Form Components

| Component | Type | Description |
|----------------------|---------------------|---|
| Quantity | Read-only field | Displays the serviceable product quantity. |
| Order Date | Read-only field | Displays the order date for the serviceable product. Appears if reference source is Installed Base or Pending Order . |
| Order Number | Read-only field | Displays the order number for the serviceable product. Appears if reference source is Installed Base or Pending Order . |
| Order Line Number | Read-only field | Displays the order line number for the serviceable product. Appears if reference source is Installed Base or Pending Order . |
| System | Read-only field | Displays the system name for the serviceable product. Appears if reference source is Installed Base or Pending Order . |
| Serial Number | Read-only field | Displays the system name for the serviceable product. Appears if reference source is Installed Base . |
| Installed At Address | Read-only field | Displays the installed at address for the serviceable product. Appears if reference source is Installed Base . |
| Selected Services | Section | Displays information on the service included with the serviceable product. |
| Product | Read-only field | Displays the number of the included service. |
| Description | Read-only field | Displays the description of the included service. |
| Start Date | Read-only field | Displays the start date of the included service. |
| Duration | Read-only field | Displays the duration of the included service. |
| Period | Read-only field | Displays the period of the included service. |
| Included | Read-only check box | Checked if the service product is an included warranty. |
| Available Services | Section | Displays information about additional services you can purchase. |

Table B–35 Service Items Form Components

| Component | Type | Description |
|--------------|------------------|--|
| Product | Read only column | Displays the product number of the extended service. |
| Description | Read only column | Displays a description for the extended service. |
| Add to Quote | Button | Adds the selected extended service to the quote, closes the form and returns user to the Oracle Quoting form. Disabled if there are no applicable services. |
| Cancel | Button | Closes the form and returns user to the Oracle Quoting form. |

See Also:

- [Section 26.4, "Adding a Service to the Quote"](#)

B.33 Split Lines Form

Use the Split Lines action from the Actions menu to split a line.

The following table describes the components on the Split Lines form.

Table B–36 Split Lines Form Components

| Component | Type | Description |
|----------------|-----------------|--|
| Line | Read-only field | Displays the line number of the product to be split. |
| Product | Read-only field | Displays the number and name of the product for which you want to split the line. |
| Description | Read-only field | Displays the name of the product. |
| UOM | Read-only field | Displays the UOM of the product for which you want to split the line. |
| Quantity | Read-only field | Displays the total quantity of the line. |
| Split Quantity | Text field | Enter the quantity that you want to split to a new line. |
| Total | Read-only field | Displays the total quantity of the split lines. |
| Apply | Button | Splits the original line into the designated quantity and returns user to the Quote Lines tab, where the split quantities show up as separate lines. |

Table B–36 Split Lines Form Components

| Component | Type | Description |
|-----------|--------|--|
| Cancel | Button | Cancels changes and returns user to the Quote Lines tab. |

See Also:

- [Section 26.12, "Splitting Lines"](#)

B.34 Tax Details Form

Select the Tax Details action from the Quote Lines tab's Actions menu to view tax details for lines in the quote.

The following table describes the components on the Tax Details form.

Table B–37 Tax Details Form Components

| Component | Type | Description |
|------------------|-----------------|---|
| Line | Read-only field | Displays the line number for which you are viewing tax details. |
| Product | Read-only field | Displays the product number. |
| Description | Read-only field | Displays the product name. |
| Currency | Read-only field | Displays the currency. |
| UOM | Read-only field | Displays the UOM. |
| Quantity | Read-only field | Displays the quantity. |
| List Price | Read-only field | Displays the list price. |
| Selling Price | Read-only field | Displays the selling price. |
| Line Tax Details | Section | Displays the tax details. |
| Tax Code | Read-only field | Displays the tax code(s) applied to the line. |
| Rate | Read-only field | Displays the rate for the corresponding tax code. |
| Amount | Read-only field | Displays the tax amount for the corresponding tax code. |
| Total | Read-only field | Displays the total tax amount for the line. |

Table B-37 Tax Details Form Components

| Component | Type | Description |
|-----------|--------|--|
| OK | Button | Closes this form, and returns user to the Oracle Quoting form. |

See Also:

- [Section 26.13, "Entering Tax Details"](#)

B.35 Publish Form

Select the Web Publish Quote action from the Actions menu to publish quotes to a web storefront.

The following table describes the components on the Publish form.

