

Oracle® Quoting

Implementation Guide

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Oracle Quoting Implementation Guide, Release 11i

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

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Preface

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

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

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

If you have never used Oracle Quoting, Oracle suggests you attend one or more of the Oracle Quoting training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- 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

The *Oracle Quoting Implementation Guide* contains the information you need to understand and use Oracle Quoting.

- [Chapter 1](#) provides an overview of Oracle Quoting.
- [Chapter 2](#) describes the setup tasks that you need to perform in Oracle Applications for Oracle Quoting.

- [Chapter 3](#) describes the setup tasks that you need to perform in Oracle Receivables for Credit Memo Request Workflow.
- [Chapter 4](#) describes the tasks that you can perform to configure Oracle Quoting to suit your business requirements.
- [Chapter 5](#) describes the set up necessary if using the Web Publishing functionality.
- [Chapter 6](#) lists the steps required to implement approvals functionality through integration with Oracle Approvals Management.
- [Chapter 7](#) describes the set up steps required to use Contracts functionality.
- [Chapter 8](#) describes sales credit allocation and projected commission functionalities and lists the steps necessary to integrate with Oracle Incentive Compensation.
- [Chapter 9](#) lists the setup steps necessary to implement automatic sales team assignment through integration with Oracle Territory Manager.
- [Appendix A](#) lists all Quoting profile options.
- [Appendix B](#) lists the seeded roles and responsibilities required to implement Quoting.
- [Appendix C](#) provides possible security scenarios and demonstrates appropriate set up.
- [Appendix D](#) lists the seeded caches for Quoting (HTML only).
- [Appendix E](#) lists the seeded lookup types for Quoting.
- [Appendix F](#) lists the approvals-related, seeded attributes for Oracle Approvals Management.
- [Appendix G](#) describes the category set usage in Quoting.

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Other Information Sources

You can choose from many sources of information, including 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).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11*i* Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

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

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

Oracle Quoting User Guide

This manual provides information on how to use Oracle Quoting. It includes procedural information for both the Forms and HTML user interfaces (UI), describing in detail how to use each functionality in each UI.

Oracle *interMedia* User's Guide and Reference

This user guide and reference provides information about Oracle *interMedia*. This product enables Oracle9i to store, manage, and retrieve geographic location information, images, audio, video, or other heterogeneous media data in an integrated fashion with other enterprise information. Oracle Trading Community Architecture Data Quality Management uses *interMedia* indexes to facilitate search and matching.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle 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 guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software

updates, refer to the "About" document for your product. "About" documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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 Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products

between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

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 guide 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 Oracle *Metalink*

Oracle Applications Message Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Quoting and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Quoting working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Oracle*MetaLink*

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *OracleMetaLink*, 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 develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

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

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

Introduction

This chapter provides information on the following topics:

- [Section 1.1, "Oracle Quoting Overview"](#)
- [Section 1.2, "New in this Release"](#)

1.1 Oracle Quoting Overview

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

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

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

1.1.1 Oracle Quoting Features

Oracle Quoting allows you to:

- Add configured products to quote (including guided selling)
- Add service products to quote

- Administer contract terms directly on a quote
- Allocate sales credits
- Authorize credit card payment
- Check availability of products
- Comply with Latin American Tax Requirements
- Control quote access and update with quote security
- Convert quotes to orders
- Copy existing quotes
- Copy quote lines
- Create notes, tasks (HTML only), and attachments
- Create quote from opportunity
- Create quotes from templates (HTML only)
- Default Shipping and Billing Information
- Display Line-Level Charges
- Enforce key business practices in the sales cycle with enhanced quote status and transition model
- Initiate approvals, using the Oracle Approvals engine, with out-of-the-box notifications
- Perform customer credit checks
- Perform Quote Pricing and Tax Calculation on Request
- Perform Terms Substitutions
- Print quotes in PDF and RTF formats with enhanced printing
- Quote to Prospects
- Restrict salesperson's quote creation ability to specific customers
- Save/personalize quote searches (HTML only) and use advanced search capabilities
- Search Customer Install Base for Trade-Ins
- Search customer Install Base and Pending Orders for products to which you can apply services

- Search for products using Oracle 8i interMedia
- Share quotes with customers via the Oracle iStore web storefront
- Solution-Based Modeling
- Split a line
- Support flexible pricing within a quote including manual price overrides

HTML UI Only

- Customize Columns
- Integrate with Oracle Proposals

Forms UI Only

- Folder Technology for Customizing Columns
- Perform Basic and Advanced Quote Searches

1.2 New in this Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 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 *OracleMetaLink* for relevant product patches and documentation.

The following functionality is new in this release:

- Ability to change currency after quote creation
- Ability to change order type after quote creation
- Add quote templates to existing quotes
- Allow contract terms to be added, negotiated, and displayed with and printed on the quote through enhanced integration with Sales Contracts
- Automatic territory assignment
- Automatic sales credit allocation
- Display tax rate on quote print out
- Estimated compensation
- Multi-currency price lists

- Sales group-based quote access
- Sales supplement on print out
- Support for *Buy One, Get One Free* (promotional goods)
- Support for line level sales supplements
- Update line level pricing agreements

HTML UI Only

- Link to line level flexfields
- Navigation to header level flexfields
- Shipping details exposed

Forms UI Only

- Additional information in the Pricing adjustments form
- Header and line level charges
- Quote templates
- Sales supplements - Header and line level
- Telco reconfiguration functionality
- Trade-in from Installed Base

Verify Mandatory Dependencies

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

- [Section 2.1, "Oracle Quoting Mandatory Dependencies"](#)
- [Section 2.2, "Oracle Quoting Optional Integrations"](#)
- [Section 2.3, "How to Verify Specific Set Ups for Dependencies"](#)

2.1 Oracle Quoting Mandatory Dependencies

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

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

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

- **Oracle Inventory** — Provides all product information. Refer to the *Oracle Inventory User's Guide* for complete setup information.
- **Oracle Order Management** — Allows creation of orders from quotes. Refer to the *Oracle Order Management Suite Implementation Manual* for complete setup information.

2.1.1 Setting up Oracle Receivables

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

2.1.2 Setting up Address Locations

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

Login

Log in to Oracle Forms.

Responsibility

Receivables Manager

Steps

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

2.1.3 Address Formats

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

To set up country specific address formats in Oracle Receivables:

Login

Log in to Oracle Forms.

Responsibility

Receivables Manager

Steps

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

The Countries and Territories window opens.

2. Search for country as follows:

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

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

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

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

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

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

4. Save the form.

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

2.1.4 Setting up Oracle Advanced Pricing

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

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

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

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

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

Terms Substitution Modifiers

Oracle Quoting supports the use of terms substitution modifiers. If a user wants a particular terms substitution modifier applied, the user must set up the modifier so that it takes precedence. When using terms substitution modifiers in Quoting, you will observe the following behavior when a pricing call is made:

- If there are multiple terms substitution modifiers of the same type with no designated precedence, Oracle Pricing passes all qualified terms substitution modifiers. Oracle Quoting randomly selects one of the terms substitution modifiers and applies it to the quote.
- If there are multiple terms substitution modifiers of the same type with a designated precedence, Oracle Pricing passes one modifier, which Oracle Quoting applies to the quote.

Attributes

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

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

Attributes Supported by Oracle Quoting

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

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Customer	Account Type	Line/Header	Qualifier
Customer	Agreement Name	Line/Header	Qualifier
Customer	Agreement Type	Line/Header	Qualifier
Customer	Bill To	Line/Header	Qualifier
Customer	Customer Class	Line/Header	Qualifier
Customer	Customer Name	Line/Header	Qualifier
Customer	GSA Indicator	Line/Header	Qualifier
Customer	Invoice To Party Site	Line/Header	Qualifier
Customer	Party Id	Line/Header	Qualifier
Customer	Sales Channel	Line/Header	Qualifier
Customer	Ship To	Line/Header	Qualifier
Customer	Ship To Party Site	Line/Header	Qualifier
Customer	Site Use Id	Line/Header	Qualifier
Item	ALL_ITEMS	Line	Pricing
Item	Inventory Item Id	Line	Pricing
Item	Item Category	Line	Pricing
Item	Segment 1 (Key item flexfield segments)	Line	Pricing
Item	Segment 2	Line	Pricing
Item	Segment 3	Line	Pricing
Item	Segment 4	Line	Pricing
Item	Segment 5	Line	Pricing
Item	Segment 6	Line	Pricing
Item	Segment 7	Line	Pricing
Item	Segment 8	Line	Pricing
Item	Segment 9	Line	Pricing
Item	Segment 10	Line	Pricing

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Item	Segment 11	Line	Pricing
Item	Segment 12	Line	Pricing
Item	Segment 13	Line	Pricing
Item	Segment 14	Line	Pricing
Item	Segment 15	Line	Pricing
Item	Segment 16	Line	Pricing
Item	Segment 17	Line	Pricing
Item	Segment 18	Line	Pricing
Item	Segment 19	Line	Pricing
Item	Segment 20	Line	Pricing
Line Volume	Item Amount	Line	Pricing
Line Volume	Item Quantity	Line	Pricing
Line Volume	Period1 Item Quantity	Line	Pricing
Line Volume	Period2 Item Quantity	Line	Pricing
Line Volume	Period3 Item Quantity	Line	Pricing
Modlist	Price List	Line/Header	Qualifier
Modlist	Promotion Number	Line/Header	Qualifier
Order	Customer PO	Line	Qualifier
Order	Line Category	Line	Qualifier
Order	Line Type	Line	Qualifier
Order	Order Category	Line	Qualifier
Order	Order Type	Line/Header	Qualifier
Order	Pricing Date	Line	Qualifier
Order	Request Date	Line	Qualifier
Order	Shippable Flag	Line/Header	Qualifier

Table 2–1 Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Pricing Attributes	Model Id	Line	Pricing
Pricing Attributes	Parent List Price	Line	Pricing
Segment	Market Segment	Line/Header	Qualifier
Segment	Target Segment	Line/Header	Qualifier
Terms	Payment Terms	Line/Header	Qualifier
Terms	Shipping Terms	Line/Header	Qualifier
Territory	Territory	Line/Header	Qualifier
Volume	Line Volume	Line	Qualifier
Volume	Line Weight	Line	Qualifier
Volume	Order Amount	Header	Qualifier
Volume	Order Qty	Line	Qualifier

2.1.5 Setting up Oracle General Ledger

When setting up Oracle General Ledger, you must define:

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

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

2.1.6 Setting up Oracle Inventory

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

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

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

Note: Please note that if Oracle interMedia is enabled and you add new products to you Inventory, these products will not show up in the Quoting UI until you run the iStore Search Insert concurrent program. See [Section 4.20.1, "Running iStore Search Insert"](#) for more information.

2.1.7 Setting up Oracle Order Management

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

Setting up the Default Item Validation Organization

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

Setting up Shipping Methods in Oracle Order Management

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

Assign Workflow to the Transaction Type Selected in ASO: Default Order Type
To assign workflow for the transaction type you select in **ASO: Default Order Type**:

Login

Login to Oracle Forms.

Responsibility

Oracle Order Management Super User

Prerequisites

You must have a transaction type set up.

Steps

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

2.2 Oracle Quoting Optional Integrations

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

- **Oracle Advanced Planning and Scheduling** — Provides Availability to Promise (ATP) information. Refer to the *Oracle Advanced Planning Implementation and User's Guide* for more information.
- **Oracle Approvals Management** — Allows users to create an approval chain. Refer to the *Oracle Approvals Management Implementation Guide* for complete setup information.
- **Oracle Configurator** — Configures model items. Refer to the *Oracle Configurator Installation Guide* and *Oracle Configurator Implementation Guide* for complete setup information.
- **Oracle iPayment** — Enables credit card authorizations. Refer to the *Oracle iPayment Implementation Guide* for complete setup information.
- **Oracle iStore** — Allows sales representatives to publish quotes to a storefront, and customers to request assistance with shopping carts from sales representatives using Quoting and to use interMedia search functionality in Quoting.

- **Oracle Incentive Compensation** — Calculates sales credit allocations for quotes and determines users' projected commission. Refer to the *Oracle Incentive Compensation Implementation Guide* for setup information.
- **Oracle Install Base** — Provides a list of all customer's products and installation details. Refer to the *Oracle Install Base Implementation Guide* for complete setup information.
- **Oracle Proposals** — Allows sales representatives to create customized proposals to distribute to customers. Refer to the *Oracle Proposals Implementation Guide* for setup information.
- **Oracle Reports Developer 6i** — Enables development of print quote. Refer to *Oracle Reports Developer Building Reports* and *Oracle Reports Developer Publishing Reports*.
- **Oracle Reports Server** — Centralizes report processing. Oracle Reports Server must be configured for quote printing. Refer to *Oracle Reports Developer Getting Started* for complete setup information.
- **Oracle Sales Contracts** — Enables users to include standard and non-standard contract terms on a quote. Refer to the *Oracle Contracts Implementation and Administration Guide* for more information.
- **Oracle Field Sales** — Allows sales representatives to create quotes in a campaign-to-order business flow from the HTML UI. Refer to the *Oracle Field Sales Implementation Guide* for complete setup information.
- **Oracle Service Contracts** — Provides contract details for service items. Refer to the *Oracle Contracts for Service Implementation Guide* for complete setup information.
- **Oracle TeleSales** — Allows sales representatives to create quotes in a campaign-to-order business flow from the Forms UI. Refer to the *Oracle TeleSales Implementation Guide* for complete setup information.
- **Oracle Territory Manager** — Assigns sales teams to quotes based on sales territory definitions. Refer to the *Oracle Territory Manager Implementation Guide* for complete setup information.
- **Oracle XML Publisher** — Allows quote printouts to be produced using XDO (XML/XSL) technology. This is mandatory in order to print quotes with contract terms.
- **Oracle Workflow** — Provides notifications related to Approvals integration. Refer to the latest version of the *Oracle Workflow Guide* for more information.

2.3 How to Verify Specific Set Ups for Dependencies

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

Oracle CRM Application Foundation Implementation Verification Checklist

Implementation Overview

3.1 Oracle Quoting Implementation Overview

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

- [Section 3.1.1, "Process Description"](#)
- [Section 3.1.2, "Implementation Task Sequence"](#)

3.1.1 Process Description

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

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

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

For enhanced functionality, set up the following:

- Security
- Web publishing
- Sales supplement templates
- Sidebar menu (HTML UI)
- Approvals
- Sales Contracts

- Credit Checking
- interMedia Search
- Sales Team Assignments
- Sales Credit Allocation
- Projected Commission

Note: If you are implementing Oracle Quoting in a multi-org environment, please refer to the *Multiple Organizations in Oracle Applications* manual available on [OracleMetaLink](#).

3.1.2 Implementation Task Sequence

The following table describes the implementation process for Oracle Quoting.

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Responsibility
1	Set up quote status and quote status transitions. Define new or modify seeded quote statuses, status transitions, and extensibility rules based on business needs.	Yes	Quoting Sales Manager
2	Set up system profile options. Define system profile values. These affect the way Oracle Quoting looks and performs.	Yes	System Administrator
3	Enable cache in the HTML UI. Setup is mandatory for Quoting - HTML.	Yes	System Administrator
4	Assign a seeded or customized Oracle Quoting responsibility to user.	Yes	System Administrator
5	Set up default expiration date using one of the available methods.	Yes	System Administrator

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Responsibility
	Modifying seeded lookup types Some seeded lookups types are extensible and can be modified.	Optional	Quoting Sales Manager Application Developer
	Set up overrideable modifiers in Oracle Advanced Pricing if ASO: Discounting Privilege is set to Full .	Mandatory if using manual discounts or surcharges	Oracle Pricing Manager
	Set up other modifiers in Advanced Pricing	Optional	Oracle Pricing Manager
	Set up multi-currency price lists	Optional	Oracle Pricing Manager
	Set up the Sidebar Menu (HTML). Customize the menu if you disable any functionality.	Optional	Application Developer
	Customize the Lines page (HTML).	Optional	Applications Developer Common Modules
	Disable Actions menus and buttons (HTML).	Optional	Quoting Sales Manager
	Customize the Overview page (HTML).	Optional	Application Developer Common Modules
	Set up branding information for the UI (HTML only) You can customize the background image and branding information on the Quoting/Sales Online home page.	Optional	System Administrator
	Set up Security. Set security-specific profile options, and create resources and groups.	Mandatory if using Security	System Administrator CRM Administrator

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Responsibility
	Set up sales team assignment, sales credit allocation, and projected commission. Set up territories and credit rules, and create a ruleset of type <i>Projected Classification</i> .	Optional	CRM Administrator Incentive Compensation Super User
	Set up print quote. <u>Using Oracle Reports</u> To have personalized print quote reports, customize the report in Oracle Reports Developer. <u>Using XML Publisher</u> To have personalized print quote reports, customize the XSL stylesheet using XML Publisher. This is mandatory if you want to print contract terms.	Optional	System Administrator (For Oracle Reports) XML Publisher Administrator (for XDO)
	Set up Manual Pricing Request options.	Optional	System Administrators
	Enable interMedia Search	Optional	iStore Concurrent Programs System Administrator
	Set up Account Creation requirements	Optional	System Administrator
	Set up Proposals. Enable the Proposals link in the Overview sidebar.	Optional	Application Developer
	Set up Web Publishing functionality. Set specific profiles and set up specialty stores in iStore.	Mandatory to publish quotes	System Administrator iStore Administrator
	Set up Approvals. To enable approvals, set specific profile options and conditions and rules.	Mandatory for approvals	System Administrator AME (Approvals Management Engine) Administrator

Table 3–1 Oracle Quoting Process

Step	Description	Mandatory	Responsibility
	Set up Sales Contracts. To enable sales contracts, set specific profile options and set up clauses and contract templates in the Contract Terms library.	Mandatory to include sales contracts with quotes	System Administrator Contracts Administrator
	Set up Credit Check functionality To enable credit check, set specific profile option.	Optional	Order Management Super User (for credit check rules) System Administrator
	Set up Sales Supplement functionality. Use this functionality if you require supplemental information on quotes that will not pass into Oracle Order Management. Enable sales supplement functionality in Oracle Forms and view it in the HTML UI.	Optional	Quoting Sales Manager
	Create additional attachments document categories. Oracle Quoting supports one document category. You can create additional document categories as needed.	Optional	Application Developer
	Define descriptive flexfields. Customizable, undefined fields on the Oracle Quoting form that the application developer can define as needed.	Optional	Application Developer

Implementation Tasks for Oracle Quoting

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

- [Section 4.1, "Setting Up Quote Status and Quote Status Transitions"](#)
- [Section 4.2, "Setting System Profile Options"](#)
- [Section 4.3, "Enabling the Cache for Oracle Quoting \(HTML\)"](#)
- [Section 4.4, "Assigning a Seeded Oracle Quoting Responsibility to a User"](#)
- [Section 4.5, "Modifying Seeded Lookup Types"](#)
- [Section 4.6, "Setting up the Default Expiration Date"](#)
- [Section 4.7, "Setting up Overrideable Modifiers"](#)
- [Section 4.8, "Multi-Currency Price Lists"](#)
- [Section 4.9, "Promotional Goods"](#)
- [Section 4.10, "Displaying Sidebar Menu Options \(HTML\)"](#)
- [Section 4.11, "Customizing the Lines Pages \(HTML\)"](#)
- [Section 4.12, "Disabling Action Menus and Buttons \(HTML\)"](#)
- [Section 4.13, "Customizing the Overview Page \(HTML\)"](#)
- [Section 4.14, "Setting Up Branding \(HTML UI\)"](#)
- [Section 4.15, "Setting up Security"](#)
- [Section 4.16, "Setting Up Sales Team Assignment and Sales Credit Allocation"](#)
- [Section 4.17, "Automatic Sales Credit Allocation — External Engine"](#)
- [Section 4.18, "Setting Up the Print Quote Functionality"](#)
- [Section 4.19, "Setting up Manual Pricing and Tax Calculation Request Options"](#)

- [Section 4.20, "Enabling interMedia Search"](#)
- [Section 4.21, "Setting Up Account Creation Requirements for Quotes"](#)
- [Section 4.22, "Setting up Proposals Integration"](#)
- [Section 4.23, "Setting up Web Publishing Functionality"](#)
- [Section 4.24, "Setting up Approvals"](#)
- [Section 4.25, "Setting up Sales Contracts"](#)
- [Section 4.26, "Setting Up Credit Check Functionality"](#)
- [Section 4.27, "Implementing User Hooks"](#)
- [Section 4.28, "Setting up Sales Supplement Templates"](#)
- [Section 4.29, "Creating Additional Attachments Document Categories"](#)
- [Section 4.30, "Defining Descriptive Flexfield Information"](#)
- [Section 4.31, "Notes from Opportunities"](#)
- [Section 4.32, "Verify the Implementation"](#)

4.1 Setting Up Quote Status and Quote Status Transitions

Use this procedure to perform the following tasks:

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

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

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

- Modify tasks and notes
- Change the quote status, as long as the transition is valid

- Publish or unpublish a quote, if publishing is enabled and the quote satisfies publishing criteria
- Modify payment information, prior to submission of order
- Add attachments; you cannot remove, or replace existing attachments

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

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

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

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

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

The following table lists the seeded quote statuses.

