

Oracle® Quoting

User Guide

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Glossary

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Preface

Welcome to the *Oracle Quoting User 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 User Guide* contains the information you need to understand and use Oracle Quoting. This guide contains four chapters:

- Chapter 1 provides overviews of the application and its components, and explanations of key concepts, features, functions, and the application's relationships to other Oracle or third-party applications.

- Chapter 2 lists the procedures needed to create quotes (HTML)
- Chapter 3 includes information on creating, modifying, and deleting templates (HTML)
- Chapter 4 provides procedures for performing searches (HTML)
- Chapter 5 provides information on performing credit checks (HTML)
- Chapter 6 includes information on pricing (HTML)
- Chapter 7 provides information on customers and relationships (HTML)
- Chapter 8 contains information on entering and modifying address and payment information (HTML)
- Chapter 9 contains information on modifying quotes (HTML)
- Chapter 10 includes procedural information for copying quotes (HTML)
- Chapter 11 provides information on creating proposals
- Chapter 12 describes the concepts and procedures associated with approvals (HTML)
- Chapter 13 contains information on Sales Contracts integration (HTML)
- Chapter 14 lists the steps necessary to enable and use security (HTML)
- Chapter 15 contains information on assigning sales teams, allocating sales credits, and viewing projected commission.
- Chapter 16 provides information on creating notes, tasks, and attachments (HTML)
- Chapter 17 contains information on publishing and printing (HTML)
- Chapter 18 contains information on placing orders from quotes (HTML)
- Chapter 19 provides information on using folder functionality (Forms)
- Chapter 20 lists the procedures needed to create quotes (Forms)
- Chapter 21 contains information on quote templates (Forms)
- Chapter 22 provides procedures for performing searches (Forms)
- Chapter 23 provides information and procedures for performing credit checks (Forms)
- Chapter 24 includes information on pricing (Forms)
- Chapter 25 provides information on customers and relationships (Forms)

- Chapter 26 contains information on entering and modifying address and payment information (Forms)
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- Chapter 30 contains information on Sales Contracts integration (Forms)
- Chapter 31 lists the steps necessary to enable and use security (Forms)
- Chapter 32 contains information on assigning sales teams, allocating sales credits, and viewing projected commission.
- Chapter 33 provides information on creating notes and attachments (Forms)
- Chapter 34 contains information on publishing and printing (Forms)
- Chapter 35 contains information on placing orders from quotes (Forms)

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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.
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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 Implementation Guide

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

"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.

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.

OracleMetaLink

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

Part I

Introduction and Overview

This part contains the following chapter:

- [Chapter 1, "Introduction to Oracle Quoting"](#)

Introduction to Oracle Quoting

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

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

1.1 Overview

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

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

Oracle Quoting is available with HTML and Forms user interfaces. Oracle Quoting-HTML integrates with Sales Online and Oracle Quoting-Forms with Oracle TeleSales. Quoting may be used standalone as well.

1.2 Oracle Quoting Key Features

Oracle Quoting allows you to:

- Allow contract terms to be displayed with and printed on the quote through enhanced integration with Oracle Sales Contracts
- Administer Sales Contract Terms and Conditions directly on a Quote
- Add configured products to quote (including guided selling)
- Add service products to quote
- Allocate sales credits
- Authorize credit card payment
- Check availability of products
- Convert quotes to orders
- Comply with Latin American Tax Requirements
- Control quote access and update with quote security
- Copy existing quotes
- 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
- Modify the Base UOM
- 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

1.3 Oracle Quoting Integrations

Oracle Quoting integrates with the following modules:

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

- [Section 1.3.8, "Oracle Advanced Planning"](#)
- [Section 1.3.9, "Oracle Configurator"](#)
- [Section 1.3.10, "Oracle Incentive Compensation"](#)
- [Section 1.3.11, "Oracle Territory Manager"](#)
- [Section 1.3.12, "Oracle Sales Contracts"](#)

1.3.1 Oracle Receivables

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

1.3.2 Oracle Advanced Pricing

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

1.3.3 Oracle Bill of Materials

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

1.3.4 Oracle General Ledger

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

1.3.5 Oracle Inventory

Provides Availability to Promise (ATP) and reservation functions, and all product information from Inventory. Refer to the *Oracle Inventory User's Guide* for complete information

1.3.6 Oracle Order Management

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

1.3.7 Oracle Approvals Management

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

1.3.8 Oracle Advanced Planning

Oracle Quoting uses Advanced Planning and Scheduling for Global ATP Check. Refer to the *Oracle Global Order Promising Implementation and User's Guide* and the *Oracle Advanced Planning Implementation and User's Guide* for more information.