Table B-38 Publish Form Components

| Component | Type | Description |
|------------------|---------------------------------|--|
| Quote Name | Read-only field | Displays current quote name. |
| Quote Number | Read-only field | Displays current quote number and version. |
| Customer Name | Read-only field | Displays customer name. |
| Account Number | Read-only field | Displays customer account number. |
| Contact Number | Read-only field | Displays customer contact name. |
| Opportunity Name | Read-only field | Displays the opportunity name if the quote was created from an opportunity. |
| Username | Text field/Read-only field | If mandatory text field appears, the quote-to customer is not an FND_USER. Enter a username for the quote-to customer. Read-only when quote-to customer is an FND_USER. |
| Web Publish in | Drop-down menu | Select a specialty store where the quote will be published. Lists only stores where the quote version is eligible for publication. |
| Send Email To | Prompt | Prompt |
| Existing Address | Radio button and Drop-down menu | Select an existing address where publication notifications will be sent. |

Table B–38 Publish Form Components

| Component | Type | Description |
|-------------|-----------------------------|---|
| New Address | Radio button and Text field | Enter a new email address where publication notifications will be sent. |
| Comments | Text field | Optionally, enter comments about the web publishing. |
| Submit | Button | Submits the web publishing request. |

See Also:

- [Section 31.4, "Web Publishing a Quote"](#)

B.36 Customer History Form

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

The following table describes the components on the main Customer History form.

Table B–39 Customer History Form - Main Components

| Component | Type | Description |
|---------------|-----------------|--|
| Customer Type | Read-only field | Displays the customer type of the subject of the customer history. |
| Customer | Read-only field | Displays the name of the quote-to customer that is the subject of the customer history. |
| Account | LOV text field | Displays the quote-to account number associated with the customer that is the subject of the customer history. You can use the LOV to choose other accounts for the customer, if any exist. You can also select ALL , to see information for all accounts for the customer. If you choose another account, the screen refreshes with quote and order information for that account. |
| View Quote | Button | Displays the quote for the order that is highlighted in the Quote tab of the customer history form. Whether or not you can modify this quote depends on the quote status. |

Table B–39 Customer History Form - Main Components

| Component | Type | Description |
|------------------|-------------|---|
| View Order | Button | Displays the details of an order in the Order Management Sales form. Once the order is displayed in the Order Management form, you can modify it depending on the order status and the setting of the profile option ASO: OM Access . If ASO: OM Access is set to Full , you can modify the order in OM. If ASO: OM Access is set to Read-only , you cannot modify the order. |
| Cancel | Button | Closes the customer history window and returns user to the Oracle Quoting form. |

The following table describes the components on the Customer History form > Quotes tab.

Table B–40 Customer History Form - Quote Tab Components

| Component | Type | Description |
|-----------------------|----------------|--|
| Quote Name | Column heading | Displays the names of the quotes belonging to the customer displayed in the header of the Customer History form. |
| Quote Number | Column heading | Displays the quote number for the quote. |
| Account Number | Column heading | Displays the quote-to account number for the customer displayed in the header of the Customer History form. If the customer has more than one account, you can switch the account number in the header of the Customer History form, or select ALL to see the information for all of the customer's accounts. |
| Quote Status | Column heading | Displays the quote status. |
| Quote Total | Column heading | Displays the total amount of the quote. |
| Currency Code | Column heading | Displays the currency used on the quote. |
| Quote Expiration Date | Column heading | Displays the quote expiration date. |

Table B–40 Customer History Form - Quote Tab Components

| Component | Type | Description |
|------------------|--------------------|--|
| Contact Name | Column heading | Displays the name of the quote-to contact for the quote. Optional in the Oracle Quoting form, so this column may be blank. |
| Salesperson Name | Column Heading | Displays the name of the primary sales agent for the quote. |
| Object | Read-only text box | Displays the source or outcome of the quote. For example, a quote is created from an opportunity, or a quote is submitted and becomes an order. When you highlight a quote in the table above, these fields populate with the appropriate information. If a quote does not have any related objects that meet the search criteria, the field should remain blank. |
| Number | Read-only text box | Displays the object ID number. |
| Status | Read-only text box | Displays the status of the object in its respective application. |
| Relationship | Read-only text box | Displays the relationship of the object to the quote. For example, if the object is an opportunity, the relationship is Opportunity to Quote . If the object is an order, the relationship is Quote to Order . |

The following table describes the components on the Customer History form > Order tab.