Table 4–1 Seeded Quote Statuses

Quote Status	Description	Read-only
Approval Canceled	Sales representative canceled the approval process.	No
Approval Pending	Quote is pending approval, and is read-only.	Yes
Approval Rejected	Approval was rejected by the approvers.	No
Approved	Approved by the necessary approvers.	Yes
Draft	Initial status of quote.	No
Inactive	No more activity allowed on the quote.	Yes
Order Submitted	Quote has been submitted as an order to Oracle Order Management.	Yes

Table 4–1 Seeded Quote Statuses

Quote Status	Description	Read-only
Store Draft	For iStore internal use only. Allows iStore to have a Draft to Order flow that is separate from Quoting.	No

Users can update quotes with read-only status if the profile option ASO: Status Override is set to *Yes* at the appropriate level.

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

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

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

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

4.1.0.1 Rules for Quote Status Changes

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

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

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

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

Table 4–2 Seeded Quote Status Transitions

From	To	User Maintainable
Approval Pending	Approved	No
Approval Pending	Approval Canceled	No
Approval Pending	Approval Rejected	No
Store Draft	Draft	No
Store Draft	Inactive	No
Store Draft	Order Submitted	No

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

Each transition has a Transitioned By field that is read only. This field shows one of two values:

- User — 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.
- Application — Displays APPLICATION if a transition can only be triggered by an event occurring in the application, for example, placing an order.

You cannot create new transitions to the following statuses:

- Approval Canceled
- Approval Rejected
- Approved
- Store Draft

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

- Approval Pending
- Order Submitted
- Store Draft

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Navigation

Oracle Quoting > Setup > Quote Status> Quote Status Setup window

Steps

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

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

- e. **Forms Only:** To create a new version when the user selects the save icon for a quote in the main Quoting form, check the **Auto Versioning** box for the new status.
 - f. Select **Save** on the toolbar.
3. To set up the rules that determine permitted status transitions for a particular status:
 - a. In the Quote Statuses region, select the status to set up.
 - b. In the Allowed Transition to Status region, use the Code LOV to select an allowable transition status. You can allow transitions to multiple statuses.
 - c. Repeat the previous step for each permitted transition status.
 - d. Select **Save** on the toolbar.

4.2 Setting System Profile Options

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

Login

Log in to Oracle Forms

Responsibility

System Administrator

Navigation

Profile > System > Find System Profile Values window

Steps

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

Notes

The "Return Item" button within the iStore application can be enabled or disabled in Oracle Quoting by setting the profile option, *IBE: Use Returns*. Set the profile option to "No" for applications "Oracle Quoting" and "Oracle Field Sales" in order to disable the "Return Item" button.

4.3 Enabling the Cache for Oracle Quoting (HTML)

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

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

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

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

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

4.4 Assigning a Seeded Oracle Quoting Responsibility to a User

The following Oracle Quoting seeded responsibilities are available:

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

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

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

Prerequisites

The user must be set up as an application user.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Security > User > Define

Steps

1. Query for the user.
2. In the Responsibilities tab, select **Oracle HTML Quoting Sales Agent** from the Responsibility LOV.
3. Save your changes.
4. After assigning the responsibility to the user, you must ensure that the profile **JTF_PROFILE_DEFAULT_RESPONSIBILITY** is set to 23410.
5. Ensure that the profile option **JTF_PROFILE_DEFAULT_APPLICATION** is set to 880.

4.5 Modifying Seeded Lookup Types

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

To modify the seeded Lookup Types (QuickCodes):

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Navigation

Quoting > Setup > Quick Codes

4.6 Setting up the Default Expiration Date

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

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

Expiration Date Based on Calendar Period

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

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

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

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

Expiration Date Based on a Fixed Number of Days

Alternatively, you can set the default quote expiration date so that quotes expire after a fixed number of days. The fixed number of days defaults from the profile

option **ASO: Quote Duration**. For more information, see [Appendix A, "Oracle Quoting Profile Options"](#).

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

4.7 Setting up Overrideable Modifiers

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

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

Manual Modifiers in Buckets

In Forms, users can select manual adjustments from the Price Adjustment form. Bucket numbers will be displayed on this form as well, so that sales representatives can see the buckets before applying manual modifiers.

In the HTML UI, manual adjustments are entered in the Line Discount field or Unit Adjustment Percent field, when the user overwrites the Selling Price or Total Adjustment %.

When a sales representative overwrites the selling price (in either UI), the Pricing engine returns a manual adjustment in the null bucket. If a manual modifier in the null bucket has not been defined, the pricing engine will raise an error. If you want to ensure that the selling price is calculated to be the same price that the user has entered, you must set up the four manual modifiers in the null bucket.

4.8 Multi-Currency Price Lists

Multi-currency price lists simplify pricing setup if you are selling products to customers in multiple countries. Multi-currency price lists make it easier to quote to customers in multiple regions of the world at the same time.

In order to use multi-currency price lists, there must be a conversion list associated with each price list. The conversion list, set up in Advanced Pricing, contains an

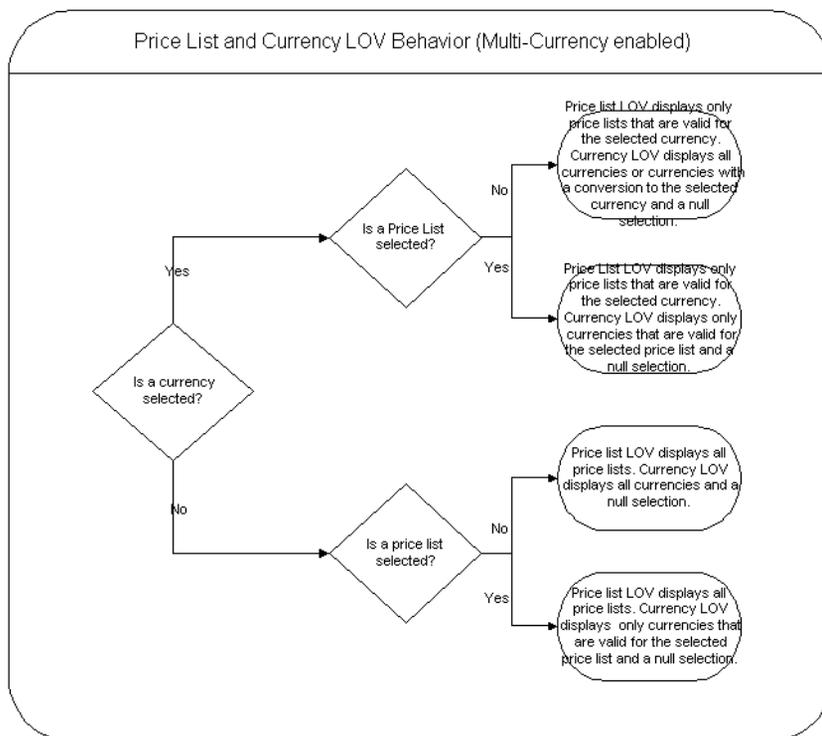
algorithm that converts the base currency price from the price list into one or more additional currencies.

The use of multi-currency price lists is controlled by the profile option **QP: Multi-Currency Installed**. If this profile is set to Yes and the profile **QP: Multi-Currency Usages** is set to Yes at the Application or Responsibility level, Quoting shows all price lists with the selected currency as base currency, as well as all price lists where there is a conversion list for the selected currency. If the profile option is set to No, the Price List LOV displays only price lists that are valid for the selected currency. You can leave the Currency field blank to view all price lists, or leave the Price List field blank to view all currencies. See [Appendix A.6, "Oracle Pricing Profile Options"](#) or the *Oracle Advanced Pricing Implementation Manual Release 11i* for more information.

You must also run the concurrent program *Update Price Lists with Multi-Currency Conversion Criteria* to enable multi-currency price lists. You must only run this program only once or data corruption will occur. Once the concurrent program has been run successfully, all existing price list or agreement windows will be converted to multi-currency price lists. You should not return try to disable multi-currency price list functionality. Changing the profile back to No may cause undesired results if conversion criteria have been used. Oracle does not support changing the setting back to No. For more information please refer to the *Oracle Advanced Pricing User Guide*.

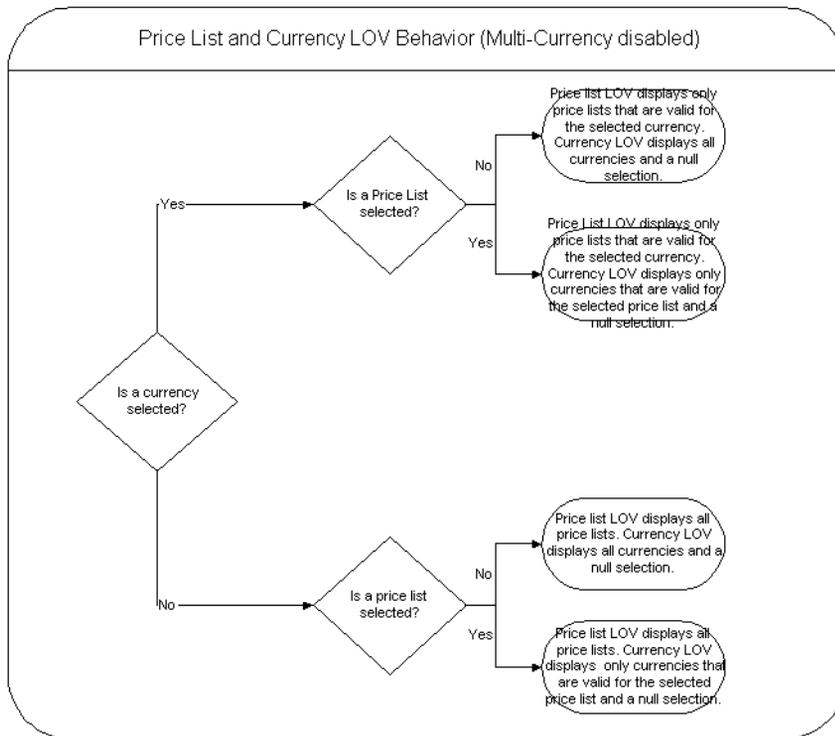
With multi-currency price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

If multi-currency is turned on, the LOV behavior is as follows:



Additionally, if ASO: Price List Override is set to *No*, and there is no currency selected, the Price List LOV is read only and the Currency LOV displays only currencies that are valid for the selected price list. In the HTML UI, if there is only one currency, the Currency field is read only. If ASO: Price List Override is set to *No*, and a currency is selected, the Price List LOV is read only and the Currency LOV displays only currencies that are valid for the selected price list.

If multi-currency is turned off, the LOV behavior is as follows:



Additionally, if ASO: Price List Override is set to *No*, the Price List and Currency LOVs are read only in the HTML user interface.

4.8.1 Setting Up a Multi-Currency Price List

You must set up a price list with a conversion list, in order to use multi-currency price lists. Price lists and multi-currency conversion lists are set up in Oracle Advanced Pricing. Please see the *Oracle Advanced Pricing User's Guide* for information on setting up price lists and conversion lists.

Note: The *Transaction* conversion type is not supported. This means the Quoting user cannot explicitly select a General Ledger-sourced Conversion Type or specify a Conversion Rate or Conversion Date.

4.9 Promotional Goods

You can set up a modifier in Advanced Pricing that automatically adds a product to a quote if the qualifying conditions (the purchase of one or more product) are met. The product or promotional good, is added to the quote as a free or discounted item.

The following set up restrictions apply to promotional goods:

- A promotional good cannot be a service
- A promotional good cannot have a service attached to it.
- A promotional good cannot be a configuration component.
- A promotional good cannot be restricted based on setting up promotional limits.
- The qualifying product for a promotional good cannot be a service and have a service reference to the promotional good.
- If using promotional goods, the profile option IBE: Calculate Price should be set to *No*. Otherwise, re-pricing could cause un-intended consequences.
- Line level modifiers will be applied to the promotional good line only if defined in a pricing phase with the Freeze Override flag enabled.
- Promotional good modifier discounts cannot be applied to model subcomponents.
- Pricing attributes cannot be used to derive the list price of a Free good.
- In the Get Product List for a promotional good modifier line, the price list's currency must match the modifier currency.
- Items set up as promotional goods should be eligible for addition to the quote.

4.10 Displaying Sidebar Menu Options (HTML)

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

You may remove the following links related to optional functionality:

- Approvals: menu query is QOT_SALES_INFORMATION

- Sales Team: menu query is QOT_SALES_INFORMATION
- Contract Terms: menu query is QOT_SALES_INFORMATION
- Proposals: menu query is QOT_SALES_INFORMATION
- Sales Supplement: menu query is QOT_OTHER_INFORMATION
- Additional Information: menu query is QOT_INFORMATION

Prerequisites

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

Login

Login to Oracle Forms

Responsibility

Applications Developer

Navigation

Applications > Menu

Steps

1. Navigate to **Applications > Menu**. The Menus form displays.
2. Query for the menu to change.
 - **QOT_SALES_INFORMATION** — Sales Information menu details and disable Approvals, Sales Team and/or Sales Contracts.
 - **QOT_OTHER_INFORMATION** — Other Information menu and disable Sales Supplement.
 - **QOT_INFORMATION** — Quote Information menu and disable the Additional Information link.
3. To disable a line, the Edit menu, select **Delete** or place the cursor in the Prompt field and clear it by selecting **Edit > Clear > Field**.
4. Select the save icon. A confirmation message displays with your request identification. Note down this number so that you can track the relevant concurrent program. When the program has completed, bounce the Apache server. At your next login, the changes will be visible.

4.11 Customizing the Lines Pages (HTML)

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

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

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

Customizations are made on the Regions Items window of the Define Regions page. The Region Id used for Lines page customization is QUOTELINEDetails.

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

Table 4-3 Column/Attribute Mapping

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

Table 4–3 Column/Attribute Mapping

Column Name (Label)	Attribute Name
Instance Name	QOT_INSTANCE_NAME
Custom Columns	QOT_CUSTOM_COL1, QOT_CUSTOM_COL2, QOT_CUSTOM_COL3
Tax Details	QOT_TAX_DETAILS
Additional Information	QOT_ADDL_INFO

4.11.1 Seeded Columns

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

The following mandatory columns are always displayed:

- Select
- Product
- Description
- UOM
- Quantity

The following seeded columns are optional:

- Unit List Price
- Unit Adjustment Percent
- Line Discount

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

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

- Line Type
- Line Number
- Instance Name
- Link to Customer Page
- Tax Details
- Additional Information

4.11.2 Customizing the Lines Page

To customize the Lines page:

Prerequisites

You must use the Region ID QUOTELINEDETAILS.

Login

Log in to Oracle Forms.

Responsibility

Applications Developer Common Modules

Navigation

Define Regions > Region Items

Notes

- Deselecting the Node Display checkbox hides a column. Selecting this checkbox displays the column.

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

- Entering a new value in the Long Label field changes a column label.
- Changing the values in the Sequence fields rearranges columns. The lowest sequence number is the first column displayed on the Lines page.

- Bounce web server. When you next login, the changes are visible.

4.11.3 Enable/Disable Line Level Actions or Table Level Buttons

You can choose to enable or disable line level actions and table level buttons. This allows you to control the actions that a user can perform on the Lines page. See [Section 4.12, "Disabling Action Menus and Buttons \(HTML\)"](#) for more information.

4.11.4 Customizing the Details Columns

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

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

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

Oracle quoting passes in two parameters for these columns:

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

4.12 Disabling Action Menus and Buttons (HTML)

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

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

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

Table 4–4 Lookup Types for Action Menus and Buttons

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

To enable or disable actions or buttons:

Prerequisites

The lookup code must be extensible.

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Navigation

Quoting > Setup > Quick Codes

Notes

- Lookup types encompass multiple lookup codes.
- Selecting the Enabled checkbox for a lookup code related to one of the lookup types listed above ensures that the action or button appears in the HTML UI.
- For lookup code/type changes to take effect, you must bounce the web server. When you next log in, the changes are visible.

4.13 Customizing the Overview Page (HTML)

By default, the Overview Page displays six sections:

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

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

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

Table 4–5 Section/Attribute Mapping

Section Name	Attribute Name
Lines	QOT_LINES
Grand Total	QOT_GRAND_TOTAL
Addresses	QOT_ADDRESS
Shipping	QOT_SHIPPING
Payment	QOT_PAYMENT
Additional Information	QOT_HDRFLEX

To hide a section:

Login

Login to Oracle Forms.

Responsibility

Applications Developer Common Modules

Navigation

Define Regions > Region Items

Notes

- The Region ID for these region items is QUOTEOVERVIEWSECTIONS.
- Deselecting the Node Display checkbox hides a section. Selecting this checkbox displays the section.
- You must bounce the web server for the changes to take effect. When you next login, the changes are visible.

4.14 Setting Up Branding (HTML UI)

You can customize the branding information on the Quoting (standalone) or Sales Online (integrated) pages. You can edit the following information:

- Change the background image
- Change the branding information

4.14.1 Changing the Background Image

To change the background image:

Login

Oracle Forms

Responsibility

System Administrator

Navigation

Profile > System

Steps

1. Create a custom style sheet as copy of the seeded style sheet *jtfucss.css*. This file is located in the \$OA_HTML directory.