1.3.9 Oracle Configurator

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

1.3.10 Oracle Incentive Compensation

Oracle Quoting uses Oracle Incentive Compensation to perform automatic sales credit allocations and calculate projected commissions. Refer to the *Oracle Incentive Compensation User Guide* and *Oracle Incentive Compensation Implementation Guide* for more information.

1.3.11 Oracle Territory Manager

Oracle Quoting uses Oracle Territory Manager to automatically assign sales teams to quotes. Refer to the *Oracle Territory Manager User Guide* and *Oracle Territory Manager Implementation Guide* for more information.

1.3.12 Oracle Sales Contracts

Oracle Quoting integrates with Oracle Sales Contracts to provide contract terms on quotes. Refer to the *Oracle Contracts Implementation and Administration Guide*.

1.4 What's New

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 MetaLink for relevant product patches and documentation.

The following functionality is new in this release:

- Add quote templates to existing quotes
- Ability to change Currency after quote creation
- Ability to change Order Type after quote creation
- Ability to use Multi-currency Price Lists
- Allow contract terms to be added, negotiated, and displayed with and printed on the quote through enhanced integration with Sales Contracts
- Automatic Sales Credit Allocation
- Automatic Sales Team Assignment
- Display Tax Rate on Quote Print Out
- Projected Commission
- Sales group based quote access
- Sales Supplement on Quote Print Out
- Support for line level sales supplements
- Support for Promotional Goods (Buy One, Get One Free)
- Update Line Level Pricing Agreements

HTML UI Only

- Link to Line Level Flexfields
- New navigation to Header Level Flexfields
- Shipping Details Exposed

Forms UI Only

- Header and Line Level Charges
- Quote Templates
- Sales Supplement - Header and Line Level
- Additional information in the Pricing Adjustment Form
- Trade-In from Installed Base

1.5 Accessing Oracle Quoting HTML Interface

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

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

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

You can designate a different Saved Search as your Quotes page default listing. For more information see [Section 4.4, "Saved Searches"](#).

Prerequisites

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

Steps

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

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

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

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

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

1.6 Accessing the Oracle Quoting Forms User Interface

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

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

Login

Log into Oracle Applications.

Responsibility

Quoting Sales Agent or Quoting Sales Manager

Prerequisites

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

Steps

1. In the Navigator, choose **Quoting**.
The Quoting form displays.

1.7 Summary of Oracle Quoting Tasks

Use Oracle Quoting to perform the following types of tasks:

HTML

- [Chapter 2, "Creating Quotes"](#)
- [Chapter 3, "Creating and Modifying Templates"](#)
- [Chapter 4, "Searching"](#)
- [Chapter 5, "Credit Checks"](#)
- [Chapter 6, "Pricing Products and Quotes"](#)
- [Chapter 7, "Customers and Relationships"](#)
- [Chapter 8, "Entering Address and Payment Information"](#)

- Chapter 9, "Modifying Quotes"
- Chapter 10, "Copying Quotes"
- Chapter 11, "Creating Proposals from Quotes"
- Chapter 12, "Initiating Approvals"
- Chapter 13, "Negotiating Contract Terms on Quotes"
- Chapter 14, "Enabling Quoting Security"
- Chapter 15, "Assigning Sales Teams and Allocating Sales Credits"
- Chapter 16, "Notes, Tasks, and Attachments"
- Chapter 17, "Publishing and Printing"
- Chapter 18, "Placing Orders"

Forms

- Chapter 19, "Using Folder Functionality"
- Chapter 20, "Creating Quotes"
- Chapter 21, "Using Templates"
- Chapter 22, "Searching"
- Chapter 23, "Credit Checks"
- Chapter 24, "Pricing Products and Quotes"
- Chapter 25, "Customers and Relationships"
- Chapter 26, "Entering Address and Payment Information"
- Chapter 27, "Modifying Quotes"
- Chapter 28, "Copying Quotes"
- Chapter 29, "Initiating Approvals"
- Chapter 30, "Negotiating Contract Terms on Quotes"
- Chapter 31, "Enabling Quoting Security"
- Chapter 32, "Assigning Sales Teams and Allocating Sales Credits"
- Chapter 33, "Notes and Attachments"
- Chapter 34, "Publishing and Printing"

- [Chapter 35, "Placing Orders"](#)

Part II

User Procedures - HTML

This part contains the following chapters:

- Chapter 2, "Creating Quotes"
- Chapter 3, "Creating and Modifying Templates"
- Chapter 4, "Searching"
- Chapter 5, "Credit Checks"
- Chapter 6, "Pricing Products and Quotes"
- Chapter 7, "Customers and Relationships"
- Chapter 8, "Entering Address and Payment Information"
- Chapter 9, "Modifying Quotes"
- Chapter 10, "Copying Quotes"
- Chapter 11, "Creating Proposals from Quotes"
- Chapter 12, "Initiating Approvals"
- Chapter 13, "Negotiating Contract Terms on Quotes"
- Chapter 14, "Enabling Quoting Security"
- Chapter 15, "Assigning Sales Teams and Allocating Sales Credits"
- Chapter 16, "Notes, Tasks, and Attachments"
- Chapter 17, "Publishing and Printing"
- Chapter 18, "Placing Orders"

Creating Quotes

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

- [Section 2.1, "Overview of Creating Quotes"](#)
- [Section 2.2, "Creating a Quote"](#)
- [Section 2.3, "Creating a Quote From an Opportunity"](#)
- [Section 2.4, "Creating a Quote From a Template"](#)
- [Section 2.5, "Creating a New Version of a Quote"](#)

2.1 Overview of Creating Quotes

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

When you create a quote, you must specify the following information:

- Primary Salesperson
- Quote Name
- Customer
- Expiration Date
- Currency
- Order Type
- Status

A record for the new quote is created when you enter this information and select **Apply**.

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

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

2.1.1 Understanding Quotes

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

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

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

2.1.2 Quote Status

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

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

- Decide which statuses allow modification of the quote and which are read-only
- Add statuses
- Change status names
- Define, by application, a default quote status on a new quote or version
- Decide the statuses to which a given status can change

2.1.2.1 Pre-Defined Quote Statuses

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

Table 2–1 Predefined Quote Statuses

Quote Status	Description	Read-only
Approval Canceled	Sales representative canceled the approval process.	No
Approval Pending	Quote is pending approval.	Yes
Approval Rejected	Approval was rejected by the approvers.	No
Approved	Approved by the approvers.	Yes
Draft	Initial status.	No
Inactive	No more activity allowed.	Yes
Order Submitted	Order submitted to Oracle Order Management.	Yes
StoreDraft	For iStore internal use only.	No

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

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

Note: The statuses *Ordered*, *Entered*, *Contract Canceled*, *Contract Pending*, and *Contract Required* 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 will you have the ability to enable them.

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

- Modify tasks and notes.

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

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

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

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

2.1.2.2 Rules for Quote Status Changes

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

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

Table 2–2 Seeded Quote Status Transitions

From	To	User Maintainable
Approval Pending	Approved	No
Approval Pending	Approval Canceled	No
Approval Pending	Approval Rejected	No
StoreDraft	Draft	No
StoreDraft	Inactive	No
StoreDraft	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.

2.2 Creating a Quote

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

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

To create a quote in the HTML UI:

Prerequisites

The profile option *ASO: New Quote Security* must be set to *No* or *Sales Team* at the appropriate level to create new, standalone quotes. If set to *Yes*, you can still create quotes from opportunities. See [Chapter 14, "Enabling Quoting Security"](#), for more information.

Navigation

Quoting > Create Quote

Field Behavior

- Quote Number

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

- Customer Name

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

If you select a customer with an address, the address field is automatically populated. See [Section 8.2, "Address Defaulting"](#) for more information.

The contact field is automatically populated, if a contact is displayed in the customer search. If there is no contact, the field is left blank.

The account number field is automatically populated based on the selection in the search results. If the customer has no accounts, one will be created based on the setting of *ASO: Auto Account Creation*. See [Section 7.1.2, "Creation of Accounts"](#) for more information.

- Expiration Date

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

- Primary Salesperson

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

If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*, this field is read-only without defaulted values.

- Primary Sales Group

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

If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*, this field is read-only without defaulted values.

- Source

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

- Agreement

The Agreement menu lists agreements that are valid for the Quote To customer and customers related to the Quote-To customer, and agreements that apply to all customers.

- Price list

Lists all available price lists. The value in this field defaults from:

- Agreement
- Customer
- Order Type

Appears as read-only if *ASO: Price List Override* is set to *No*.

- Contract Template

A default contract template is defaulted from the profile option *ASO: Default Contract Template*. This field is only enabled if the profile *OKC: Enable Sales Contracts* is set to *Yes*.