Table B–41 Customer History Form - Order Tab Components

| Component | Type | Description |
|--------------|----------------|---|
| Order Number | Column heading | Displays the order number for an order in Order Management. If the order was created from a quote, the order number serves as a confirmation number in Oracle Quoting. |
| Order Status | Column heading | Displays the current status of the order in Order Management. There are two statuses in Oracle Quoting that you can apply to quotes that are converted to orders: Booked and Entered . Booked is the default value for the profile option ASO: Default Order State . |

Table B–41 Customer History Form - Order Tab Components

| Component | Type | Description |
|------------------|----------------|---|
| Creation Date | Column heading | Displays the date the order was placed. |
| Order Total | Column heading | Displays the total amount charged for the order. The order total includes adjustments and tax information. |
| Currency Code | Column heading | Displays the currency used for the order. |
| Account Number | Column heading | Displays the account number for the quote-to customer displayed in the Customer History form. If the customer has more than one account, you can choose one of their other accounts in the header Account field, or select ALL to view information for all of the customer's accounts. |
| Quote Number | Column heading | Displays the quote number concatenated with the version number, from which the order was created. This column should be blank if the order was not created from a quote. |
| Quote Name | Column heading | Displays the name of the quote from which the order was created. Should be blank if the order was not created from a quote. |
| Contact Name | Column heading | Displays the name of the quote-to contact for the order. This contact field is optional in the Oracle Quoting form and this column should therefore remain blank if a contact does not exist. |
| Salesperson Name | Column Heading | Displays the primary sales agent for the order. |

See Also:

- [Section 26.15, "Viewing the Quote Versions"](#)
- [Section 26.1, "Modifying a Customer Quote"](#)
- [Section 26.17, "Viewing the Order History for a Customer"](#)

B.37 Quote, Customer Search Form > Quote View

Use this form to search for quotes or customers.

The following table describes the components on the Quote, Customer Search Form > Quote view.

Table B-42 *Quote, Customer Search Form > Quote View Components*

| Component | Type | Description |
|----------------|----------------|---|
| Find | Drop-down menu | Select a search parameter. Possible values are: Quote, Organization, Person . Defaults to Quote unless invoked from the Quote To customer, Quote To account, or Quote To contact fields. In these cases, defaults to Organization . |
| Basic | Tab | Area where you conduct a basic search for the quote. |
| Folder Icon | Button | Accesses private and public folders created by user. |
| Customer Name | LOV text field | Enter or select the customer name on the quote you are searching for. The LOV will be sorted by customer name and account number and will show the following fields: customer name, account number, and customer type. ASO: View Customers Without Accounts must not be used to filter the LOV results. |
| Account Number | LOV text field | Enter or select the account number of the quote you are searching for. The LOV will be sorted by account number and will show the following fields: account number, account description, customer name, and customer type. |
| Contact Name | Text field | Enter the contact name on the quote you are searching for. |
| Quote Name | Text field | Enter the quote name of the quote you are searching for. |
| Quote Number | Text field | Enter the quote number of the quote you are searching for. |
| Quote Status | LOV text field | Enter or select the quote status of the quote you are searching for. |
| Product | LOV text field | Enter or select the product on the quote you are searching for. The LOV will show all active parts and will show the following fields: product and description. |

Table B-42 Quote, Customer Search Form > Quote View Components

| Component | Type | Description |
|------------------------|------------------|---|
| Expiration Date (From) | Date field | Enter the start date of the expiration date range of the quote you are searching for. |
| Expiration Date (To) | Date field | Enter the end date of the expiration date range of the quote you are searching for. |
| PO Number | Text field | Enter the PO number of the quote you are searching for. |
| Search | Button | Executes search. |
| Close | Button | Closes the Quote, Customer Search form. |
| Clear | Button | Clears the search criteria fields. |
| Results (Quote) | Section | Displays results of the Quote search. |
| Quote Name | Read-only column | Displays quote name. |
| Quote Number | Read-only column | Displays quote number. |
| Customer Name | Read-only column | Displays customer name. |
| Account | Read-only column | Displays customer account. |
| Contact Name | Read-only column | Displays contact name. |
| Status | Read-only column | Displays quote status. |
| Web Published | Read-only column | Displays if quote is web published. |
| Expiration Date | Read-only column | Displays expiration date of quote. |
| Quote Total | Read-only column | Displays quote total. |
| Opportunity Name | Read-only column | Displays opportunity name. |
| Order Number | Read-only column | Displays order number. |

Table B-42 Quote, Customer Search Form > Quote View Components

| Component | Type | Description |
|---------------|------------------|---|
| Quote Version | Read-only column | Displays quote version. |
| View | Button | Displays selected quote. |
| New Quote | Button | Accesses the Oracle Quoting form. |
| Advanced | Tab | Area where you conduct an advanced search for the quote. |
| Item | LOV text field | Enter or select a search parameter. The parameters are: customer name, customer type, account number, contact name, quote name, quote number, quote version, quote status, product, expiration date, po number, opportunity name, opportunity number, phone number (Quote To customer), currency, price list, order type, agreement, quote amount, creation date, update date, web published, primary salesperson, primary sales group, salesperson, sales group, sales channel, and source name. |
| Condition | LOV text field | Enter or select a search condition. The conditions are: Less Than, Equal To, Greater Than, and Like . Note: The value <i>Like</i> implies a keyword% search. |
| Value | Text field | Enter a value for the parameter selected in the item field. |
| Search | Button | Executes search. |
| Close | Button | Closes the Quote, Customer Search form. |
| Clear | Button | Clears the search criteria fields. |
| Results | Section | Displays results of the Quote search. |
| Quote Name | Read-only column | Displays quote name. |
| Quote Number | Read-only column | Displays quote number. |
| Customer Name | Read-only column | Displays customer name. |
| Account | Read-only column | Displays customer account. |