Please refer to *CRM System Administrator's Guide* for more information on implementing customer style sheets and setting branding size.

2. Create a new background image to replace the existing background image. Replace the existing background image for the tag **applicationBody** with the new image in the customer style sheet created in the previous step.

3. Log in to Oracle Forms as System Administrator.
4. Select Profile > System.
5. In the Find System Profile Values form, enter the following information:
6. Application: Oracle Quoting
7. Profile: JTF_PROFILE_DEFAULT_CSS
8. Click **Find**.
9. In the Site column, select the style sheet you created in the previous step.
10. Save your work.
11. Bounce Apache and Jserv.

4.14.2 Setting Up Branding

To set up branding for the HTML UI:

Login

JTF

Responsibility

Sysadmin

Navigation

Settings > System > Branding

Steps

1. At the JTF login page, log in as sysadmin.
2. Select the Settings tab.
3. Select the System sub-tab.
4. Select Branding from the sidebar menu.
5. Select an application from the Application drop-down menu. Enter Branding name as needed for application and or responsibility.

4.15 Setting up Security

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

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

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

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

4.15.1 Setting up Security Profile Options

For information on how to set profile options, see [Section 4.2, "Setting System Profile Options"](#). For a complete list of the security profile options, see [Appendix A.2, "Current Profile Options"](#).

4.15.2 Creating a Resource

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

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

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

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

4.15.3 Setting Up Manager Roles

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

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

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

Table 4-6 Role Type Example

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

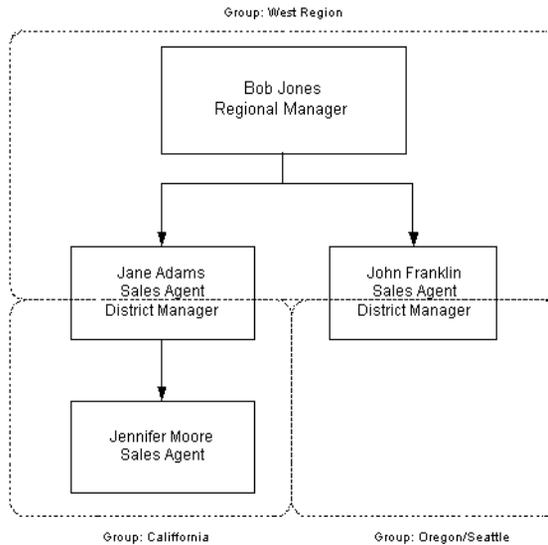
For complete instructions on setting up roles, refer to the *Oracle CRM Application Foundation Concepts and Procedures*.

4.15.4 Setting up a Group

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

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

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

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

Login to Oracle Forms.

Responsibility

Resource Manager

Navigation

Resources Manager > Maintain Resources > Groups

Steps

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

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

4.15.5 Verify Group Setup

To verify that you have set up your groups correctly:

Login

Login to Oracle Forms.

Responsibility

Resource Manager

Navigation

Resource Manager > Maintain Resources > Group Hierarchy

4.16 Setting Up Sales Team Assignment and Sales Credit Allocation

Oracle Quoting integrates with Oracle Territory Manager to allow you to enable automatic sales team assignment for quotes. Sales teams are assigned based on:

- Customer
- Geography
- Product

If integrated with Oracle Incentive Compensation (or an external engine) as well, you can call the OIC engine to determine sales credit allocations on quotes.

Note: If you plan to use the sales team assignment and sales credit allocation/projected commission functionalities, you must set the profile option **ASO: Security Enable From API** to **Yes**.

For information on setting up sales team assignment functionality, refer to [Chapter 9, "Integrating Oracle Quoting With Oracle Territory Manager"](#).

For information on setting up sales credit allocation functionality using Oracle Incentive Compensation, refer to [Chapter 8, "Integrating Oracle Quoting With Oracle Incentive Compensation"](#).

If you implemented automatic sales team assignment and automatic sales credit allocation, you can also set up Quoting and Incentive Compensation to calculate projected commission for quotes. Refer to [Chapter 8, "Integrating Oracle Quoting With Oracle Incentive Compensation"](#) for more information.

4.17 Automatic Sales Credit Allocation — External Engine

If you choose not to use Oracle Incentive Compensation's Sales Credit Allocation engine, you can implement sales credit allocation functionality using an external engine. Quoting provides a customizable hook that updates a quote's sales credits through a call to the external engine.

For information on implementing user hooks, see [Section 4.27, "Implementing User Hooks"](#).

For information on sales credit allocation using Oracle Incentive Compensation, see [Chapter 8, "Integrating Oracle Quoting With Oracle Incentive Compensation"](#).

4.18 Setting Up the Print Quote Functionality

Oracle Quoting offers two distinct methods for printing quotes. You can print quotes using:

- Oracle Reports Server
- Oracle XML Publisher, XDO

By default, Oracle Quoting uses Oracle Reports Server for Print Quote functionality.

Note: The XML Publisher printing solution is required if you are enabling Sales Contracts integration.

With Oracle Reports Server, you can print quotes in either Adobe PDF or Microsoft RTF, while XML Publisher allows you to print quotes only in Adobe PDF format.

For more information on Print Quote profile options, refer to [Section A.2.14, "Oracle Quoting Profile Options for Print Quote"](#).

4.18.1 Setting Up Print Quote for Oracle Reports Server

Oracle Reports Server is the default printing method for Oracle Quoting.

Quoting provides an out-of-the-box template/stylesheets that prints quote details, an ordered list of sections and subsection and their associated clauses.

4.18.1.1 Oracle Reports Server Setup

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

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

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

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

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

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

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

4.18.1.2 Customizing the Print Quote Report

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

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

Login

Log in to Oracle Applications.

Responsibility

Quoting Sales Manager

Navigation

Quoting > Setup > Documents

Notes

- Use the Category **PrintQuote**.

Steps

1. Select **File** from the Source Data Type LOV and browse for your file. Save the document to the database.
2. Find the Document ID for the document
 - a. Select **Diagnostics > Examine** from the Help menu.
 - b. In the Examine Field and Variable Value form, enter **DOCUMENT_HEADER** for the Block and **DOCUMENT_ID** for the Field.
 - c. Note the value returned in the Value field.

Use this value to set the profile option **ASO: Company Logo** at the appropriate level to display the company logo on your print quote report.

3. Customize the report title.
 - a. Two customizable FND messages are registered for the print quote report, one for non-executable quotes and one for executable quotes. The message names are:
 - * **ASO_PQUOTE_EXEC_TITLE**
 - * **ASO_PQUOTE_NONEXEC_TITLE**
4. Customize the disclaimer.
 - a. If a quote is non-executable, you can customize the disclaimer printed on the bottom of the quote by changing the name of the **ASO_PQUOTE_DISCLAIMER** message.

Note: The disclaimer text should no more than 4 lines long. If more than 4 lines, the disclaimer will be truncated.

4.18.1.3 Adding or Disabling the Report Templates

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

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

To disable report templates:

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Navigation

Quoting > Setup > Quick Codes

Notes

- The lookup type for Print Quote templates is **ASO_PQUOTE_TEMPLATES**. The seeded report template (Lookup code) is **ASOPQTEL**.
- New print quote templates must be located in the directory specified in the profile option **ASO: Print Quote Reports Directory**.
- Deselect the Enabled checkbox removes the report from the list of available Print Quote reports. Selecting the checkbox enables the report.
- The Code for a new template must match the filename for the RDF file (without the.rdf extension).
- You must bounce the web server for the change to take effect. When you next log in, the change is visible.

4.18.2 Setting Up Print Quote for XML Publisher (XDO)

The layout of the printout will be dictated by a customizable XSL-FO stylesheet, specified in the profile option **ASO: Default Layout Template**. All quotes printed using XML Publisher are in PDF format. **ASO: Default Layout Template** also provides the *Preview Terms* format.

Note: On the default stylesheet template, no table variables will be rendered. However, the template will include a section providing details as to how to render table variables.

4.18.2.1 Set up Steps for Oracle XML Publisher

The following steps are necessary for the XDO version of Print Quote to function properly. To set up XDO print quote:

1. Set the profile option ASO: Print Quote Method to *XML Publisher*
2. Upload the XSL stylesheet using the XML Publisher Administrator responsibility. Refer to [Section 4.18.2.2, "Customizing the XML Publisher Report"](#) for more information.
3. Set the profile option ASO: Default Layout Template to the value corresponding to a valid XSL spreadsheet that you uploaded

4.18.2.2 Customizing the XML Publisher Report

Customizing the XML Publisher report involves changing the XSL stylesheet to meet your requirements. To customize the XSL stylesheet:

1. Customize the report title.
 - a. Two customizable FND messages are registered for the print quote report, one for non-executable quotes and one for executable quotes. The message names are:
 - * ASO_PQUOTE_EXEC_TITLE
 - * ASO_PQUOTE_NONEXEC_TITLE
2. Customize the disclaimer.
 - a. If a quote is non-executable, you can customize the disclaimer printed on the bottom of the quote by changing the name of the ASO_PQUOTE_DISCLAIMER message.

Note: The disclaimer text should no more than 4 lines long. If more than 4 lines, the disclaimer will be truncated.

3. Enable printing of the company logo.

The out-of-box stylesheet has the following lines commented out:

```
<!-- Uncomment this is for company logo:
  <xsl:variable name="report.logo"
  select="//Controller/ReportLogo"/>
  -->
```

```
<!-- Uncomment this is for company logo fo:external-graphic  
height="0.5cm" width="2.0cm" src="{ $report.logo }"/-->
```

- a. Make sure that your logo (gif image file) is available on the middle tier.
- b. Set the profile ASO: Company Report Logo to the absolute path of the logo image file. For example: /u02/images/mylogo.gif
- c. Uncomment the aforementioned lines.

4.18.2.3 Enable Printing of Table Variables

If you are integrating with Oracle Sales Contracts and have defined table variables, you can enable printing of the variables. The default template contains code for printing the variables, but they are commented out.

To enable printing of the table variables, uncomment the code between these two comment lines:

```
<!-- table variables -->  
<!-- end of table variables substitution -->
```

4.18.2.4 Adding or Disabling Templates

To add or disable templates:

Login

Log in to Oracle Forms.

Responsibility

XML Publisher Administrator

Navigation

XML Publisher > Layout Templates

1. To add a new template, click **Create Template**.
 - a. Enter a name and code for the template.
 - b. Select the application *Order Capture* and the template type *XSL-FO*.
 - c. Enter a start date.
 - d. Select the XSL file to add and the corresponding language.
 - e. The file should already be present in your local file system.
 - f. Select **Apply**.

2. To disable a template, enter an end date.

4.18.3 Product Categories

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

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

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

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

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

4.19 Setting up Manual Pricing and Tax Calculation Request Options

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

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

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

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

Table 4-7 Pricing Option Scenarios

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

4.19.1 Enabling Manual Pricing and Tax Requests

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

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

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

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

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

4.20 Enabling interMedia Search

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

Oracle iStore has introduced two new profile options that will affect the behavior of Quoting searches with interMedia enabled.

- **IBE: Category Set Filter for Product Search**

Currently, when you execute a search, Quoting derives the category set for the search from either the profile option **ASO: Category Set** or from the category set mapped to the OM functional area in Inventory. If you are enabling interMedia search and you run the iStore concurrent program, iStore Search Insert, the table `ibe_ct_imedia_srch`, is populated with all category sets available in Inventory (all items). Depending on the amount of records, this could be a potentially harrowing process. Therefore, iStore has introduced the profile **IBE: Category Set Filter for Product Search**. It is recommended, for performance benefits, that you select the same category set for this profile and the profile **ASO: Category Set** (at the Site level), thereby limiting the number of records that populate the table to only those in the specified category set.

- **IBE: Web Status Filter for Product Search**

In Inventory, there is a Web Status flag that indicates if an item is web enabled, and if it can be web published. Unlike iStore, Quoting does not require that all items have the statuses **Published** or **Unpublished**. The new profile **IBE: Web Status Filter for Product Search** allows you to specify if items with specific web statuses are populated in the iStore search table. This profile defaults to

Published, and if null, is treated as Published. Therefore, if you want Quoting searches to continue with existing behavior, you must set the profile option ASO: Web Status Filter for Product Search to ALL at the Site level.

For more information about the iStore profile options, see the Oracle iStore Release Notes, Part # B12241-01.

Please note that the following characters are treated as literal characters when performing an interMedia search:

- \
- ,
- &
- (
-)
- ?
- }
-]
- {
- [
- -
- ~
- |
- \$
- !
- >

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

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

To enable Intermedia search:

1. Set the following profile option:
 - **ASO: Enable Intermedia Search**
See [Appendix A, "Oracle Quoting Profile Options"](#) for more information.
2. Run the Concurrent Program iStore Search Insert

4.20.1 Running iStore Search Insert

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

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

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

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

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

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

To run the iStore Search Insert program:

Login

Log in to Oracle Forms.

Responsibility

iStore Concurrent Programs Responsibility

Navigation

iStore Concurrent Programs > Concurrent Request window

Steps

1. Select **Single Request** and select **Ok**.
2. Select **iStore Search Insert** concurrent program and submit. Note the request ID.
3. You can view the progress of the request by selecting **View Requests** and searching by Request ID.

4.20.2 Refreshing the Search Index

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

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

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

```
exec ctx_ddl.sync_index('APPS.IBE_CT_IMEDIA_SEARCH_IM')
```

The changes appear in the product catalog.

4.21 Setting Up Account Creation Requirements for Quotes

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

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

Account creation is based on the following profile options:

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

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

- **Always create accounts**—Accounts are created for customers when the quote is saved.
- **Create accounts as necessary**—Accounts are created only when a quote is web published or when a quote is converted into an order.
- **Create accounts only when Place Order**—Accounts are created only when the quote is converted into an order.

Scenarios

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

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

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

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

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

- Web published
- The quote is converted into an order.

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

4.22 Setting up Proposals Integration

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

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

- Menu Name: QOT_SALES_INFORMATION
- Prompt: Proposals

For instructions on enabling a link in the sidebar menu, see [Section 4.10, "Displaying Sidebar Menu Options \(HTML\)"](#).

4.23 Setting up Web Publishing Functionality

Web publishing functionality allows sales representatives to publish quotes to customers through Oracle iStore specialty stores. For information on setting up Web Publishing functionality, refer to [Chapter 5, "Setting Up Web Publishing"](#) for more information.

4.24 Setting up Approvals

For information on setting up Approvals functionality, refer to [Chapter 6, "Integrating Oracle Quoting With Oracle Approvals Management"](#).

4.25 Setting up Sales Contracts

For information on setting up sales contracts functionality, refer to [Chapter 7, "Integrating Oracle Quoting With Oracle Sales Contracts"](#).

4.26 Setting Up Credit Check Functionality

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

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

- Header level bill-to customer, bill-to account, and bill-to address
- Credit Check Rule
- Quote Total
- Quote Currency

The credit check API consists of two sections:

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

4.26.1 Internal Credit Check

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

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

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

To perform internal credit checks, you must:

- Ensure that the customer is enabled for credit checks.

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

- Set credit limits.

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

- Define credit check rules in Oracle Order Management.

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

4.26.1.1 Defining Credit Check Rules

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

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

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

Login

Log in to Oracle Forms.

Responsibility

Order Management Super User

Navigation

Order Management > Define > Credit > Define Credit Check Rules

Steps

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

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

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

4.26.2 External Credit Check

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

For information on implementing user hooks, see [Section 4.27, "Implementing User Hooks"](#).

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

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

Populate Script

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

- Customer Pre Hook
- Customer Post Hook

Enabling Script

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

Parameters

This script accepts the following parameters:

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

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

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

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

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

4.27 Implementing User Hooks

To implement user hooks, you must:

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

4.27.0.1 Populating the JTF_USER_HOOKS table

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

4.27.0.2 Enabling User Hooks

To enable user hooks:

1. Run the Enabling script against the database. This script enables one user hook at a time. It is only necessary to run this script to enable the desired hook.

2. Enter each parameter. For enabling user hooks with the ENABLE parameter, the value should be **Y**.
3. You must implement the **hook package** when the corresponding hook is enabled.

4.27.0.3 Disabling User Hooks

To disable user hooks:

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

4.28 Setting up Sales Supplement Templates

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

Once setup is complete in the Forms UI, Sales Supplement information is accessible to sales representatives in the HTML and Forms UIs. Sales Supplement functionality is enabled using the profile option **ASO: Enable Sales Supplement**. For more information on this and other profile options, see [Appendix A, "Oracle Quoting Profile Options"](#).

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

Sales Supplement templates can be associated with a specific application, allowing users to query for templates based on application.

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

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

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

Available component types are:

- Note
- Header
- Footer
- Question

There are five types of responses:

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

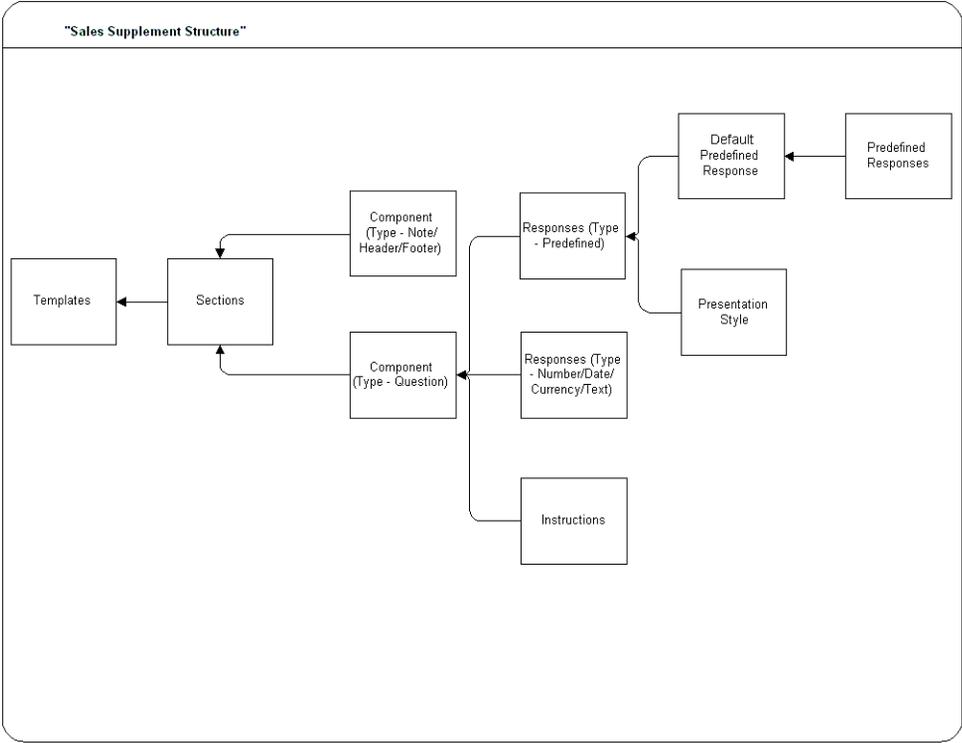
The response type Predefined Responses is associated with Presentation Styles. There are four Presentation Styles:

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

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

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

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



Prerequisites

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

Login

Log in to Oracle Forms.