- Flexfields

Flexfields are displayed if *ASO: Display Header Flexfields with Quote Header in HTML UI* is set to *Yes*.

2.3 Creating a Quote From an Opportunity

To create a quote from an opportunity:

Prerequisites

- The user must be logged into Oracle Field Sales to perform this procedure.
- You must either use an existing opportunity or create a new one. See the *Oracle Field Sales User Guide* for detailed instructions on creating and accessing opportunities.

Navigation

Oracle Field Sales > Opportunity > Opportunities

Field Behavior

- Contract Template

A default contract template is defaulted from the profile option *ASO: Default Contract Template*. This field is only enabled if the profile *OKC: Enable Sales Contracts* is set to *Yes*.

- Flexfields

Flexfields are displayed if *ASO: Display Header Flexfields with Quote Header in HTML UI* is set to *Yes*.

- The following fields, when available, are defaulted to the quote, and **cannot** be changed:
 - Customer Name
 - Account Number

Note: If the customer has only one account number, the account number and description default into the account field. If there are multiple account numbers, they are displayed, with descriptions, in a drop-down menu for selection. If there are no account numbers, one will be created in Quoting based on the setting of the profile option *ASO: Auto Account Creation*. See [Section 7.1.2, "Creation of Accounts"](#) or the *Oracle Quoting Implementation Guide* for more information.

- Opportunity Name

Note: If the sold-to address is invalid when an opportunity is converted to a quote, the address is not carried over to the quote and no values will be defaulted in to the Bill To and Ship To address fields.

2.4 Creating a Quote From a Template

You can create a quote by selecting the template hyperlink and then selecting **Create Quote**. You will not be able to create, modify, or delete templates if *ASO: Manage Quotes Templates* is set to *No*.

To create a quote from a template:

Navigation

Quoting > Templates

2.5 Creating a New Version of a Quote

View all versions of a quote from the Overview page, left menu bar by selecting **Versions** under Other Information. When you create a new version, the version number increments by one.

To create a new version of a quote:

Prerequisites

- The user must have update access to the quote.
- The highest version of the quote is not in one of the following statuses:
 - Approval Pending
 - Order Submitted

Notes

If Sales Contracts integration is enabled and you create a new version, the following contract-related information will be copied to the new version:

- Contract document attachments
- User Variables

The following information will not be copied to the new version:

- Contract acceptance details

Additionally, you can review contract terms of previous quote versions with user and system variables resolved for specific versions of the quote.

Creating and Modifying Templates

This section outlines the creation and use of templates in Oracle Quoting. You can only create and modify templates in the HTML UI.

- [Section 3.1, "Overview of Templates"](#)
- [Section 3.2, "Creating a Template"](#)
- [Section 3.3, "Modifying a Template"](#)
- [Section 3.4, "Deleting a Template"](#)
- [Section 3.5, "Adding a Template to an Existing Quote"](#)

3.1 Overview of Templates

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

If the profile option *ASO: Manage Quote Template* is set to *No* at the appropriate level, you cannot create, modify, or delete templates. Regardless of the profile setting, you can create a quote from a template and apply a template to an existing quote.

3.2 Creating a Template

To create a quote template:

Prerequisites

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

Navigation

Quoting > Templates > Create Template

3.3 Modifying a Template

To modify a template:

Prerequisites

The profile option *ASO: Manage Quote Template* must be set to *Yes*.

Field Behavior

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

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

Navigation

Quoting > Templates

3.4 Deleting a Template

To delete a template:

Prerequisites

The profile option *ASO: Manage Quote Template* must be set to *Yes*.

Navigation

Quoting > Templates

3.5 Adding a Template to an Existing Quote

To add a quote template to an existing quote:

Prerequisites

- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote must not be submitted for batch processing.
- Quote templates must be set up.

Navigation

Quoting > Lines > Actions > Add Product

Steps

1. Change the Source to *Quote Templates*.
2. Search for and select a quote template(s). Click **Select** to add to the quote, or **Select and Add More** if you want to add another template or product.

Once added to the quote, the products in the quote template(s) appear as quote lines.

This section contains information on performing searches in Oracle Quoting.

- [Section 4.1, "Overview of Searching"](#)
- [Section 4.2, "Overview of Searching for Quotes"](#)
- [Section 4.3, "Basic Search for Quotes"](#)
- [Section 4.4, "Saved Searches"](#)
- [Section 4.5, "Using interMedia Search"](#)

4.1 Overview of Searching

Basic search functionality in Quoting includes the use of Search and Select pages. These pages are accessed by clicking the Go button next to the field. Within the Search and Select pages, you can enter either a keyword for an exact match or a keyword and a wildcard for a "begins with" match.