Table B-42 Quote, Customer Search Form > Quote View Components

| Component | Type | Description |
|------------------|------------------|-------------------------------------|
| Contact Name | Read-only column | Displays contact name. |
| Status | Read-only column | Displays quote status. |
| Web Published | Read-only column | Displays if quote is web published. |
| Expiration Date | Read-only column | Displays expiration date of quote. |
| Quote Total | Read-only column | Displays quote total. |
| Opportunity Name | Read-only column | Displays opportunity name. |
| Order Number | Read-only column | Displays order number. |
| Quote Version | Read-only column | Displays quote version. |
| View | Button | Displays selected quote. |
| New Quote | Button | Accesses the Oracle Quoting form. |

See Also:

- [Section 21.2, "Searching for Quotes"](#)

B.38 Quote, Customer Search Form > Organization View

Use this form to search for quotes or customers of type **Organization**.

The following table describes the components on the Quote, Customer Search Form > Organization view

Table B-43 Quote, Customer Search Form > Organization View Components

| Component | Type | Description |
|-------------------------|----------------|---|
| Find | Drop-down menu | Select a search method. Possible values are: Quote, Organization, Person . Defaults to Quote unless invoked from the Quote To customer, Quote To account, or Quote To contact fields. In these cases, defaults to Organization . |
| Folder Icon | Button | Opens the private and public folders created by the user. |
| Customer Name | LOV text field | Enter or select a customer name by which to search. If ASO: View Customers Without Accounts is set to Yes , LOV shows all parties of type Organization that match the text entered. If ASO: View Customers Without Accounts is set to No , LOV shows parties of type Organization that match the text entered and have active accounts. |
| Account Number | LOV text field | Enter or select an account number by which to search. LOV lists active accounts for the customers matching the account number entered. |
| Taxpayer ID | Text field | Enter a taxpayer ID by which to search. Also known as fiscal code or NIF. |
| Tax Registration Number | Text field | Enter a tax registration number by which to search. Also known as VAT number. |
| Contact Last Name | Text field | Enter a contact last name by which to search. |
| Contact First Name | Text field | Enter a contact first name by which to search. |
| Contact Phone | Text field | Enter a contact phone number by which to search. |
| Original Reference | Text field | Enter a customer reference by which to search. An original reference is the customer identifier in the external system from which the customer was imported. |

Table B–43 Quote, Customer Search Form > Organization View Components

| Component | Type | Description |
|------------------|------------------|--|
| Fuzzy Search | Button | Executes a fuzzy search. Fuzzy search functionality is provided by TCA. Displays an error message if the number of search results exceeds the setting ASO: Max Number of Results in Search . |
| Exact Search | Button | Executes an exact search. Displays an error message if the number of search results exceeds the setting ASO: Max Number of Results in Search . |
| Close | Button | Closes the form and returns user to the Oracle Quoting form. |
| Clear | Button | Clears all search fields. |
| Results | Section | Displays results of the search. |
| Customer Name | Read-only column | Displays the customer name. |
| Account | Read-only column | Displays the customer account. |
| Contact Name | Read-only column | Displays the contact name. |
| Contact Phone | Read-only column | Displays the contact phone. |
| Apply to Quote | Button | Accesses the Oracle Quoting form and applies search results to it. |

See Also:

[Section 21.3, "Searching for Customers"](#)

B.39 Quote, Customer Search Form > Person View

Use this form to search for quotes or customers of type **Person**.

The following table describes the components on the Quote, Customer Search form > Person view.