Responsibility

Quoting Sales Manager

Navigation

Quoting > Setup > Sales Supplement

Notes

- Sales Supplement templates are created in reverse order, beginning with the responses and ending with the template. You must manually query each tab, as the tabs are not automatically queried. Each tab behaves as a standalone tab and therefore, you must save your work in each tab.
- Templates can be applied at the header, line, or header and line levels. The default value is Quote Header and Line. You can designate default templates for header and line level based on the profile options ASO: Default Header Level Sales Supplement Template and ASO: Default Line Level Sales Supplement Template. See [Appendix A.2.17, "Quoting Profile Options for Sales Supplement"](#) for more information.

Field Behavior

- Components tab

The Response Type field is enabled only if the Type is Question. The following response types are available: Text, Number, Date, Currency, and Predefined Responses. The Responses are enabled only if the Component Type is Question and Response Type is Predefined.

- Sections tab

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

- Template tab

The Application pop list values are based on the FND lookup ASO_SUP_TEMPLATE_CONTEXT. See [Appendix E, "Seeded Lookup Types"](#) for more information.

4.29 Creating Additional Attachments Document Categories

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

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

4.30 Defining Descriptive Flexfield Information

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

Note: There are a maximum of 15 flexfields at the quote header level and 15 flexfields at the quote line level.

In the Forms UI, descriptive flexfields are located in the main Quoting form, and in the Pricing view of the Quote Lines tab. They are represented by an unnamed field enclosed in brackets.

In the HTML UI, header level flexfields are located in the Create Quote, Create Quote from Opportunity, General, Additional Information, and Overview (read-only) pages. Line level flexfields are accessed through the Lines page Action menu item **Specify Additional Information** or by clicking the link in the Additional Information column.

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

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

4.30.1 Specifying Flexfields

To specify values for flexfields:

Login

Log in to Oracle Forms

Responsibility

Application Developer

Navigation

Flexfield > Descriptive > Segments

Steps

1. From the navigator, select **Flexfield > Descriptive > Segments**.
2. For header flexfields, query for the application *Oracle Order Capture*, with the Title *Header%*.

For line flexfields, query for the application *Oracle Order Capture*, with the Title *Lines%*.
3. Enter flexfield information as described in the *Oracle Application Developer's Guide*.
4. Set up flexfield segments and map the segments to attributes.
5. Save your work and query for Oracle Order Management with the Topic *Additional Header Information*.
6. Set up the flexfield(s) exactly for Order Management as you did for Oracle Quoting.

When you log in to Quoting, you should see the flexfield segments you defined. Additionally, when you place an order, the flexfield information will be available on the order.

4.31 Notes from Opportunities

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

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

- Note type is available to all possible sources—The note type was not mapped to a particular object.

- Note type is available to the seeded source object **Quoting**—The CRM Administrator mapped the note type to the Quoting source object (ASO_QUOTE).

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

4.31.1 Tasks From Opportunities (HTML only)

When sales representatives create tasks, they must specify task types. Task types are used to categorize tasks. Oracle CRM Technology Foundation's tasks functionality allows administrators to create task types as necessary.

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

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

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

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

4.32 Verify the Implementation

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

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

1. Create a complex quote.
 - Create a new customer for your quote.

- Add and configure a model item.
 - Before submitting the quote as an order, create a new contact for the customer.
 - Before submitting a quote as an order, create a shipping or billing address for the customer.
2. Submit the order.

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

Setting Up Web Publishing

This section contains information on setting up the web publishing functionality in Quoting and Oracle iStore.

- [Section 5.1, "Overview of Web Publishing"](#)
- [Section 5.2, "Enabling Web Publishing"](#)

5.1 Overview of Web Publishing

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

Validations

When a salesrep publishes a quote to iStore, an iStore API validates the published quote and returns exception messages to Quoting if the attempt to publish is not successful. This functionality requires the use of iStore IBE.P or higher. If this patch is not applied, the existing Publish behavior will continue.

The following validations will be performed when you attempt to publish to a minisite:

- Shipping Method on the minisite
- Payment Method on the minisite
- Payment Threshold on the minisite

If any of the validations fail, the quote will not be published.

5.2 Enabling Web Publishing

Use of web publishing functionality in Quoting is controlled by the profile option **ASO: Enable Web Publishing**. For more information on Quoting profile options for web publishing, see [Appendix A.2, "Current Profile Options"](#).

You must also set the profile **IBE: iStore Non Secure URL** to `istore URL` at the application level. See [Appendix A.10, "Oracle iStore Profile Options"](#).

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

5.2.1 Setting Up a Specialty Site

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

Note: Quoting supports Specialty Sites that have no access restrictions.

5.2.2 Customizing Publish Notifications

You can customize publish notifications based on Organization ID, Minisite ID, and User Type. This functionality requires the use of iStore IBE.P or higher. If you do not apply this patch, you can still use the iStore Merchant UI to configure Quoting notifications. Refer to the *Oracle iStore Implementation and Administration Guide* for more information.

The HTML user interface of Quoting provides notifications for the following events:

- FND user registration — ASOQOTPUBLISHREG
- Publish executable quote — ASOQOTPUBLISHHEXEC
- Publish non-executable quote — ASOQOTPUBLISHUNEXEC

To customize these notifications, you must:

1. Create a lookup for the merchant UI
2. Customize notification
3. Add a new message in the work template file

5.2.2.1 Create a lookup for the merchant UI

The FND lookup type IBE_WF_NOTIFICATION is used by the iStore Merchant UI to render each notification available for configuration, where the meaning of the lookup code in the merchant UI is available as a link.

Update the FND lookup type IBE_WF_NOTIFICATION with the following lookup codes:

- ASOQOTPUBLISHREG
- ASOQOTPUBLISHEXEC
- ASOQOTPUBLISHUNEXEC

The following table shows an example of how you could set up the lookup codes:

Table 5–1 Example Set Up of Lookup Codes for Lookup Type IBE_WF_NOTIFICATION

Lookup Code Name	Meaning	Description
ASOQOTPUBLISHREG	Quoting FND User Registration	Quoting FND User Registration
ASOQOTPUBLISHEXEC	Quoting Publish Executable Quote	Quoting Publish Executable Quote
ASOQOTPUBLISHUNEXEC	Quoting Publish Un-executable Quote	Quoting Publish Un-executable Quote

5.2.2.2 Customize the Notification

After entering the lookup codes, you must use the merchant UI to configure Quoting publish notifications.

Login

JTF Login Page

Responsibility

IBE_ADMIN

Navigation

Menu > Notifications

Steps

1. Select the notification to configure.
The notification Setup page displays the seeded notification setting.
2. To update the notification, click **Update**.
3. To add a new notification configuration, click **Add Configuration**.
 - a. Select the new configuration based on Org ID, Minisite ID, and User Type.
 - b. Select new notification messages from the Messages LOV.

5.2.2.3 Adding a new message in the work template file

iStore uses a workflow item type *iStore Alerts Workflow* as the placeholder for iStore notification templates.

Steps

1. Choose the item type *iStore Alerts Workflow*.
2. Select the notification to configure, and copy and paste it under the item type *iStore Alerts Workflow*.

When copying a new message, you must maintain the original name of the message as a prefix in the name of the new message.

3. Revise the message text as necessary and change the notification description. Save all changes.

The message is now available for configuration in the merchant UI.

Integrating Oracle Quoting With Oracle Approvals Management

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

[Section 6.1, "Setting Up Approvals Functionality"](#)

6.1 Setting Up Approvals Functionality

Note: It is recommended that you implement quote approvals if you enabled Sales Contracts integration.

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

1. Set up all Approvals quote statuses.

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

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

2. Set the Approvals profile options.

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

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

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

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

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

Integrating Oracle Quoting With Oracle Sales Contracts

This section contains information on setting up sales contracts functionality.

- [Section 7.1, "Overview of Quoting/Sales Contracts Integration"](#)
- [Section 7.2, "Enabling Sales Contracts Functionality"](#)

7.1 Overview of Quoting/Sales Contracts Integration

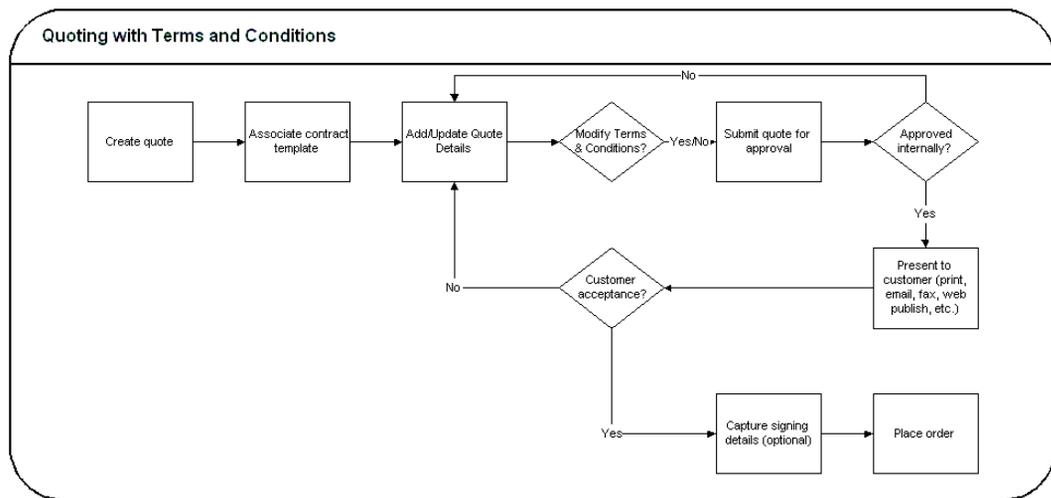
Note: It is strongly recommended that you implement Approvals if you plan to integrate with Oracle Sales Contracts and use the **Contract Terms** features to negotiate terms and conditions on the quote. Use of the approvals process prevents outdated or invalid contract terms from ending up on a legally binding contract, in the hands of the customer.

Oracle Quoting integrates with Oracle Sales Contracts to provides functionality to negotiate contract terms on a quote. The objective of Quoting/Sales Contracts integration is to automate the creation and delivery of quotes with standard or negotiated contract terms. Integration of Quoting and Sales Contracts allows users to:

- Create quotes with standard contract terms from a contract template

Note: Oracle Quoting supports only Contract templates created with the document type *Quote*. Refer to the *Contracts User Guide* for details on how to create and approve contract templates.

- Add or remove pre-approved standard contract terms
- Perform contract terms quality assurance validation checks
- Create non-standard contract terms
- Support approval rules for standard and non-standard contract terms
- Generate a formatted contract for review and customer presentment
- Capture customer acceptance details
- Upload and manage the signed agreement as a contract document attachment



7.1.1 Contract Terms Library Setup

Clauses and contract templates are created and approved within the contract terms library. Once approved, clauses are available for use in contract templates. Clauses are added and organized in contract templates, that are then approved for use, and assigned to a quote. Assigning a contract template to a quote begins the contract

terms negotiation. Refer to the *Oracle Contracts Implementation and Administration Guide, Release 11i* for details on the contract terms library.

The contract terms library supports the following:

- Defining effective dates for a clause by specifying start and end dates
- Versioning clauses and maintaining version history
- Defining clause relationships — Two or more clauses may be defined as incompatible to one another when used on a quote. Clauses can also be defined as alternates, where one clause can be used in place of another.
- Locking text — Prevent the clause text from being modified on the quote
- Defining global clauses that can be used by all business divisions
- Capturing clause variables in a clause to be assigned with values for specific contract situations

Clauses may be created using two types of clause variables:

- User defined: Specified manually in the Contract Terms at the time of authoring/negotiating a quote.
- System: Automatically default into the clause text based on their data element values within the Quote

The following table lists the clause placeholders (variables) are available for use in clauses when authoring clauses:

Table 7–1 Clause Variables

Level	System Variable Name	Variable Description	Available for
Header	OKCSS_PA_NUMBER	Agreement number	Clauses, QA
Header	OKCSS_PA_NAME	Agreement name	Clauses, QA
Header	OKCSS_QUOTE_NUMBER	Quote Number	Clauses, QA
Header	OKCSS_CUSTOMER_NAME	Customer Name	Clauses, QA
Header	OKCSS_CUSTOMER_NUMBER	Customer Number	Clauses, QA

Table 7-1 Clause Variables

Level	System Variable Name	Variable Description	Available for
Header	OKCSS_CUST_PO_NUMBER	Customer Purchase Order Number	Clauses, QA
Header	OKCSS_VERSION_NUMBER	Version Number	Clauses, QA
Header	OKCSS_CUST_CONTACT_NAME	Customer Contact Name	Clauses, QA
Header	OKCSS_SALESREP_NAME	Salesrep Name	Clauses, QA
Header	OKCSS_CURRENCY_CODE	Currency Code	Clauses, QA
Header	OKCSS_CURRENCY_NAME	Currency Name	Clauses, QA
Header	OKCSS_CURRENCY_SYMBOL	Currency Symbol	Clauses, QA
Header	OKCSS_FREIGHT_TERMS	Freight Terms	Clauses, QA
Header	OKCSS_SHIPPING_METHOD	Shipping Method	Clauses, QA
Header	OKCSS_PAYMENT_TERM	Payment Terms	Clauses, QA
Header	OKCSS_SUPPLIER_NAME	Supplier Name (Internal Organization)	Clauses, QA
Line	OKCSS_LINES (table variable)	Lines	Clauses

Authoring Contract Terms

Enabling integration with Sales Contracts provides users with the ability to author contract terms directly within Oracle Quoting.

A contract template can be set as the default for each new Quote, or users can select an applicable contract template at the time of authoring. Contract templates contain standard, pre-approved clauses that are numbered and organized under sections so they appear in the desired order when printed. Once a contract template is assigned

to the Quote, users with appropriate access can change the contract terms during negotiation.

There are two levels of access for contract terms authoring. Oracle Quoting passes the level to Sales Contracts appropriate to the status of the quote and quote security setup.

Update — Used if the quote is updateable. The user can make changes to the contract terms.

To update contract terms:

- You must use the highest version of the quote
- The quote must not be expired
- The quote must not be submitted for batch pricing
- The quote must not be of status *Order Submitted*
- You must have update access to the quote

View — Users can only view the quote and the contract terms on the quote. No updates are allowed, except to add or modify document attachments.

Note: If a quote is shared with the Sales Team, only sales team members with full access will be able to access the Contract Terms page.

7.1.2 Validation of Contract Terms

Oracle Quoting provides a facility to validate contract terms at certain times during the quote life cycle.

The validation process checks for any potential issues with the clauses being used in the quote, including:

- Clauses that are no longer effective
- Two or more clauses that are incompatible
- Clauses that do not have values substituted for clause variables
- Clauses that have newer versions available

Validation is performed prior to the following status transitions and Quoting functions:

- Approval Submission
- Print Quote
- Web Publishing a quote (with contract terms) to iStore

You can also run validation manually from the **Contract Terms** page. Upon completion, Oracle Quoting lists all warnings that occurred during validation. The user can choose whether they want to fix warnings. For more information on warnings, see the *Validation Errors and Warnings* section of the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

Note: Although it is not required, it is strongly recommended that Approvals functionality is implemented with Sales Contracts integration.

7.1.3 Printing Quotes With Contract Terms

To print quotes containing contract terms, you must use the Oracle XML Publisher printing solution. Therefore, it is mandatory that the profile option *ASO: Print Quote Method* be set to *XML Publisher*.

The Oracle XML Publisher printing solution provides the ability to generate a printable PDF document that can be formatted according to the layout standards for individual business organizations. The layout of the quote will be dictated by a customizable XSL-FO stylesheet, specified in the profile option *ASO: Default Layout Template*. All quotes printed using XML Publisher are in PDF format. *ASO: Default Layout Template* also provides the *Preview Terms* format.

Note: On the default stylesheet template, no table variables will be rendered. However, the template will include a section providing details as to how to render table variables.

The printed quote will contain contract terms, regardless of quote status. If the quote is non-executable, the printed quote contains contract terms and a disclaimer (if one exists). If the quote is executable, the printed quote contains contract terms and a signature block.

The printed terms on the quote include:

- An ordered list of sections, with a label for each section

- The ordered list of clauses within each section, with the sequence number, label, and the text of the clause

For more information on the Print Quote, refer to [Section 4.18, "Setting Up the Print Quote Functionality"](#). For more information on Print Quote profile options, refer to [Section A.2.14, "Oracle Quoting Profile Options for Print Quote"](#).

7.2 Enabling Sales Contracts Functionality

In order to enable sales contracts functionality in Oracle Quoting, you must perform the following:

- [Section 7.2.1, "Set Sales Contracts profile values"](#)
- [Section 7.2.2, "Set up Oracle Quoting profile options"](#)
- [Section 7.2.3, "Set Up Approvals Rules"](#)

7.2.1 Set Sales Contracts profile values

To enable the Sales Contracts functionality in Oracle Quoting, set the profile option *OKC: Enable Sales Contracts* to *Yes*. For more information on Oracle Sales Contracts profile options, refer to [Section A.4, "Oracle Sales Contracts Profile Options"](#) and the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

7.2.2 Set up Oracle Quoting profile options

If Contracts functionality is enabled, you must set the following profile options:

- ASO: Print Quote Method must be set to XML Publisher
- ASO: Default Layout Template

Optionally, the profile *ASO: Default Contract Template*, which determines the default contract template for standard contract terms to be included on a quote, should be set.

For a complete list of Sales Contract related Quoting profile options, refer to [Section A.2, "Current Profile Options"](#). For more information on setting Oracle Quoting profile options, refer to [Chapter 4.2, "Setting System Profile Options"](#).

7.2.3 Set Up Approvals Rules

You must set up Approvals rules using the following seeded approval attributes:

- **Clause Changes from the Contract Template** — Clauses manually added/removed from a Quote or new clauses added to a template after instantiation. Possible values are:
 - **NO_CHANGE** — No change from template
 - **ARTICLES_CHANGED** — Clauses changed from template
- **Non-Standard Terms** — Clauses that have been newly authored or standard clauses modified from the contract library. Possible values are:
 - **NONE** — No clauses exist
 - **ONLY_STANDARD** — Only standard clauses exist
 - **NON_STANDARD** — Contains non-standard clauses

For information on setting up approval rules, see the *Oracle Approvals Management Implementation Guide*.

Integrating Oracle Quoting With Oracle Incentive Compensation

This section contains information on integrating with Oracle Incentive Compensation and setting up sales credit allocation and projected commission functionality.

- [Section 8.1, "Overview of OIC Integration"](#)
- [Section 8.2, "Setting Up Sales Credit Allocation"](#)
- [Section 8.3, "Setting Up Projected Commission Calculation"](#)

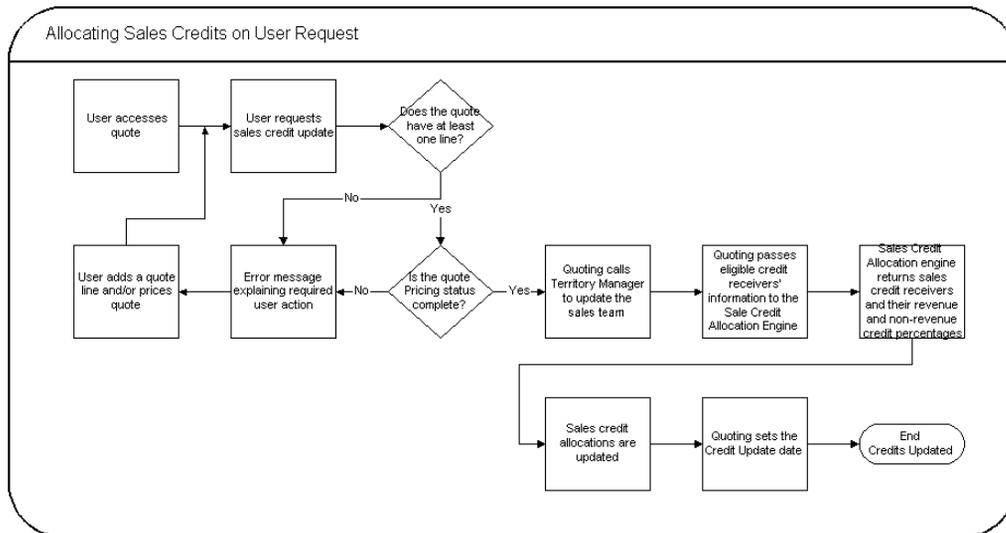
8.1 Overview of OIC Integration

You can integrate with Oracle Incentive Compensation (OIC) to allocate sales credits based on predefined credit rules. Additionally, you can set up OIC to calculate users' projected commissions for a quote, per quote line, and per product category.

For complete information on OIC, refer to the *Oracle Incentive Compensation Implementation Guide*.

8.1.1 Sales Credit Allocation

Sales credit allocations take place when requested by the user and/or at order submission, depending on the value of the profile option ASO: Automatic Sales Credit Allocation. Refer to [Section A.2.19, "Quoting Profile Options for Security"](#) for more information.



When allocating sales credit, you can determine if sales credit allocation takes place at the header level or header and line level. Upon sales credit update request, Quoting calls Territory Manager to update the sales team. The eligible resources and their roles are then passed to OIC. The sales credit allocation engine determines the credit distribution. The quote is then updated with this distribution.

Note: You can also choose to use an external credit engine for sales credit allocations. See [Section 4.16, "Setting Up Sales Team Assignment and Sales Credit Allocation"](#) for more information.

When a sales credit allocation is initiated, Quoting calls the OIC Sales Credit Allocation (SCA) Engine. Quoting passes the following information to the sales credit allocation engine:

- Transaction Source — Oracle Quoting
- Resource ID — for each eligible credit receiver
- Role ID — for each eligible credit receiver
- Date — SYSDATE

After the information processes through the rules engine, the OIC SCA returns the credit percentages for each resource.

If OIC returns revenue credits totalling less than 100% but more than 0%, Quoting will assign the remainder of the revenue credit to the primary salesperson.

If OIC returns revenue credits totalling 0% or null, Quoting will not update the transaction's credit. This error should not happen if you ensure that a credit rule will always qualify for each transaction and that at least one role in a quote matches a role in the winning credit rule.

Note: For each revenue credit receiver returned by the sales credit allocation engine, Quoting defaults the credit type from the first OM quota sales credit type. For each non-revenue receiver, Quoting defaults the first OM non-quota credit type.

Eligibility

To be eligible for sales credit allocation, a resource must meet all of the following conditions:

- Be a valid sales representative
- Be on the quote's sales team
- Have a specified role on the sales team. Only roles of role type Sales, TeleSales, Field Sales, or Partners Relationship Management can be specified on the sales team.

Sales Credit Allocation Rules

You can define sales credit allocation rules in OIC to determine how sales credit percentages are distributed. Oracle Incentive Compensation seeds certain attributes for the Oracle Quoting transaction source. Attributes are used to determine which credit rule is applied. See [Section 8.2.1, "Seeded Attributes"](#) for a complete list of seeded attributes.

8.1.2 Projected Commission

With Oracle Incentive Compensation integration, Quoting users can view their projected commission for:

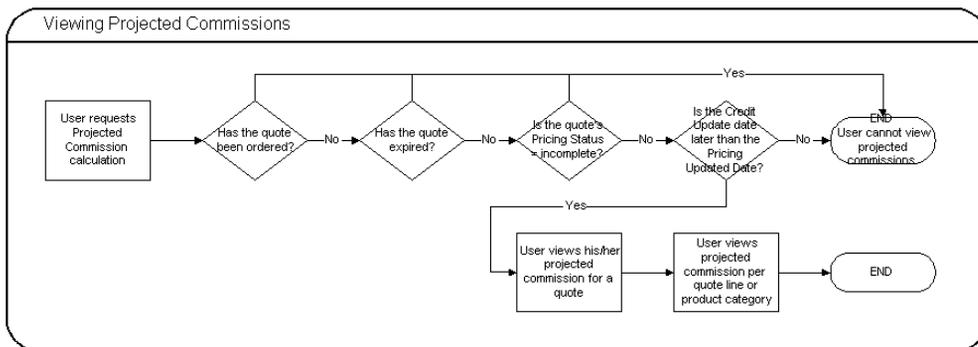
- For an entire quote
- For each quote line

- For each product category

Note: Projected commission will be more accurate if the compensation plan is based on selling price, sales credit percentage, quota, and product sold. If you use other factors when calculating the projected commission, there may be a significant difference between the projected and actual commissions.

The projected commission calculation includes both revenue and non-revenue sales credits. When a user requests calculation of projected commission, OIC calculates the projected commission based on the following assumptions:

- The quote will be placed as an order in its current state (as is)
- The quote will be placed as an order today



Quoting passes the following information to OIC for each quote line:

- Resource ID
- Product ID
- Date
- Currency Code of quote
- Amount — A line's amount = Total Selling Price * (the user's Revenue Sales Credit Percentage + the user's Non-Revenue Sales Credit Percentage); if the user is not a sales credit receiver, the Amount is zero

OIC returns the projected commission per line for the user. The quote level commission is then calculated by adding the lines' projected commissions. Projected commission for a category is calculated by adding the projected commissions for lines with a product in that category. The categories are derived from the profile option ASO: Category Set or if this profile is null, the default category set for the *Order Management* functional area.

Note: If the applicable category set allows products to belong to multiple categories, Quoting will not calculate or display commission totals per product category. This is due to the fact that category-level commission calculations would count a given line multiple times if a product belonged to multiple categories.

8.2 Setting Up Sales Credit Allocation

NOTE: Automatic sales team assignment must be set up and enabled if you want to use sales credit allocation. The profile option ASO: Automatic Sales Team Assignment must be set to Partial or Full.

Note: If the profile option ASO: Automatic Sales Credit Allocation is set to Full, the sales credit allocation engine is called upon placing an order. Therefore, if a user has manually entered sales credits, they may be lost when placing an order.

If you choose to implement the sales credit allocation functionality there are a number of setup steps you must complete:

1. Set the sales credit allocation profile options.

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

2. Set up sales credit allocation rules for the Oracle Quoting transaction source in OIC.

When setting up credit rules, ensure that:

- a. Credit rules' attributes and roles in OIC are synchronized with territories' qualifiers and roles in Territory Manager. For example, if Territory Manager set up assigns the role Field Sales Role to quotes for the customer Business

World, then credit rules with Business World selected for the attribute Customer Name, should assign credit for this role.

- b. For credit rules with the Transaction Source, Oracle Quoting, only the following role types should be assigned sales credit:
 - * Sales
 - * TeleSales
 - * Partners Relationship Management
 - * Field Sales

If you specify roles of other types in a credit rule, the credit allocated for these roles will not be assigned to anyone on the quote.

For complete information on setting up Oracle Incentive Compensation, refer to *Oracle Incentive Compensation Implementation Guide*.

8.2.1 Seeded Attributes

The following attributes are seeded for the Oracle Quoting transaction source in OIC.

OIC Seeded Attributes for the Oracle Quoting Transaction Source

Attribute	Header and/or Line Level	Description
Total	Header	Total quote amount prior to shipping and freight charges and taxes
Total List Price	Header	Total quote list price
Total Selling Price	Header	Total quote selling price
Total Adjustment Amount	Header	The absolute amount of the total manual adjustment amount for a quote.
Total Adjustment Percent	Header	The percentage of total list price, of the total manual adjustment amount for a quote.
Line Total	Line	Total quote line amount prior to shipping and freight charges and taxes

OIC Seeded Attributes for the Oracle Quoting Transaction Source

Attribute	Header and/or Line Level	Description
Unit List Price	Line	Unit list price for a quote line
Unit Selling Price	Line	Unit selling price for a quote line
Line Adjustment Amount	Line	The absolute amount of the sum of the header and line manual adjustment amount for the quote
Line Adjustment Percent	Line	The percentage of unit list price, of the sum of the header and line manual adjustment amount for a quote line
Quantity	Line	Quote line quantity
Unit of Measure	Line	Quote line unit of measure
Product	Line	Inventory item on a quote line
Account Number	Both	Quote-to customer account number
Customer Name	Both	Name of quote-to customer
Area Code	Both	Area code of phone number for the quote-to customer contact if customer is of type Organization or the quote-to customer if customer is of type Person
City	Both	City in quote-to customer party site address
County	Both	County in quote-to customer party site address
State	Both	State in quote-to customer party site address
Province	Both	Province in quote-to customer party site address
Country	Both	Country in quote-to customer party site address
Postal Code	Both	Postal code in quote-to customer party site address
Campaign	Both	Campaign selected for quote.
Sales Channel	Both	Sales channel selected for quote

8.3 Setting Up Projected Commission Calculation

NOTE: Automatic sales team assignment and sales credit allocation must be enabled in order to use projected commission functionality. ASO: Automatic Sales Team Assignment and ASO: Automatic Sales Credit Allocation must be set to Full or Partial.

If you choose to implement the projected commission functionality there are a number of setup steps you must complete:

1. Set the projected commission profile option.

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

2. The OIC Administrator must create a compensation plan that includes plan elements possessing formulas with forecasting expressions.
3. The OIC Administrator must assign an OIC compensation plan to a sales compensation role.
4. The OIC Administrator must assign a sales compensation role to the sales representative. The sales representative will inherit the compensation plan from the sales compensation role.
5. The OIC Administrator must design the Projection Classification rule set and synchronize the rule set so that the quote lines can be classified for calculation.

Integrating Oracle Quoting With Oracle Territory Manager

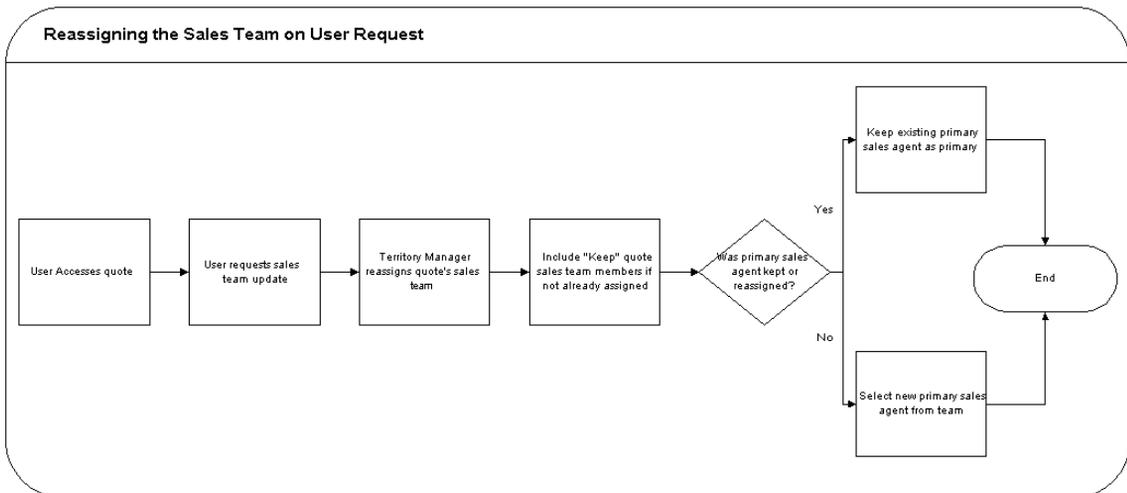
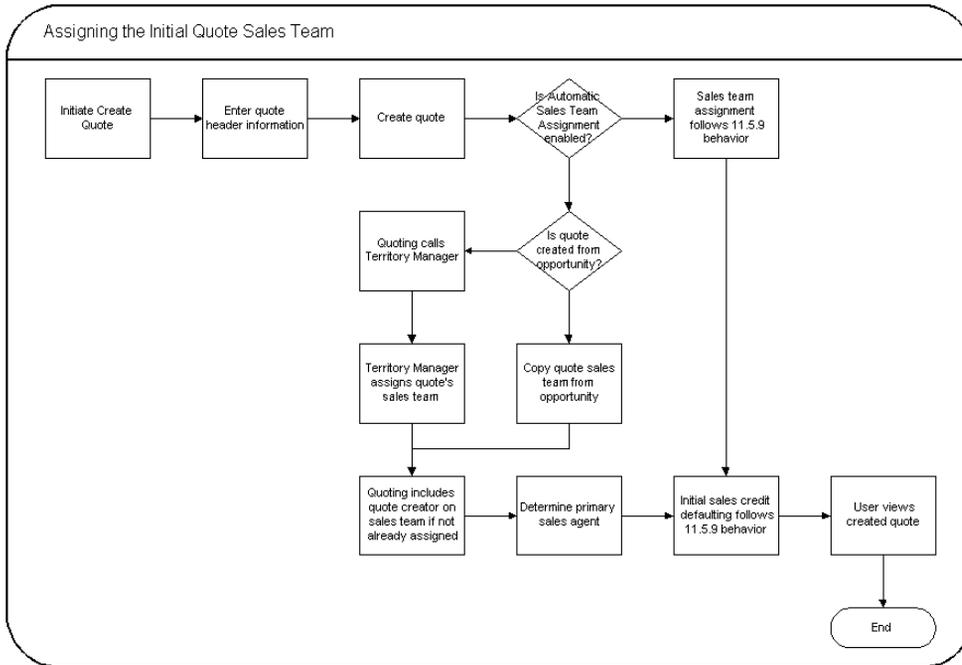
This section contains information on integrating with Oracle Territory Manager and setting up sales team assignment functionality.

- [Section 9.1, "Overview of Territory Manager Integration"](#)
- [Section 9.2, "Setting Up Sales Team Assignment Functionality"](#)
- [Section 9.3, "Territory Qualifiers Supported by Oracle Quoting"](#)

9.1 Overview of Territory Manager Integration

Oracle Quoting integrates with Oracle Territory Manager to assign sales teams to quotes at quote creation, on user request or at order submission. Administrators use Oracle Territory Manager to set up the sales territories and define territory assignment rules. Quoting will use these territories to automatically derive sales teams for quotes.

If and when automatic sales team assignment takes place is determined by the profile option ASO: Automatic Sales Team Assignment. See [Appendix A, "Oracle Quoting Profile Options"](#) for more information.



Quoting calls Territory Manager to determine the appropriate sales team, including the following information for each resource:

- Resource
- Group (of usage Sales or TeleSales for sales representative resources)
- Role — Quoting will only display roles in the sales team information if automatic sales team assignment and automatic sales credit allocation are both implemented. Only roles of role type Sales, TeleSales, Field Sales, and Partners Relationship Management will be displayed in the application and used to calculate sales credit allocations.
- Territory ID
- Full Access Flag

Note: During assignment, Territory Manager may return multiple instances of a resource with different role/group combinations. In this instance, Quoting will randomly select one role-group combination to populate the resource's sales team details. On subsequent calls, if an existing resource does not have the Keep flag selected, Quoting will keep the existing role-group combination only if Territory Manager returns that combination for the resource. If the role-group data does not match any combination returned by Territory Manager, Quoting will select a new combination randomly.

When a sales team assignment occurs, all members of the existing sales team that do not have the Keep flag selected are removed from the sales team, unless Territory Manager reassigns them to the quote. This includes the primary sales agent. If the Keep flag is selected, the resource remains on the sales team and the full access flag setting, role, and group for that resource will not change based on Territory Manager assignment.

Note: If enabled, sales team assignment also applies for iStore carts for which sales rep assistance is requested.

Primary Sales Agent Assignment

If the profile option ASO: Automatic Sales Team Assignment is set to Partial or Full, the Primary Sales Agent is selected at quote creation as follows, regardless of whether a quote is created from an opportunity, from a template, or standalone:

- If the quote creator is a valid sales representative, the quote creator becomes the primary sales representative.
- If the quote creator is not a valid sales representative, the primary sales agent is selected randomly from the valid sales representatives on the sales team who have the Full Access flag selected.
- If there are no valid sales representatives on the sales team with full access, the primary sales agent defaults from the ASO: Default Salesrep profile option. This resource is added to the sales team with the Full Access flag selected.

If the resource previously selected as primary sales agent is removed from the sales team during automatic sales team assignment, a new primary sales agent is selected randomly from the sales team members that are valid sales representatives and have the Full Access flag selected. If none of the assigned resources meet these criteria, the primary sales agent defaults from ASO: Default Salesrep.

You can use Territory Manager's account-based and geography-based territories, or you can specify a territory as valid for quote assignment and set up territories based on products.

9.2 Setting Up Sales Team Assignment Functionality

When setting up territories use the following information:

- Usage: *Oracle Sales and TeleSales*
- Transaction type: Territory Manager has a seeded transaction type for Quoting called *Quote*.
- Transaction qualifiers: Use the transaction qualifiers listed in [Section 9.3, "Territory Qualifiers Supported by Oracle Quoting"](#) to set up rules for assigning transaction types.
- Resources: Use Employee resources, as these are currently the only resource types supported in Oracle Quoting.

If you choose to implement the sales team assignment functionality using Oracle Territory Manager there are a number of setup steps you must complete.

1. Set the sales team assignment profile option.
For information on the sales team assignment profile option, refer to [Appendix A, "Oracle Quoting Profile Options"](#)
2. Set up territories in Oracle Territory Manager.
3. Set up the *ASO: Default Salesrep* profile option.

For more information on setting up Oracle Territory Manager, see the *Oracle Territory Manager Implementation Guide*.

9.3 Territory Qualifiers Supported by Oracle Quoting

You can use the following territory qualifiers to set up territory assignment rules for Quoting.