Table B-44 Quote, Customer Search Form > Person View Components

| Component | Type | Description |
|-------------------------|----------------|---|
| Find | Drop-down menu | Select a search method. Possible values are: Quote , Organization , Person . Defaults to Quote unless invoked from the Quote To customer, Quote To account, or Quote To contact fields. In these cases, defaults to Organization . |
| Folder Icon | Button | Opens the private and public folders created by the user. |
| First Name | Text field | Enter a first name by which to search. |
| Last Name | Text field | Enter a last name by which to search. |
| Account Number | LOV text field | Enter or select an account number by which to search. LOV lists active accounts for the customer matching the account number entered. |
| Phone | Text field | Enter a phone number by which to search. |
| Taxpayer ID | Text field | Enter a taxpayer ID by which to search. Also known as fiscal code or NIF. |
| Tax Registration Number | Text field | Enter a tax registration number by which to search. Also known as VAT number. |
| Original Reference | Text field | Enter a customer reference by which to search. An original reference is the customer identifier in the external system from which the customer was imported. |
| Fuzzy Search | Button | Executes a fuzzy search. Fuzzy search functionality is provided by TCA. Displays an error message if the number of search results exceeds the setting ASO: Max Number of Results in Search . |
| Exact Search | Button | Executes an exact search. Displays an error message if the number of search results exceeds the setting ASO: Max Number of Results in Search . |
| Close | Button | Closes the form. |
| Clear | Button | Clears all search fields. |
| Results | Section | Displays results of the Person search. |

Table B–44 Quote, Customer Search Form > Person View Components

| Component | Type | Description |
|----------------|------------------|--|
| Customer Name | Read-only column | Displays the customer name. |
| Account | Read-only column | Displays the account number. |
| Last Name | Read-only column | Displays the last name. |
| Phone | Read-only column | Displays the phone number. |
| Apply to Quote | Button | Applies the selected customer to the quote. Displays the Quoting form. |

See Also:

- [Section 21.3, "Searching for Customers"](#)

B.40 Create Quote From Opportunity Form

Use the Create Quote From Opportunity in Oracle Telesales to create a quote from an opportunity.

The following table describes the components on the Create Quote From Opportunity form in Oracle Telesales.

Table B–45 Create Quote From Opportunity Form Components

| Component | Type | Description |
|-------------------|-----------------|---|
| Quote Information | Section | Fields pertaining to quote information. |
| Quote Name | Text field | Enter a name for the quote. |
| Quote Number | Read-only field | Quote number is generated after the quote has been saved. |
| Expires On | Date field | Enter the date when the quote expires. |
| Order Type | LOV text field | Enter or select the order type for the quote. |
| Agreement | LOV text field | Enter or select the agreement for the quote. |
| Price List | LOV text field | Enter or select the price list for the quote. |

Table B-45 Create Quote From Opportunity Form Components

| Component | Type | Description |
|----------------------|-----------------|---|
| Currency | LOV text field | Enter or select the currency. Defaults to the currency of the default price list, and then to the currency in the opportunity. |
| Contract Template | LOV text field | Enter or select the contract template for the quote. |
| Sales Information | Section | Fields pertaining to sales information. |
| Salesperson | LOV text field | Enter or select the salesperson for the quote. |
| Sales Group | LOV text field | Enter or select the sales group for the quote. |
| Opportunity | Read-only field | Displays the opportunity name. |
| Sales Channel | LOV text field | Enter or select the sales channel. Defaults to the value of the source opportunity. |
| Source Name | LOV text field | Enter or select the source name. Defaults to the source code in the source opportunity. |
| Customer Information | Section | Fields pertaining to customer information. |
| Customer | Read-only field | Displays the quote customer. |
| Account | LOV text field | Enter or select the account number for the quote customer. Mandatory if the Quote To customer has an active account. |
| Contact | LOV text field | Enter or select the contact for the quote customer. |
| Address | LOV text field | Enter or select the address for the quote customer. |
| Oval Button | Button | Displays the Address Details form: address name, address lines 1 - 4, address phonetic, PO box, suite, city, state, postal code, county, province, country, timezone. |
| City | Read-only field | Displays the address city. |
| State | Read-only field | Displays the address state. |
| Postal Code | Read-only field | Displays the address postal code. |
| County | Read-only field | Displays the address county. |
| Province | Read-only field | Displays the address province. |
| Country | Read-only field | Displays the address country. |

Table B–45 Create Quote From Opportunity Form Components

| Component | Type | Description |
|------------------|--------------------|---|
| Copy Tasks | Read-only checkbox | Select to copy tasks from the opportunity to the quote. |
| Copy Notes | Read-only checkbox | Select to copy notes from the opportunity to the quote. |
| Copy Attachments | Read-only checkbox | Select to copy attachments from the opportunity to the quote. |
| Create Quote | Button | Creates a quote from the opportunity and displays the quote in the Oracle Quoting form. |
| Cancel | Button | Cancels the create quote from opportunity process and returns user to Oracle Telesales. |

See Also:

- [Section 20.3, "Creating a Quote From an Opportunity"](#)

B.41 Order Confirmation Form

The Order Confirmation form appears after an order has been placed.

The following table describes the components on the Order Confirmation form.