Table 9–1 Territory Qualifiers for Setting up Territory Assignment Rules in Quoting

Usage	Type	Territory Qualifier	Description
Sales	Quote	Product Category	Inventory item category for one or more products on a quote. If a product is assigned to multiple categories, one of the item categories must be the same as the qualifier category. The category set specified in the profile <i>ASO: Category Set for the Application Territory Manager</i> is used to determine an item's categories. If this profile is not set, then the category set selected in Inventory for the functional area "Order Management" is used for this purpose.
Sales	Account	Account Code	Party Site ID is made up of the Quote-To Customer Name and address.
Sales	Account	Account Hierarchy	Organizations of relationship <i>Subsidiary Of</i>
Sales	Account	Area Code	Area code of phone number for the quote-to customer contact if the customer is of type <i>Organization</i> or the quote-to customer if the customer is of type <i>Person</i>
Sales	Account	City	City in quote-to customer party site address

Table 9–1 Territory Qualifiers for Setting up Territory Assignment Rules in Quoting

Usage	Type	Territory Qualifier	Description
Sales	Account	Country	Country in quote-to customer party site address
Sales	Account	County	County in quote-to customer party site address
Sales	Account	Customer Category	Customer category in Accounts Receivable for quote-to customer party
Sales	Account	Customer Name	Name of quote-to customer party (person or organization)
Sales	Account	Customer Name Range	Range of names of quote-to customer parties (person or organization)
Sales	Account	Number of Employees	Total employees in quote-to customer party's organization
Sales	Account	Postal Code	Postal code in quote-to customer party site address
Sales	Account	Province	Province in quote-to customer party site address
Sales	Account	SIC Code	SIC code of quote-to customer party
Sales	Account	Sales Partner Of	Organization of relationship <i>Partner Of</i>
Sales	Account	State	State in quote-to customer party site address

Oracle Quoting Profile Options

This chapter describes required profile option settings. Topics include:

- [Section A.1, "Setting System Profile Options"](#)
- [Section A.2, "Current Profile Options"](#)
- [Section A.3, "Oracle CRM Foundation Profile Options"](#)
- [Section A.4, "Oracle Sales Contracts Profile Options"](#)
- [Section A.5, "Oracle Order Management Profile Options"](#)
- [Section A.6, "Oracle Pricing Profile Options"](#)
- [Section A.7, "Oracle Field Sales Profile Options"](#)
- [Section A.8, "Oracle TeleSales Profile Options"](#)
- [Section A.9, "Multi Organization \(MO\) Profile Options"](#)
- [Section A.10, "Oracle iStore Profile Options"](#)
- [Section A.11, "Oracle Self Service Web Applications Profile Options"](#)

A.1 Setting System Profile Options

For a detailed description of setting profile options, refer to the Oracle Application System Administrator's Guide.

Prerequisites

None

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Profile > System > Find System Profile Values window

A.2 Current Profile Options

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

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

If you are using Quoting standalone, you should set profile options to either *Order Capture* for the Forms UI, or *Oracle Quoting* for the HTML UI at the Application level.

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

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

- **ASO: Default Contract Template**
- **ASO: Default Order Type**
- **ASO: Default Salesrep**

A.2.1 Oracle Quoting Profile Options for Approvals

The following profile options apply to Approvals functionality.

1. ASO: Enable Approvals

Determines availability of approvals functionality.

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

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

2. **ASO: Allow Skip Approvers**

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

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

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

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

Table A–1 Oracle Quoting Profile Options for Approvals

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

A.2.2 Oracle Quoting Profile Options for Availability to Promise (ATP)

The following profile options apply to ATP functionality.

1. **ASO: ATP Use Sourcing Rule**

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

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

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

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

If null, then the default value NO is assumed.

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

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

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

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

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

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

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

3. ASO: Default Ship From Org

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

Mandatory if ATP and Reservations are performed at order submission.

If null, no default value is assumed.

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

Table A-2 Oracle Quoting Profile Options for ATP

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: ATP Default Customer	N/A	Both	Site, Application, Responsibility
ASO: ATP Default Ship To Site	N/A	Both	Site, Application, Responsibility

Table A–2 Oracle Quoting Profile Options for ATP

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

A.2.3 Oracle Quoting Profile Options for Configurator

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

The following profile options apply to Oracle Configurator integration.

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

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

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

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

If null, defaults to **Yes**.

2. ASO: Allow Quantity Updates for Component Item

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

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

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

If null, defaults to **Yes**.

3. ASO: Configurator URL

Specifies the URL for the Configurator window.

Mandatory if Oracle Configurator is used for product configurations.

If null, no default value is assumed.

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

Table A-3 Oracle Quoting Profile Options for Configurator

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

A.2.4 Oracle Quoting Profile Options for Sales Contracts Integration

The following profile options apply to Oracle Sales Contracts integration.

1. ASO: Default Contract Template

Determines the default contract template for standard contract terms to be included on a quote.

2. ASO: Default Layout Template

Determines the default print template to be used for printing a quote and previewing contract terms on a quote. This profile is mandatory if ASO: Print Quote Method is set to *XML Publisher* and therefore, if Sales Contracts integration is enabled.

3. ASO: Print Quote Method

Determines the method for printing quotes. Available values are: *Oracle Reports* or *XML Publisher*. If Sales Contracts integration is enabled, this profile must be set to *XML Publisher*.

Table A-4 Oracle Quoting Profile Options for Sales Contracts

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Contract Template	N/A	Both	Site, Application, Responsibility
**ASO: Default Layout Template	N/A	Both	Site, Application, Responsibility
*ASO: Print Method	Oracle Reports	Both	Site

A.2.5 Oracle Quoting Profile Options for Credit Checks

The following profile options apply to credit checks:

1. ASO: Enable Credit Check

Determines if the credit check functionality is enabled.

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

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

If null, defaults to **No**.

2. ASO: Credit Check Rule

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

If not set, internal credit checks cannot be performed.

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

Table A-5 Oracle Quoting Profile Options for Credit Checks

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Credit Check	No	Both	Site, Application
ASO: Credit Check Rule	N/A	Both	Site, Application, Responsibility

A.2.6 Oracle Quoting Profile Options for Debugging

The following profile option applies to debugging.

1. ASO: Enable ASO Debug

Enable the ASO debug messages for a single session.

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

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

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

Table A-6 Oracle Quoting Profile Options for Debugging

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

A.2.7 Oracle Quoting Profile Options for Expiration Date

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

The following profile options apply to the expiration date.

1. ASO: Default Expiration GL Calendar

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

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

2. ASO: Default Expiration Period Type

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

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

3. ASO: Quote Duration

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

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

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

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

Table A-7 Oracle Quoting Profile Options for Expiration Date

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Expiration GL Calendar	None	Both	Site
ASO: Default Expiration GL Period Type	None	Both	Site
**ASO: Quote Duration	30	Both	Site, Application, Responsibility, User

A.2.8 Oracle Quoting Profile Options for Inventory

The following profile option applies to inventory.

1. ASO: Enable Manual Warehouse Selection

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

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

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

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

Table A-8 Oracle Quoting Profile Options for Inventory

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

A.2.9 Oracle Quoting Profile Options for Manual Discounts

The following profile option applies to manual discounts.

1. ASO: Discounting Privilege

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

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

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

If set to **None**, the user cannot manually adjust a price by changing the Unit Selling Price in the Oracle Quoting UI, or apply non-automatic adjustments or charges, or override adjustment/charge values.

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

2. ASO: Enable Promotional Good Price Override

Determines if the user can override the price of a promotional good line.

If set to **Yes**, a user with ASO: Discounting Privilege set to Full, can also override the price for a promotional good.

If set to **No**, the user cannot override the price of a promotional good.

If null, defaults to **No**.

3. ASO: Require Minus Sign for Manual Discount

Determines the format for entering manual discounts and surcharges on the Lines page (HTML UI). This profile applies only to the Line Discount and Header Discount fields.

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

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

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

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

Table A–9 Oracle Quoting Profile Options for Manual Discounts

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

A.2.10 Oracle Quoting Profile Options for Orders

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

The following profile options apply to orders.

1. ASO: Default Order Type

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

If null, no default value is assumed.

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

2. ASO: Default Order State

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

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

3. ASO: Default Return Reason

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

Mandatory for all return lines.

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

4. ASO: Default E-Business Quote Screen

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

5. ASO: OM Defaulting

Determines whether Oracle Order Management should default values, following Oracle Order Management rules, for the following order attributes, when creating an order from a quote. All attributes apply to both header and line level.

- agreement_id
- fob_code
- freight_terms_code
- packing_instructions
- payment_term_id
- shipment_priority_code
- shipping_instructions

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

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

6. ASO: Order Feedback Queue Retention Time

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

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

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

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

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

7. ASO: Quote Conversion Type

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

If null, no default value is assumed.

8. ASO: Reservation Level

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

Mandatory if reservations are performed.

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

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

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

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

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

Table A-10 Oracle Quoting Profile Options for Orders

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default E-Business Quote Screen	Quoting	Forms	Site, Responsibility
*ASO: Default Order Type	N/A	Both	Site, Application, Responsibility, User
ASO: Default Order State	Booked	Both	Site, Application, Responsibility, User

Table A–10 Oracle Quoting Profile Options for Orders

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

A.2.11 Oracle Quoting Profile Options for Oracle Field Sales Integration

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

The following profile option applies to OSO integration.

1. ASO: Enable OSO Integration

Indicates whether OSO is integrated with Oracle Quoting.

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

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

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

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

Table A–11 Oracle Quoting Profile Options for OSO Integration

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

A.2.12 Oracle Quoting Profile Options for Payments

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

The following profile options apply to payments.

1. ASO: Credit Card Authorization

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

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

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

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

2. ASO: Receipt Method

Determines the receipt method for credit card authorization.

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

If null, no default value is assumed.

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

Table A–12 Profile Options for Payments

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Credit Card Authorization	No	HTML	Site, Application, Responsibility, User

Table A–12 Profile Options for Payments

Profile Option	Default Value	HTML or Forms UI	Application Level
**ASO: Receipt Method	N/A	HTML	Site, Application, Responsibility, User

A.2.13 Oracle Quoting Profile Options for Pricing and Tax

The following profile options apply to the pricing functionality.

1. ASO: Calculate Price

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

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

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

If null, defaults to **Automatic**.

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

2. ASO: Calculate Tax

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

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

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

If null, defaults to **Automatic**.

3. ASO: Enable Batch Processing

Determines how the quote is priced. If you choose to price the quote interactively, you must wait while the quote is being priced. If the quote is

priced via a batch process, you will be notified when the pricing call is complete.

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

Table A–13 Profile Options for Pricing

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

A.2.14 Oracle Quoting Profile Options for Print Quote

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

The following profile options apply to the print quote functionality.

1. ASO: Company Report Logo

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

2. ASO: Print Method

Determines the method for printing quotes. Available values are: *Oracle Reports* or *XML Publisher*. If Sales Contracts integration is enabled, this profile must be set to *XML Publisher*.

3. ASO: Print Quote Reports Directory

Specifies the directory location for the report source files.

4. ASO: Print Quote Show Attachments

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

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

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

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

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

Table A–14 Oracle Quoting Profile Options for Print Quote

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

A.2.15 Oracle Quoting Profile Options for Quote Templates

The following profile option applies to quote templates.

1. ASO: Manage Quote Templates

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

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

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

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

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

Table A–15 Oracle Quoting Profile Options for Quote Templates

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

A.2.16 Oracle Quoting Profile Options for Quotes

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

The following profile options apply to quotes.

1. ASO: Auto Account Creation

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

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

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

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

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

2. ASO: Automatic Numbering

Determines if the system automatically generates a quote number.

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

Note: This profile option must be set to **Yes** if you want to copy quotes in the HTML UI of Quoting.

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

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

3. **ASO: Category Set**

In the HTML UI, determines the category set used when:

- Searching the product catalog
- Searching for trade-in products
- Reconfiguring a product from the Installed Base
- Specifying service reference information for a serviceable item in the Installed Base

In the Forms UI, determines the category set used when:

- Searching the product catalog (with interMedia enabled)
- Searching for trade-in products
- Reconfiguring a product from the Installed Base
- Specifying service reference information for a serviceable product in the Installed Base or on a Pending Order.

Additionally, category set is used in the following instances:

- To **Print Subtotals by Category** when printing a quote
- To display Subtotal by product category for Projected Commissions
- For the categories used to set up Territory Management
- For the Product LOV in the set up screen for Sales Credit Allocation
- For the seeded product category attribute in Quote approvals setup

If ASO: Category Set is null, it will use the default category set for the Order Management functional area.

4. **ASO: Default Currency Code**

If null, the default value USD is assumed.

5. **ASO: Default Customer Type**

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

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

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

6. ASO: Default Ordered Qty in OC UI

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

If null, a default quantity of **1** is assumed.

7. ASO: Default Quote Status

Determines the default status of a new quote.

8. ASO: Default Sales Channel

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

9. ASO: Display Header Flexfields with Quote Header in HTML UI

Determines if header-level descriptive flexfields appear with the quote header information in the HTML UI.

If set to **Yes**, header level descriptive flexfields appear on the Create Quote, Create Quote From Opportunity, and General pages.

Note: If this profile option is set to Yes, it is recommended that you disable the Additional Information link in the sidebar.

If set to **No**, the header-level descriptive flexfields does not appear on these pages.

If null, defaults to **No**.

10. ASO: Enable Line Level Billing

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

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

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

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

11. ASO: Enable Line Type

Allows the user to enter line types and categories.

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

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

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

12. ASO: GSA Pricing

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

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

Note: This profile option value applies only to the Forms user interface (UI) of Quoting. Warnings are not displayed in the HTML UI. If you are using the HTML UI and you set this profile to Warning, Quoting will allow you to successfully change the price (below GSA price) without any warnings.

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

If null, GSA violation checks are ignored.

13. ASO: Max Number of Results

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

If null, defaults to **100**.

14. ASO: Require Service Reference on Add to Quote

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

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

If set to **No**, the user must complete the service reference either when adding the service to the quote or before placing the order.

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

Note: Regardless of whether this profile is set to Yes or No, you must specify the service reference to place an order.

15. ASO: Show Line Level Tax Details

Determines if tax details are displayed at the line level.

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

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

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

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

Table A-16 Quoting Profile Options for Quotes

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Auto Account Creation	As Required	Both	Site, Application
*ASO: Automatic Numbering	Yes	Both	Site, Application, Responsibility
ASO: Category Set	NA	Both	Site, Application
ASO: Default Currency Code	USD	Forms	Site, Application, Responsibility, User
ASO: Default Customer Type	Organization	HTML	Site, Application
ASO: Default Ordered Quantity in OC UI	1	Both	Site, Application, Responsibility, User
*ASO: Default Quote Status	Draft	Both	Site, Application
ASO: Default Sales Channel	N/A	Both	Site, Application, Responsibility, User
ASO: Display Header Flexfields with Quote Header in HTML UI	No	HTML	Site
ASO: Enable Line Level Billing	No	Both	Site, Application, Responsibility

Table A–16 Quoting Profile Options for Quotes

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Line Type	No	Both	Site, Application, Responsibility, User
ASO: GSA Pricing	N/A	Both	Site, Application
ASO: Max Number of Results	100	Forms	Site, Application
ASO: Require Service Reference on Add to Quote	Yes	Forms	Site
ASO: Show Line Level Tax Details	No	HTML	Site, Application, Responsibility

A.2.17 Quoting Profile Options for Sales Supplement

The following profile options apply to sales supplement functionality.

1. ASO: Default Header Level Sales Supplement Template

Sets the default header level sales supplement template.

2. ASO: Default Line Level Sales Supplement Template

Determines the default line level template.

3. ASO: Enable Sales Supplement

Determines if the sales supplement functionality is accessible to users.

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

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

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

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

Table A–17 Quoting Profile Options for Sales Supplement

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Header Level Sales Supplement Template	N/A	Both	Site, Application, Responsibility, User

Table A–17 Quoting Profile Options for Sales Supplement

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

A.2.18 Oracle Quoting Profile Options for Searching

The following profile option applies to Search functionality.

1. ASO: Enable Intermedia Search

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

If set to **Yes**, the product search uses the profile option ASO: Category Set in the product search LOV.

If set to **No**, the product search uses the existing search tables/views and does not use the profile option ASO: Category Set.

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

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

Table A–18 Quoting Profile Options for Sales Supplement

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

A.2.19 Quoting Profile Options for Security

Security profile options fall into four categories:

General — Turn security on and off

Quote Access Security — Determine which quotes are available to users and the level of access they have for those quotes

Quote Function Security — Determine which actions users, with update access, can perform on a quote

New Quote Security — Determine if users can create new quotes

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

General

The following profile options apply to general Quote Security.

1. ASO: Enable Security Check

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

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

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

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

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

2. ASO: Security Enable From API

Determines if security is enabled through the security APIs. This profile is mandatory if Security is enabled. Also determines if Saved Searches display quotes based on salesperson.

Note: If Territory Manager and/or Oracle Incentive Compensation integrations are enabled, you must set this profile to **Yes**.

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

For Saved Searches: If you designate a salesperson on the Saved Search form and set this profile to **Yes**, the saved search displays all quotes where the salesperson is on the Sales Team or is the primary salesperson. If set to **Yes** and the Restrict to Primary Salesperson and Primary Sales Group checkbox is selected, displays all quotes where the salesperson is the primary salesperson.

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

For Saved Searches: If set to **No**, you will not be able to restrict saved searches by salesperson.

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

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

Table A–19 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Enable Security Check	No	Both	Site, Application, Responsibility, User
**ASO: Security Enable From API	No	Both	Site

Quote Access Security

The following profile options apply to Quote Access Security functionality.

1. ASO: Default Sales Group

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

2. ASO: Default Sales Role

Determines the initial role assignment for the primary salesperson defaulted from **ASO: Default Salesrep**. Valid values are all roles for the resource selected in **ASO: Default Salesrep**, of role type Sales, TeleSales, Field Sales, and Partners Relationship Management.

If this profile option has no specified value, Quoting will use the first role found for the resource.

3. ASO: Default Salesrep

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

If you are integrating with Oracle Territory Manager, the profile option **ASO: Default Salesrep** is mandatory.

4. ASO: Manager Role Access

Determines what level of access a manager has to quotes.

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

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

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

5. ASO: Require Group

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

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

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

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

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

6. ASO: Validate Salesrep

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

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

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

If null, a default value of Yes is assumed.

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

Table A–20 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Sales Group	N/A	Both	Site, Application, Responsibility, User

Table A–20 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Sales Role	N/A	Both	Site, Application, Responsibility, User
ASO: Default Salesrep	N/A	Both	Site, Application, Responsibility, User
ASO: Manager Role Access	Inherit	Both	Site, Application, Responsibility, User
ASO: Require Group	No	Both	Site
ASO: Validate Salesrep	Yes	Both	Site, Application, Responsibility, User

Quote Function Security

The following profile options apply to Quote Function Security functionality.

1. ASO: Automatic Sales Credit Allocation

Determines if and when Quoting calls the sales credit allocation engine to get sales credit receivers and percentages.

If set to **Full**, Quoting calls the sales credit allocation engine upon user request and at order submission to determine sales credit receivers and percentages, for revenue and non-revenue sales credits. If ASO: Automatic Sales Team Assignment is set to Full, Quoting will call Territory Manager to update the sales team at order submission before calling the sales credit allocation engine.

If set to **Partial**, Quoting calls the sales credit allocation engine upon user request only.

If set to **None**, Quoting does not call the sales credit allocation engine to determine credit receivers and percentages.

If null, defaults to **None**.

2. ASO: Automatic Sales Team Assignment

Determines if and when Quoting calls Territory Manager to assign sales teams to quotes.

If set to **None**, Quoting does not call Territory Manager to assign sales teams.

If set to **Partial**, Quoting calls Territory Manager to assign quote sales teams at quote creation, directly, and from templates, and on user request. At quote creation from an opportunity, Quoting will copy the sales team from opportunity to quote, but select the primary sales representative according to logic described in [Chapter 9, "Integrating Oracle Quoting With Oracle Territory Manager"](#). If automatic sales credit allocation is enabled, Quoting calls Territory Manager when the user requests sales credit update.