Table B–46 Order Confirmation Form Components

| Component | Type | Description |
|------------------|-----------------|--------------------------------------|
| Order Number | Read-only field | Displays the order number. |
| Shipping Method | Read-only field | Displays the shipping method. |
| Order Total | Read-only field | Displays the order total. |
| Currency | Read-only field | Displays the currency. |
| Ship To | Section | Displays the Ship To address details |
| Customer | Read-only field | Displays the Ship To customer. |
| Account | Read-only field | Displays the Ship To account number. |
| Contact | Read-only field | Displays the Ship To contact. |
| Address | Read-only field | Displays the Ship To address. |
| Oval Button | Button | Accesses the Address Detail form. |

Table B–46 Order Confirmation Form Components

| Component | Type | Description |
|-------------|-----------------|---|
| City | Read-only field | Displays the Ship To city. |
| State | Read-only field | Displays the Ship To state. |
| Postal Code | Read-only field | Displays the Ship To postal code. |
| Country | Read-only field | Displays the Ship To country code. |
| OK | Button | Closes the form and return the user to the Oracle Quoting form. |

See Also:

- [Section 33.2, "Placing an Order"](#)

B.42 Quote Status Setup

Use this form to define quote statuses and quote status transitions.

The following table describes the components on the Quote Status Setup forms.

Table B–47 Quote Status Form Components

| Component | Type | Description |
|----------------|------------|--|
| Quote Statuses | Section | Displays quote status information. |
| Code | Text field | Enter a code for the status. Read only if the status is not user maintainable. |
| Name | Text field | Enter a name for the status. |
| Description | Text field | Enter a status description. Read only if the status is not user maintainable. |
| Update Allowed | Checkbox | Indicates if the status is read-only or updateable. Read only if the status is not user maintainable. |
| Auto Version | Checkbox | Determines if a transition to the status automatically creates a new version. |
| Enabled | Checkbox | Determines if the status is user maintainable. If the status is not user maintainable, this field is not updateable. |

Table B–47 Quote Status Form Components

| Component | Type | Description |
|------------------------------|-----------------|--|
| Allowed Transition to Status | Section | Displays quote status transition information. |
| Code | LOV text field | Select the status to which you want to transition. Read only if the status transition is a system driven transition. |
| Name | Read-only field | Displays the status name. |
| Description | Read-only field | Displays the status description. |
| Transitioned by | Read-only field | Displays the transition root. Displays USER if a transition to that state can be done from either the user interface or application. For example, you can change the status using an LOV. Quoting automatically populates this field with USER , if you create a new status transition. Displays APPLICATION if a transition can only be triggered by an event occurring in the application, for example, placing an order. |
| Enabled | Checkbox | Determines if the transaction is allowed. |

See Also:

- [Section 20.1.1, "Understanding Quotes"](#)
- [Section 20.1.2, "Quote Status"](#)

B.43 Sales Supplement Setup

Use this form to set up Sales Supplement templates.

The following table describes the components on the Templates tab of the Sales Supplement form.

Table B–48 Sales Supplement - Templates Tab Components

| Component | Type | Description |
|-----------|------------|--------------------------------|
| Template | Section | Displays template information. |
| Name | Text field | Enter a template name. |

Table B–48 Sales Supplement - Templates Tab Components

| Component | Type | Description |
|-------------|------------|---|
| Description | Text field | Enter a description for the template. |
| Sections | Section | Displays information about the template sections. |
| Sequence | Text field | Enter the sequence in which the sections appear. |
| Name | LOV field | Enter the section name. |

The following table describes the components on the Sections tab of the Sales Supplement form.

Table B–49 Sales Supplement - Sections Tab Components

| Component | Type | Description |
|--------------------|----------------|---|
| Section | Section | Displays section information. |
| Name | Text field | Enter the section name. |
| Description | Text field | Enter a description for the section. |
| Component Type | LOV text field | Enter or select a component type for the section. |
| Response Type | LOV text field | Enter or select a response type for the section. |
| Instruction | Text field | Enter an instruction for the section. |
| Components | Section | Displays component information. |
| Sequence | Numeric field | Enter the sequence in which the components appear. |
| Component Name | LOV text field | Select the component name. Values are all components with the type Component . |
| Presentation Style | LOV text field | Select the presentation style. Values are Checkbox , List of Values , List of Values with Blank , Radio Group , and Text . Available only if type is Component , component type is Question , and response type is Predefined Response . |

Table B–49 Sales Supplement - Sections Tab Components

| Component | Type | Description |
|---------------|----------------|--|
| Default Value | LOV text field | Select a default value. Values are all responses in the component-response set. Available only if type is Component , component type is Question , and response type is Predefined Response . Mandatory if presentation style is drop-down without blank. |

The following table describes the components on the Components tab of the Sales Supplement form.