If set to **Full**, Quoting calls Territory Manager to assign quote sales teams at order submission, in addition to the functionality of the partial setting.

If null, defaults to **None**.

3. ASO: Calculate Projected Commission

Determines if projected commission is available in Quoting.

If set to **Yes**, users can request calculation of their projected quote commissions and view the commission per line and product category.

If set to **No**, users cannot request or view projected commission.

If null, defaults to **No**.

4. ASO: Create New Customer

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

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

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

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

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

5. ASO: Create New Shipping/Billing Customer

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

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

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

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

6. ASO: Enable Submit Button

Determines which users can submit orders.

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

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

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

7. ASO: Enforce Account Relationships

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

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

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

If null, defaults to **No**.

8. ASO: Modify Sales Credits

Determines if the user can enter sales credit information manually.

If set to **Yes**, the user can add or remove sales credit receivers, change credit percentages, and update sales group and credit type for sales reps.

If set to **Partial**, and the user is a manager in the current session's sales group, the user can modify their own sales credit information and that of their subordinates. If the user is not a manager in the current sales group or the OSO/OTS profile option (OSO: Default Sales Group and Role for HTML and OTS: Default User Role and Sales Group for Forms) is not set, the sales credit information will be in a read only format.

If set to **No**, the user cannot modify sales credit information. All visible sales credit information will be in a read only format.

If null, defaults to **Yes**.

9. ASO: OM Access

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

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

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

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

10. ASO: Price List Override

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

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

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

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

11. ASO: Run Sales Credit Update for Quote Lines

Determines whether a call to the sales credit allocation engine updates the entire quote or just the header.

Note: This profile option is ignored if `ASO: Automatic Sales Credit Allocation` is set to **None**.

If set to **Yes**, Quoting calls the engine to update credit information at header level and for all quote lines.

If set to **No**, Quoting calls the sales credit allocation engine to update header-level sales credit information only.

If null, defaults to **No**.

12. ASO: Status Override

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

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

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

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

13. ASO: Update Customer

Allows the user to update existing customer information.

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

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

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

14. ASO: Update Sales Team

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

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

If set to **Partial** a user can:

- Add or remove resources in his/her group to the quote sales team
- Change sales team details for resources in his/her group
- Change the existing Primary Salesperson and/or Primary Sales Group from one sales representative in his/her group to another
- Specify another sales representative in his/her group as the Primary Salesperson

If this profile is set to **Partial** and the user is not a member of any sales groups, Quoting will behave as if the profile option is set to **Yes**. The sales group is determined by

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

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

15. ASO: View Customers Without Accounts

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

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

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

If null, defaults to **Yes**.

16. ASO: View Sales Credits

Determines whose sales credit information a user can view. This profile is only checked if ASO: Modify Sales Credits is set to No or ASO: Modify Sales Credits is set to Partial and the user is not a manager in the current sales group.

If set to **Yes**, the user can view sales credit information for all credit receivers on the quote.

If set to **Partial**, the user can view their own sales credit information on a quote. If the user is a manager in the current session's sales group context, the user can also view their subordinate's sales credits.

If set to **No**, The user can only view their own sales credit information.

If null, defaults to **Yes**.

Table A-21 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Automatic Sales Credit Allocation	None	Both	Site
ASO: Automatic Sales Team Assignment	None	Both	Site
ASO: Calculate Projected Commission	No	Both	Site, Application
ASO: Create New Customer	Yes	Both	Site, Application, Responsibility, User
ASO: Create New Shipping/Billing Customer	Yes	HTML	Site, application, Responsibility, User
ASO: Enable Submit Button	Yes	Both	Site, Application, Responsibility, User
ASO: Enforce Account Relationships	No	Both	Site, Application, Responsibility, User
ASO: Modify Sales Credits	Yes	Both	Site, Application, Responsibility, User

Table A–21 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: OM Access	Full	Forms	Responsibility, User
ASO: Price List Override	Yes	Both	Site, Application, Responsibility, User
ASO: Run Sales Credit Update for Quote Lines	No	Both	Site
ASO: Status Override	No	Both	Site, Application, Responsibility, User
ASO: Update Customer	Yes	HTML	Site, Application, Responsibility, User
ASO: Update Sales Team	Yes	Both	Site, Application, Responsibility, User
ASO: View Customers Without Accounts	Yes	Both	Site, Application, Responsibility, User
ASO: View Sales Credits	Yes	Both	Site, Application, Responsibility, User

New Quote Security

The following profile options apply to New Quote Security functionality:

1. ASO: New Quote Security

Controls the user's ability to create new quotes.

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

If set to **No**, the user can create new standalone quotes. They can copy existing quotes to new quotes and creating quotes from opportunities.

If set to **Sales Team**, the user can only create new quotes for customers if they belong to the customer's sales account team. Please note that users must be set up as valid sales representatives to be added to a sales team

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

Table A–22 Quoting Profile Options for Security

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: New Quote Security	No	Both	Site, Application, Responsibility, User

A.2.20 Oracle Quoting Profile Options for Trade Ins

The following profile option applies to trade-in functionality.

1. ASO: Default Install Base Relationship

Determines the default Installed Base relationship for Relationship Type menu on the Installed Base Relationships page. Forms only.

If set to **Component-Of**, the Relationship Type defaults to Component-of.

If set to **Connected-To**, the Relationship Type defaults to Connected-To.

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

2. ASO: Default IB Search Results

Determines if instances are displayed by default when the IB search form is invoked. Forms only.

If set to **All Instances**, all instances are displayed by default in the search results form.

If set to **None**, no instances are displayed by default and you must conduct a search in order to view any results.

If null, defaults to **None**

3. ASO: Display Installed Base Attributes

Determines whether or not attributes are displayed in the Installed Base search results for trade-ins. Forms only.

If set to **Yes**, attributes are displayed in the search results.

If set to **No**, attributes are not displayed in the search results.

If null, defaults to **No**.

4. ASO: Max Number of IB Search Results

Determines the number of instances that can be displayed at once in the component/connection details. Forms only.

If null, defaults to **100**.

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

Table A-23 Oracle Quoting Profile Options for Publishing

Profile Option	Default Value	HTML or Forms UI	Application Level
ASO: Default Install Base Relationship	Component -Of	Forms	Site, Application
ASO: Default IB Search Results	None	Forms	Site, Application, Responsibility, User
ASO: Display Installed Base Attributes	No	Forms	Site
ASO: Max Number of IB Search Results	100	Forms	Site

A.2.21 Oracle Quoting Profile Options for Web Publishing

The following profile option applies to the web publishing functionality.

1. ASO: Enable Web Publishing

Enables web publishing functionality to Oracle iStore.

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

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

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

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

Table A–24 Oracle Quoting Profile Options for Publishing

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

A.3 Oracle CRM Foundation Profile Options

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

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

Table A–25 JTT Profile Options for Quoting

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

A.4 Oracle Sales Contracts Profile Options

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

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

Table A–26 Sales Contracts Profile Options for Quoting

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
OKC: Enable Sales Contracts	Determines if Contracts integration with Quoting is enabled.	No	Both	Site, Application

A.5 Oracle Order Management Profile Options

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

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

Table A–27 Oracle Order Management Profile Options

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

A.6 Oracle Pricing Profile Options

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

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

Table A-28 Pricing Profile Options for Quoting

Profile Option	Description	Default Value	HTML or Forms UI	Application Level
QP: Multi-Currency Installed	Determines if Quoting displays both price lists with the selected currency as the base currency and price lists where there is a conversion list for the selected currency.	No	Both	Site
QP: Multi-Currency Usages	Determines if multi-currency price lists are used in calls to Pricing.	No	Both	Application
QP: Verify GSA Violations	Indicates whether the pricing calculation engine should test for GSA violations. If set to Yes , Pricing tests for GSA violations. If set to No , Pricing does not check for GSA violations. Mandatory if ASO: GSA Pricing is set to Error or Warning.	No	Both	Site

A.7 Oracle Field Sales Profile Options

If Quoting - HTML is integrated with Oracle Field Sales, specific Oracle Field Sales profile options must be set up during Oracle Quoting implementation. For more

information on Oracle Field Sales profile options, refer to the *Oracle Field Sales Implementation Guide*.

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

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

Table A-29 OSO Profile Options for Quoting

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

A.8 Oracle TeleSales Profile Options

If Quoting - Forms is integrated with Oracle TeleSales, specific Oracle TeleSales profile options must be set during Oracle Quoting implementation.

Note: If you are using a pre-11.5.9 version of OTS, use the profile option **OTS: Default User Role and Sales Group**. If you are using version 11.5.9 or later, use the profile options **OTS: Default User Role** and **OTS: Default User Sales Group**.

For more information on Oracle TeleSales profile options, refer to the *Oracle TeleSales Implementation Guide*.

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

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

Table A–30 TeleSales Profile Options for Quoting

Profile Option	Description	Default Value	Application Level
**OTS: Default User Role and Sales Group	<p>NOTE: This profile is only used if you are using OTS version 11.5.8 or earlier.</p> <p>A value for this profile option is mandatory if Quoting is accessed through Oracle TeleSales.</p> <p>If automatic sales team assignment and automatic sales credit allocation are implemented, and the quote creator is defaulted into the sales team at quote creation instead of being assigned by Territory Manager, the quote creator's role will be defaulted as follows:</p> <ul style="list-style-type: none"> ▪ OTS: Default User Role ▪ First role found ▪ No role defaulting 	N/A	User
OTS: Default User Role	<p>NOTE: This profile is only used if you are using OTS version 11.5.9 or later.</p>	N/A	Site, Application, Responsibility, User
OTS: Default User Sales Group	<p>NOTE: This profile is only used if you are using OTS version 11.5.9 or later.</p>	N/A	Site, Application, Responsibility, User

A.9 Multi Organization (MO) Profile Options

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

A.10 Oracle iStore Profile Options

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

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

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

A.11 Oracle Self Service Web Applications Profile Options

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

Set **ICX: Report Server** to the key map value located in the file CGIcmd.dat. See [Section 4.18, "Setting Up the Print Quote Functionality"](#) for more information.

Seeded Roles and Responsibilities

This appendix lists the Oracle Forms, Oracle CRM Applications, and Oracle Quoting Customer UI users and responsibilities necessary to implement Oracle Quoting.

You can create new users and responsibilities, and assign responsibilities as needed. See *Oracle Applications System Administrator's Guide*, *Oracle CRM Technology Foundation Implementation Guide*, and *Oracle CRM Technology Foundation Concepts and Procedures* for more information.

Topics include:

- [Section B.1, "Oracle Forms Responsibilities"](#)
- [Section B.2, "Oracle CRM Applications Responsibilities"](#)
- [Section B.3, "Oracle Quoting UI Responsibilities"](#)

B.1 Oracle Forms Responsibilities

Access Oracle Forms by navigating to:

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

and clicking **Apps Logon Links** > **VIS Logon through the Forms cartridge**. Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle Quoting in Oracle Forms.

Table B-1 Oracle Forms Responsibilities

Responsibility	Tasks
Application Developer	Determine which links are available in the HTML sidebar menu. See Section 4.10, "Displaying Sidebar Menu Options (HTML)" for details. Set up descriptive flexfields to appear on quote pages. See Section 4.30, "Defining Descriptive Flexfield Information" for details.
Application Developer Common Modules	Customize the HTML UI. See Section 4.11, "Customizing the Lines Pages (HTML)" or Section 4.13, "Customizing the Overview Page (HTML)" for details.
iStore Concurrent Programs Responsibility	Run the concurrent programs iStore Search Insert when setting up interMedia product searches. See Section 4.20, "Enabling interMedia Search" for details.
Oracle Pricing Manager	Set up Oracle Pricing. See Section 2.1.4, "Setting up Oracle Advanced Pricing" for details.
Order Management Super User	Set up Oracle Order Management. See Section 2.1.7, "Setting up Oracle Order Management" for details. Set up credit check rules. See Section 4.26, "Setting Up Credit Check Functionality" for details.
Receivables Manager	Set up Oracle Receivables. See Section 2.1.1, "Setting up Oracle Receivables" for details.
System Administrator	Assign responsibilities to users. See Section 4.4, "Assigning a Seeded Oracle Quoting Responsibility to a User" for details. Set system profile options. See Section 4.2, "Setting System Profile Options" for details.

B.2 Oracle CRM Applications Responsibilities

Access the Oracle CRM Applications login page at:

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

Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the user names and responsibilities necessary to perform setup and administrative tasks for Oracle Quoting in Oracle CRM Applications.

Table B–2 Oracle CRM Applications Users and Responsibilities

User	Responsibility	Tasks
SYSADMIN	CRM HTML Administration Logging in with this responsibility launches the Oracle CRM System Administrator Console.	Set up branding for HTML Quoting. See Section 4.14, "Setting Up Branding (HTML UI)" for details.

B.3 Oracle Quoting UI Responsibilities

Table B–3 Oracle Quoting Customer UI Users and Responsibilities

Responsibility	Tasks
Oracle HTML Quoting Sales Agent	Access the HTML UI of Quoting.
Quoting Sales Agent	Access Forms UI of Quoting.
Quoting Sales Manager	<p>Disable action menu items or buttons in the HTML UI. See Section 4.12, "Disabling Action Menus and Buttons (HTML)" for details.</p> <p>Set up print quote. See Section 4.18, "Setting Up the Print Quote Functionality" for details.</p> <p>Set up sales supplement templates. See Section 4.28, "Setting up Sales Supplement Templates" for details.</p>

Oracle Quoting Security Scenarios

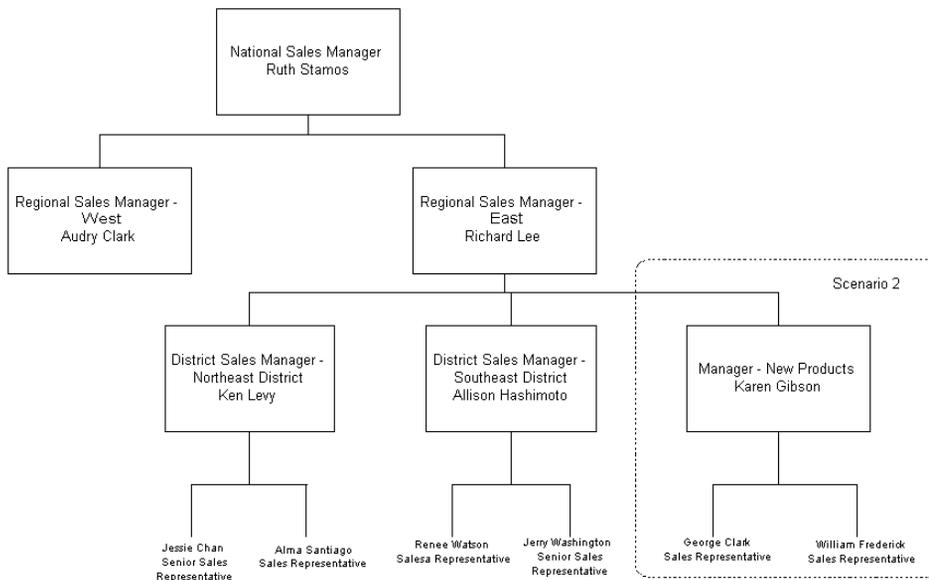
This section contains scenarios demonstrating uses for Oracle Quoting Security.

- [Section C.1, "Scenario 1 — Organization Split Into Regions and Districts"](#)
- [Section C.2.1, "Scenario 2 — New Quote Security"](#)
- [Section C.3, "Scenario 3 — Call Center Environment"](#)
- [Section C.4, "Scenario 4 — Automatic Sales Team Assignment"](#)

C.1 Scenario 1 — Organization Split Into Regions and Districts

A national sales organization headed by Ruth Stamos is split into East and West regions with districts in the Eastern region.

The following diagram shows the hierarchy of the employees at the organization.



The following table lists the roles for the organization and the flags that should be selected for the role during set up.

Table C-1 Roles

Role	Flag
National Sales Manager	Manager
Regional Sales Manager	Manager
District Sales Manager	Manager
Sales Representative	Member
Senior Sales Representative	Member

Setup of this scenario requires the following steps:

1. Create a resource for each person.

The following table lists the resources set up for the organization.

Resource
Ruth Stamos
Audrey Clark
Richard Lee
Ken Levy
Allison Hashimoto
Karen Gibson
Jessie Chan
Alma Santiago
Renee Watson
Jerry Washington
George Clark
William Frederick

2. Create 5 roles.

The following table shows the roles set up for the company and the flags that must be enabled for each role during setup.

Table C-2 Roles

Role Name	Flag Selected
National Sales Manager	Manager
Regional Sales Manager	Manager
District Sales Manager	Manager
Sales Representative	Member
Senior Sales Representative	Member

3. Assign roles to resources.

The following table shows the roles assigned to each resource within the organization.

Table C-3 Assign Roles to Resources

Resource	Role
Ruth Stamos	National Sales Manager
Audrey Clark	Regional Sales Manager
Richard Lee	Regional Sales Manager
Ken Levy	District Sales Manager
Allison Hashimoto	District Sales Manager
Karen Gibson	District Sales Manager
Jessie Chan	Senior Sales Representative
Alma Santiago	Sales Representative
Renee Watson	Sales Representative
Jerry Washington	Senior Sales Representative
George Clark	Sales Representative
William Frederick	Senior Sales Representative

4. Create groups and parent/child relationships.

The following table lists the parent/child relationships for the groups for the organization.

Group	Parent of:
National Sales	Western Region, Eastern Region
Western Region	-
Eastern Region	Northeast District, Southeast District, New Products
Northeast District	-
Southeast District	-
New Products	-

5. Assign resources to groups.

The following table lists the resources assigned to each group.

Resource	Role	Group
Ruth Stamos	National Sales Manager	National Sales
Audrey Clark	Regional Sales Manager	Western Region
Richard Lee	Regional Sales Manager	Eastern Region
Ken Levy	District Sales Manager	Northeast District
Allison Hashimoto	District Sales Manager	Southeast District
Karen Gibson	District Sales Manager	New Products
Jessie Chan	Senior Sales Representative	Northeast District
Alma Santiago	Sales Representative	Northeast District
Renee Watson	Sales Representative	Southeast District
Jerry Washington	Senior Sales Representative	Southeast District
George Clark	Sales Representative	New Products
William Frederick	Senior Sales Representative	New Products

6. Check hierarchy.

Refer to the *Oracle CRM Application Foundation Concepts and Procedures* for information on accessing Resource Manager and group hierarchies.

- a. Select **Ruth Stamos** from the Name LOV.
- b. Select **A11** from the View By LOV.

The Members section should show all resources in the organization.

- c. Select **Direct Reports** from the View By LOV.

The Members section should only show Richard Lee and Audrey Clark.

Repeat this procedure for all resources.

C.2 Scenario 2 - Security Based on Profile Options

Senior Sales Representatives determine who works on each sale and can also change price lists and discounts. Managers can edit their subordinates' quotes.

Setup of this scenario requires the following steps:

1. Set profile options for users.

The following table lists the profile option settings for each resource.