Table B–50 Sales Supplement - Components Tab Components

| Component | Type | Description |
|----------------|----------------|---|
| Component | Section | Displays component information. |
| Name | Text field | Enter a component name. Mandatory field. |
| Description | Text field | Enter a description for the component. |
| Component Type | LOV text field | Enter or select a component type for the section. |
| Response Type | LOV text field | Enter or select a response type for the section. |
| Instruction | Text field | Enter an instruction for the section. |
| Responses | Section | Displays response information. |
| Sequence | Text field | Enter the sequence in which the responses appear. |
| Response | LOV text field | Enter or select a response from a list of predefined responses. |

The following table describes the components on the Responses tab of the Sales Supplement form.

Table B–51 Sales Supplement - Responses Tab Components

| Component | Type | Description |
|-----------|------------|---------------|
| Name | Text field | Enter a name. |

Table B-51 Sales Supplement - Responses Tab Components

| Component | Type | Description |
|------------------|-------------|-------------------------------|
| Description | Text field | Enter a response description. |

Glossary

Advanced Pricing

A member of the Oracle Order Management and Logistics application module. It is integrated within Oracle Quoting, as a setup mechanism and pricing engine that executes pricing and promotional calculations for Order Management.

AK region

Area where a user with Application Developer Common Module can customize specific areas of responsibility and modify LOVs, drop down menus, buttons, and regions in the HTML UI.

API

An Application Programming Interface (API) is a published interface to accomplish a business or scientific function. An API defines a contract to its users by guaranteeing a published interface, but hides its implementation details.

Approval Canceled

A seeded quote status in Oracle Quoting, indicating that the sales representative has canceled the approval process.

Approval Pending

A seeded quote status in Oracle Quoting, indicating that the quote is pending approval, and is read-only.

Approval Rejected

A seeded quote status in Oracle Quoting, indicating that the approval has been rejected by the approvers.

Approved

A seeded quote status in Oracle Quoting, indicating that the quote has been approved by the necessary approvers.

ATP

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

AR

Oracle Accounts Receivable, which is a component of the Oracle Financials application module.

availability

The percentage or amount of scheduled time that a computing system provides application service.

attachments

Attachments such as documents or URLs for a single line item on a quote.

batch pricing

The entire quote is priced including any manual/automatic adjustments, pricing qualifiers, pricing attributes and promotions via a concurrent manager in the Advanced Pricing module. The quote is considered fully priced after such a pricing call.

Bill To customer

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

BLAF

Browser look and feel.

BOM item type

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

button

An object on the UI that accesses a form when the user places the cursor on top of it and clicks on it.

child

Referring to an itemized level that is below a referenced level.

concatenation

Information from two fields merged together in the output.

Configurator

A member for the Oracle Order Management and Logistics application module. It is integrated within Oracle Quoting, and allows customers to pick related products to products they have already selected and configure model products.

contact

A contact is an individual that represents an organization.

Contract Canceled

A seeded quote status in Oracle Quoting, indicating that the contract has been canceled by the contract administrator.

Contract Pending

A seeded quote status in Oracle Quoting, indicating that the contract is in review with the contract specialist.

Contract Required

A seeded quote status in Oracle Quoting, indicating that the contract specialist needs to author and approve a contract after the approval process.

container model

Model where associated components are dynamically selected based on user action and Configurator rules.

contract

An agreement between the seller and the end user whereby the end user agrees to purchase the seller's licenses, products and services per the conditions of the seller's current standard agreement.

credit check

Ability to gauge customer credit worthiness during the quoting process. Oracle Order Management's credit check is integrated with Quoting.

cross-sell

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

date field

A field in which the user may only enter or select a date.

descriptive flexfield

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

discount

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

Draft

A seeded quote status in Oracle Quoting, indicating the initial status of the quote.

financial account

Information for a customer that provides their Quote To, Bill To, Ship To and Sold To information. Also provides an account number for the customer.

Forms UI

User interface developed with a Forms based platform.

fuzzy search

Widens the scope of a search and finds data comparable to the search criteria. The fuzzy search method uses Word Replacement Rules to map a word, abbreviation, or special character that might be entered by a user as a search criteria to a similar word.

header level

Level of information for a quote that contains information not related to individual products, licenses, services, or prices.

HTML UI

User interface developed on an HTML platform.

Inactive

A seeded quote status in Oracle Quoting indicating that no further activity is allowed on the quote.

installed base

A customer's installed base lists the products and services installed at the customer site.

instance

A single representation of an item.