Resource	Role	Profile Option
Ruth Stamos	National Sales Manager	Set ASO: Manager Role Access to Update
Audrey Clark	Regional Sales Manager	Set ASO: Manager Role Access to Update.
Richard Lee	Regional Sales Manager	Set ASO: Manager Role Access to Update.
Ken Levy	District Sales Manager	Set ASO: Manager Role Access to Update.
Allison Hashimoto	District Sales Manager	Set ASO: Manager Role Access to Update.
Karen Gibson	District Sales Manager	Set ASO: Manager Role Access to Update.
Jessie Chan	Senior Sales Representative	Set ASO: Price List Override to Yes. Set ASO: Discounting Privilege to Full.
Alma Santiago	Sales Representative	Set ASO: Price List Override to No. Set ASO: Discounting Privilege to None.
Renee Watson	Sales Representative	Set ASO: Price List Override to No. Set ASO: Discounting Privilege to None.
Jerry Washington	Senior Sales Representative	Set ASO: Price List Override to Yes. Set ASO: Discounting Privilege to Full.
George Clark	Sales Representative	Set ASO: Price List Override to No. Set ASO: Discounting Privilege to None.

Resource	Role	Profile Option
William Frederick	Senior Sales Representative	Set ASO: Price List Override to Yes . Set ASO: Discounting Privilege to Full .

C.2.1 Scenario 2 — New Quote Security

The East Region of the national sales organization has a group dedicated to working across districts selling new products to existing customers. This group should have the ability to create new quotes for all customers, whereas the Southeast and Northeast district teams should only have access to quotes for which they are on the sales team.

The profile option **ASO: New Quote Security** should be set at the user level.

Steps

1. For users on the Northeast and Southeast teams, set the profile to **Sales Team**.
2. For employees on the new product team, set the profile to **Yes**.

The following table lists the resources, their associated roles, and the profile option settings.

Resource	Role	Profile Option
Jessie Chan	Senior Sales Representative	Set ASO: New Quote Security to Sales Team .
Alma Santiago	Sales Representative	Set ASO: New Quote Security to Sales Team .
Renee Watson	Sales Representative	Set ASO: New Quote Security to Sales Team .
Jerry Washington	Senior Sales Representative	Set ASO: New Quote Security to Sales Team .
George Clark	Sales Representative	Set ASO: New Quote Security to None .
William Frederick	Senior Sales Representative	Set ASO: New Quote Security to None .

C.3 Scenario 3 — Call Center Environment

The organization has a call center that handles new and existing quotes. Sales representatives are not dedicated to particular customers or quotes.

The profile **ASO: Security Enable from API** should be set to **No**. Therefore, no security check is performed. This speeds up performance.

C.4 Scenario 4 — Automatic Sales Team Assignment

The organization wants to automatically assign their sales teams based on territories. They want Quoting to automatically call Territory Manager to assign sales teams at quote creation, directly, and from templates. Additionally, they want to be able to call Territory Manager on user request.

The profile option **ASO: Automatic Sales Team Assignment** must be set to **Partial**.

Oracle Quoting Seeded Caches

D.1 Oracle Quoting Seeded Caches

The following table displays Oracle Quoting's seeded caches.

Table D-1 Seeded Caches for Oracle Quoting

Cache	Description
QOT_ATP_STATUS_CACHE	Stores information about ATP statuses, including status code and meaning.
QOT_BOM_ITEM_TYPE_CACHE	Stores information about BOM item types, including BOM item type code and meaning.
QOT_CREDIT_CARD_TYPE_CACHE	Stores information about credit card types, including credit card type and name.
QOT_CONTRACT_PRINT_TEMPL_CACHE	Stores information about contract print templates.
QOT_CURRENCY_CACHE	Stores information about currencies, including currency code, meaning, symbol, and price list IDs.
QOT_IB_REL_TYPE_CACHE	Stores information about Install Base relationship types, including relationship type code and meaning.
QOT_ITEM_CTG_LIST_CACHE	Stores information about the list of item categories available for a particular category set.
QOT_ITEM_TYPE_CACHE	Stores information about item types, including item type code and meaning.
QOT_LINE_TYPE_LIST_CACHE	Stores information regarding the list of lines types available, based on operating unit, order type, and line category.

Table D-1 Seeded Caches for Oracle Quoting

Cache	Description
QOT_LOOKUP_VALUES_CACHE	Stores information about lookup types and the corresponding lookup values.
QOT_MKTG_SRC_TYPE_CACHE	Stores information about marketing source types, including source type code and name.,
QOT_MODIFIER_LEVEL_CACHE	Stores information about price modifier levels, including code and name.
QOT_MODIFIER_LINE_TYPE_CACHE	Store information about price modifier line types, including code and name,
QOT_OU_CACHE	Stores information about operating units, including operating unit ID and default territory code.
QOT_PAYMENT_METHOD_CACHE	Stores information about payment methods, including payment method code and meaning.
QOT_PAYMENT_TERM_CACHE	Stores information about payment terms, including payment term ID and name.
QOT_PQUOTE_OUTPUT_FMT_CACHE	Stores information about print quote formats, including code and name.
QOT_PQUOTE_TEMPLATE_CACHE	Stores information about print quote templates, including code and name.
QOT_PRICE_LIST_CACHE	Stores information about price lists, including price list ID, name, and currency code.
QOT_QUOTE_STATUS_CACHE	Stores information about quote statuses.
QOT_RELATIONSHIP_TYPE_CACHE	Stores information about relationship types, including relationship type code and meaning.
QOT_RESOURCE_CTG_CACHE	Stores information about resource categories, including resource category code and meaning.
QOT_RESOURCE_GROUP_CACHE	Stores information about resource groups, including resource group ID and name.
QOT_SALESUPP_COMP_CACHE	Stores information about sales supplement components, including component ID, name, instruction, description, component type, response type, and mandatory flag.
QOT_SALESUPP_RESP_CACHE	Stores information about sales supplement responses, including response ID and name.

Table D–1 Seeded Caches for Oracle Quoting

Cache	Description
QOT_SALESUPP_SECT_CACHE	Stores information about sales supplement sections, including section ID and name.
QOT_SALESUPP_TEMPL_CACHE	Stores information about sales supplement templates, including template ID and name.
QOT_SALES_CHANNEL_CACHE	Stores information about sales channels, including sales channel code and meaning.
QOT_SALES_CREDIT_TYPE_CACHE	Stores information about sales credit types, including sales credit type ID, name, and quota flag.
QOT_SHIPPING_METHOD_CACHE	Stores information about shipping methods, including shipping method code and name.
QOT_TAX_CACHE	Stores tax information, including tax code and printed tax meaning.
QOT_TAX_EXEMPT_REASON_CACHE	Stores information about tax exempt reasons, including tax exempt reason code and meaning.
QOT_TAX_EXEMPT_STATUS_CACHE	Stores information about tax exempt statuses, including tax exempt status code and meaning.
QOT_TERRITORY_CACHE	Stores information about territories, including territory code and name.
QOT_TRANSACTION_TYPE_CACHE	Stores information about transaction types, including transaction type ID, name, code, and price list ID.
QOT_TRXN_LINE_CTG_CODE	Stores information about transaction line categories, including line category code and meaning.
QOT_UOM_CACHE	Stores information about units of measure, including UOM code and name.
QOT_YES_NO_CACHE	Stores information about yes/no lookups, including code and meaning.

Seeded Lookup Types

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

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

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

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

Table B-1 lists descriptions and access levels for seeded Oracle Quoting Lookup Types (QuickCodes).

Table E-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_ACCOUNT_CREATION	Lookup for profile option ASO: Auto Account Creation .	System
ASO_APPROVAL_INSTANCE_STATUS	Status of an approval instance	System
ASO_APPROVER_STATUS	Status of an approver response	System
ASO_BATCH_PROCESSING_PHASES	Lists the batch processing phases.	System

Table E-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_CONFIGURATION_STATUS	Lists the product configuration statuses.	System
ASO_CUSTOMER_TYPE	Defines customer type for sold-to, bill-to, and ship-to customers	System
ASO_DEFAULT_ORDER_STATE	Default order state when quote passes to Oracle Order Management. Seeded values are Entered and Booked . Each triggers different Oracle Order Management validation.	System
ASO_DISCOUNTING_PRIVILEGE	Discounting privilege for manual discounting	System
ASO_ER_REFRESH_MODE	Quoting mode in which fact tables are refreshed	System
ASO_FORMS_ACTION	Lists the values for the Actions LOV in the Quoting form.	System
ASO_GSA_PRICING	Determines level of error message for GSA violation	System
ASO_IB_ACTION_TYPES	Types of actions that appear on the Search and Select: Installed Base Product page of the HTML UI.	User
ASO_IB_RELATIONSHIP_TYPES	Types of relationships that appear on the Installed Base Relationships page of the HTML UI.	User
ASO_ITEM_TYPE	Item types for items which are added to the quote	System
ASO_LINE_ACTION	Type of line actions that appear on the Lines page of the HTML UI.	User
ASO_LINE_ITEM_ACTIONS	Type of actions available in the Actions menu on the Lines page. HTML UI	User
ASO_MODIFY_SALES_CREDITS	Provides values for the profile option ASO: Modify Sales Credits.	System
ASO_OM_ACCESS_PRIVILEGE	Determines mode of access to the Oracle Order Management form via the Customer History form	System

Table E-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_ORDER_FEEDBACK_CRM_APPS	CRM applications registered for order feedback. All applications listed are informed of any changes to an order in Oracle Order Management.	User
ASO_PAYMENT_TYPE	Payment types available to users	System
*ASO_PQUOTE_OUTPUT_FMT	List of report formats in which a quote can be printed.	User
*ASO_PQUOTE_TEMPLATES	List of report templates to print a report.	User
ASO_PQUOTE_XSL_FMT	List of XML Publisher formats in which a quote can be printed. This lookup is valid only if ASO: Default Print Method is set to <i>XML Publisher</i> .	System
ASO_PRICE_TAX_COMPUTE_OPTIONS	Lists the pricing and tax computation options.	System
ASO_PRICE_TAX_STATUS_INDICATOR	Lists the pricing and tax status indicators.	System
ASO_PRODUCT_SOURCE	Types of product sources available on the Search and Select Product page (HTML UI).	User
ASO_QUOTE_ACTION	Types of actions available on the Overview page of HTML UI.	User
ASO_QUOTE_SECURITY	Provides values for the profile ASO: New Quote Security . The lookup codes here should not be changed.	System
ASO_QUOTE_SOURCE	Quote source	System
ASO_RESERVATION_TYPE	Determines values for level at which Reservation needs to be done	System
ASO_SAVED_SEARCH	Lists the saved searches in the HTML UI.	System
ASO_SECURITY_MGR_ROLE_ACCESS	Values for security profile ASO: Manager Role Access	System

Table E-1 Oracle Quoting Lookup Types

Lookup Type	Description	Access Level
ASO_SERVICE_TYPE	Service reference type code. A service must always be linked to an inventory item or an item in the customer install base. This list of values specifies where the item is. Seeded values include: Quote, Order, and Customer Product.	System
ASO_SERVICE_VALIDATION_TYPE	Validation used for ordering services on a quote.	System
ASO_SUP_COMPONENT_TYPE	Sales supplement data component type	System
ASO_SUP_PRESENTATION_STYLE	Sales supplement data presentation style	System
ASO_SUP_RESPONSE_TYPE	Sales supplement response type	System
ASO_SUP_SECTION_COMPONENT_TYPE	Sales supplement section component type	System
ASO_SUP_TEMPLATE_CONTEXT	Sales supplement application values.	Extensible
ASO_SUP_TEMPLATE_QUOTE	Used to define levels for the sales supplement templates. Seeded values are ALL, HEADER, LINE.	Extensible
ASO_TEAM_ASSIGN	Provides list of values for the profile option ASO: Automatic Sales Team Assignment	System
ASO_TSN_TYPE	Determines whether the TSN type is ship method, payment term or freight term.	System
ASO_VIEW_SALES_CREDITS	Provides the values for the profile option ASO: View Sales Credits.	System+

The following table lists the obsolete Oracle Quoting Lookup Types.

Table E-2 Obsolete Oracle Quoting Lookup Types

Lookup Type	Description
ASO_CONTACT_PROFILE_TYPE	Profile type of a customer contact

Table E-2 *Obsolete Oracle Quoting Lookup Types*

Lookup Type	Description
ASO_ORDER_LINE_STATUESSES	Status of an order line
ASO_ORDER_STATUSES	Order status
ASO_PARTY_RELATIONSHIP_ TYPE	Type of party relationship
ASO_NON_DEFAULT_ CONTRACT	Approval level for non-default contract options
ASO_QUOTE_RELATED_ OBJECTS	Seeded lookup data required for data migration in Sales
ASO_RETURN_FOR	Reasons for returns
ASO_UNIVERSAL_SEARCH	Types of universal search

Seeded Attributes in Oracle Approvals Management (OAM)

F.1 Commonly Used OAM Seeded Attributes

Table F-1, "OAM Seeded Attributes for Oracle Quoting" displays seeded, commonly used attributes, display level (header or line), attribute description, and attribute type.

Table F-1 OAM Seeded Attributes for Oracle Quoting

Attribute	Level	Description	Attribute Type
Quote Total	Header	Total quote amount. Includes shipping and freight charges and taxes.	Currency
Quote Line Total	Line	Total quote line amount prior to shipping and freight charges and taxes.	Currency
Unit List Price	Line	Unit list price.	Currency
Unit Net Price	Line	Unit net price.	Currency
Manual Adjustment Amount	Line	Sum of the header and line manual adjustment/amounts	Currency
Manual Adjustment Percent	Line	Sum of the header and line manual adjustment percentages.	Number

Table F-1 OAM Seeded Attributes for Oracle Quoting

Attribute	Level	Description	Attribute Type
Quantity	Line	Quantity	Number
Unit of Measure	Line	Unit of measure	String (List of Values, when available)
Pricing Agreement	Header	Pricing agreement	String (List of Values, when available)
Price List	Line	Price list	String (List of Values, when available)
Item Category (Derived from ASO: Default Category Set or if the profile is null, from the Order Management functional area defined in Inventory)	Line	Item category	String (List of Values, when available)
Item Number	Line	Item number	String (List of Values, when available)
Customer Name	Header	Name of the sold-to customer	String (List of Values, when available)
Account Number	Header	Account number of the sold-to customer	String (List of Values, when available)
Credit Update Date	Header	DAte and time of most recent automatic sales credit update	Date
Non-Standard Terms	Header	Clauses that have been newly authored or standard clauses modified from the contract library.	String (List of Values, when available)
Clauses Changes from the Contract Template	Header	Clauses manually added/removed from a Quote or new clauses added to a template after instantiation.	String (List of Values, when available)

F.2 Mandatory Seeded OAM Attributes

OAM requires calling applications to populate specific mandatory attributes. All of these attributes are at the header level. [Table F-2, "OAM Mandatory Seeded Attributes"](#) lists seeded values and attribute types for these mandatory attributes.

Table F-2 OAM Mandatory Seeded Attributes

Attribute	Attribute Type	Value
ALLOW_DELETING_RULE_GENERATED_APPROVERS	Boolean	False
ALLOW_REQUESTOR_APPROVAL	Boolean	True
AT_LEAST_ONE_RULE_MUST_APPLY	Boolean	False
EFFECTIVE_RULE_DATE	Date	The date the quote is submitted for approval.
TRANSACTION_DATE	Date	The date the quote is submitted for approval.
TRANSACTION_GROUP_ID	Number	Null
TRANSACTION_ORG_ID	Number	Org id of the quote
TRANSACTION_SET_OF_BOOKS_ID	Number	Null
TRANSACTION_ID	Number	Quote header id
TRANSACTION_REQUESTOR_PERSON_ID	Number	Person_id/fnd_user id of the requestor

F.3 Non-Mandatory Seeded OAM Attributes

The following seeded OAM attributes are not mandatory, but may be required under certain circumstances. [Table F-3, "Non-mandatory Seeded OAM Attributes"](#) displays the seeded values for Oracle Quoting.

Table F-3 Non-mandatory Seeded OAM Attributes

Attribute	Attribute Type	Value
INCLUDE_ALL_JOB_LEVEL_APPROVERS	Boolean	False
JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID	Number	Null

Category Set Usage in Quoting

This appendix describes the category set usage in Oracle Quoting.

Topics include:

- [Section G.1, "Overview of Category Set Usage"](#)
- [Section G.2, "Category Set Usage in the HTML User Interface"](#)
- [Section G.3, "Category Set Usage in the Forms User Interface"](#)
- [Section G.4, "Other Category Set Usages in Quoting"](#)

G.1 Overview of Category Set Usage

The category set used in Quoting is determined as follows:

- The category set specified in the profile option ASO: Category Set. For more information on the category set profile option, refer to [Appendix A, "Oracle Quoting Profile Options"](#).
- The category set specified in Inventory as the default category set for the functional area *Order Management*.

All references to category set are based on this definition unless otherwise noted.

G.2 Category Set Usage in the HTML User Interface

The following table lists the fields affected by the category set.

Table G–1 HTML Fields Affected by Category Set

Search Context	Description of category set usage
Search for Product in Product Catalog (interMedia and non-interMedia-based searches)	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Search for Trade-in product from the Installed Base	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Reconfiguration from Installed Base	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Specify Service Reference when searching the Installed Base for a Serviceable product	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Specify Service Reference when searching Pending Orders for a Serviceable product	The category set is not used in this search.
Add Related Products	The category set is not used when searching for related products.

G.3 Category Set Usage in the Forms User Interface

The following table lists the fields affected by the category set.

Table G-2 Forms Fields Affected by Category Set

Search Context	Description of category set usage
Search for Product in Product Catalog (interMedia-based search)	The list of products is filtered based on the category set.
Search for Product in Product Catalog (non-interMedia-based search)	The category set is not used for this search.
Search for Trade-in product from the Installed Base	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Reconfiguration from Installed Base	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Specify Service Reference when searching the Installed Base for a Serviceable product	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Specify Service Reference when searching Pending Orders for a Serviceable product	<ul style="list-style-type: none"> ■ The product category LOV shows all categories belonging to the category set. ■ The product category LOV only shows categories (for the category set) that contain at least one product. ■ The list of products is filtered based on the category set.
Add Related Products	The category set is not used when searching for related products.

Table G–2 Forms Fields Affected by Category Set

Search Context	Description of category set usage
Product LOV in the Quote Search form	The product LOV is not filtered based on the category set

G.4 Other Category Set Usages in Quoting

Category set is also used in Quoting for functionality that is unrelated to searching. The following table displays the category set usage in other areas of Quoting.

Table G–3 Category Set Usage

Search Context	Description of category set usage
Print Quote - Subtotal by product category	The subtotal by product category is based on categories that belong to the category set.
Projected Commission - subtotal by product category	The subtotal by product category is based on categories that belong to the category set.
Territory Management setup	The categories used for setup are based on the product category.
Sales Credit Allocation Setup	The product LOV in the setup screen is based on the category set.
Pricing Integration	Advanced Pricing uses the default category set for the Order Management functional area for all references to the product category. It does not use the profile option ASO: Category Set.
Quote Approvals setup	The seeded <i>product category</i> attribute is based on the category set.

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