Intermedia

A text search utility that allows keyword searches for greater flexibility when conducting searches.

item attribute

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

line level

All information associated with a line. It can include price list, adjustment, sales credit, and tax detail information.

lost

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

LOV

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

LOV text field

A field where the user may either choose a value from an LOV, or type in the name of the value. The typed value must be a value existing in the LOV.

mandatory field

Field that must be filled out by the user in order to move to the next field or form.

multiple instantiation

The ability to configure a child model of a top level multiple times in the same configuration. The child model is only listed in the BOM once but can be spawned as many times as needed in the configuration.

non-quota sales credit

See [non-revenue sales credit](#).

non-revenue sales credit

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

non-standard contract

A contract that has atypical terms and conditions for purchasing software, products and services. Non-standard contracts must go through the approvals process before a quote will be provided with a non-standard contract.

numeric field

A field where the user may only enter numeric values.

optional field

Field that is not required by the user to filled in order to move to the next field or form.

opportunity

An opportunity is created in Oracle Sales Online or Oracle Telesales, whereby a sales representative initiates the sales process with initial customer contact, or lead, and ends when the sales representative creates a sale or loses the sale. The stored information is stored as an opportunity. Opportunities can be converted into quotes in Oracle Quoting.

Order Submitted

A seeded quote status in Oracle Quoting indicating that the quote has been submitted as an order to Oracle Order Management.

order type

An order transaction type can be for any of the following order categories: **ORDER**, **RETURN** or **MIXED**. Line transaction types can be for any of the categories: **ORDER** or **RETURN**. When an order is created with a particular transaction type, the order category code determines which lines are permitted for that order. If the category code is **ORDER**, then the order can have only regular Lines. If the category code is **RETURN**, then the order can have only return lines. If the category code is **MIXED**, then the order can have both kinds of lines.

partial configuration

The ability to modify part of an existing configuration without launching the entire configuration in Configurator.

price list

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

product number

Unique instance identifier in Installed Base.

profile option

Features in the Oracle Quoting application that one can set to affect the appearance, performance and functionality of the application according to each user. Can also be set at site, application and responsibility levels.

quota sales credits

See [revenue sales credit](#), [non-revenue sales credit](#).

quote

A quote is an offer to a customer that contains priced items and shows a total price for the offer. You create a quote when you accumulate items and any associated services and save it.

Quote To customer

The person or organization for whom the quote is being created for.

quote number

Oracle Quoting automatically assigns a quote number to the quote if the profile option **ASO: Automatic Numbering** is set to **Yes**. The quote number is composed of the quote number itself and a version number that increments each time a new quote version is created.

quote status

The quote status indicates the stage of preparation that a quote is in. There are seeded quote statuses: **Approval Canceled, Approval Pending, Approval Rejected, Approved, Contract Canceled, Contract Pending, Contract Required, Draft, Inactive, Order Submitted, and Store Draft.**

quote version

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

read-only field

Changes cannot be made to the information, if any, in a read-only field, it can only be viewed.

reconfigure

The ability to make changes to a configured model that has already been purchased by the Quote To customer.

related items

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

re-order

The customer is purchasing a model with the same configuration from a previous order.

resources

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

returnable

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

revenue sales credit

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

role

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

role types

A collection of roles associated with a particular CRM module.

search string

Parameters entered into the criteria field when a user conducts a search.

section

A part of the form that is delineated from the other parts of the form by borders and/or a category name for the section.

seeded

Data already included and/or already a part of the standard Oracle Quoting application.

serviceable, serviceable item

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

service reference

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

shippable

An item attribute indicating that the item can be shipped.

Ship To customer

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

shopping cart

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

Sold To customer

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

standard contract

A contract that has Oracle's typical terms and conditions for purchasing Oracle software, products and services.

Store Draft

A seeded quote status in Oracle Quoting that indicates the quote is for Oracle iStore internal use only. Allows Oracle iStore to have a Draft to Order flow that is separate from Oracle Quoting.

substitute

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

surcharge

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

system administrator

Individuals who have the ability to set profile options and define users.

taxpayer identification number

Also known as fiscal code or NIF.

taxpayer registration number

Also known as Value Added Tax (VAT) number.

tax exempt

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

TeleSales

An application which is part of the Oracle Sales application module. It integrates with Oracle Quoting to complete the Opportunity to Quote to Order sales cycle.

trade-in, trade-in item

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

UI

User Interface.

UOM

Unit of measure.

up-sell

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

web publish

Publishing a quote to a customer via the web, where the quote can be viewed by the customer via web instead of a hard copy or fax.

wildcard

A special character within a search parameter that tells the application to search for all records that are similar to the search parameter. In Oracle Quoting, % is the wildcard character. For example, if you enter **order%** as a quote name search parameter, the application returns all quotes with names that begin with **order**.

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