You can search for the following values in the HTML UI:

- Address
- Contact
- Contract
- Customer
- Extended Attributes
- Opportunity
- Product
- Promotion Code

- Salesperson
- Source Name

The Search and Select: Customer page is used to search for customers, account, and contacts. The search results display a Registry ID for each customer. The Registry ID, a unique party identifier in TCA, is also known as the Party Number.

4.2 Overview of Searching for Quotes

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

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

An Advanced search allows you to search using:

- Quote name
- Quote number
- Customer name (Party Name)
- Customer type
- Account number (financial account)
- Contact name
- Opportunity name
- Status
- Web published
- Quote amount range
- Currency
- Update date range
- Expiration date range
- Creation date range

- Sales person
- Sales group
- Option to restrict to primary salesperson and primary sales group
- Sales channel
- Source name

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

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

4.3 Basic Search for Quotes

To perform a basic search for a quote:

Navigation

Quoting > Quote Search

Steps

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

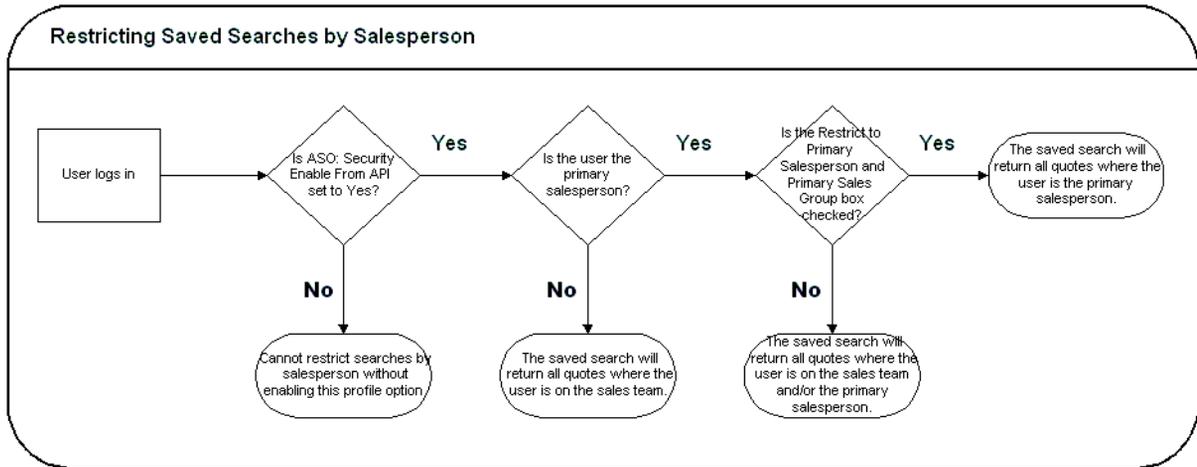
4.4 Saved Searches

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

Note: You cannot delete or modify seeded saved searches (searches marked with an asterisk) except the Default Saved Search flag.

If you want to restrict saved searches so that only quotes where the user is on the sales team and/or the primary salesperson, you must set *ASO: Security Enable From API* to *Yes*. See the *Oracle Quoting Implementation Guide* for more information on this profile option.

The following diagram shows the saved search process if trying to restrict the saved search by salesperson.



There are four seeded saved searches:

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

Note: Seeded searches only search against quotes belonging to the sales team of the logged-on user.

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

4.4.1 Creating a Saved Search

To create a saved search:

Navigation

Quoting > Personalize

Steps

1. Select **Personalize** in the Saved Searches bin. The Saved Searches page opens displaying a list of your saved searches.
2. Click **Create Saved Search**.
3. Select **Apply** to save the search.
4. Select **Apply and View** to save the search and view it in the main Quotes page.

4.5 Using interMedia Search

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

- Part Number
- Description
- Long Description

interMedia search performs keyword searches and does not require wildcards.

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

- \
- ,
- &
- (
-)
- ?
- }

-]
- {
- [
- -
- ~
- |
- \$
- !
- >

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

Credit Checks

This section contains information about performing credit checks.

- [Section 5.1, "Overview of Credit Checking"](#)
- [Section 5.2, "Performing a Credit Check"](#)

5.1 Overview of Credit Checking

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

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

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

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

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

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

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

5.2 Performing a Credit Check

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

To perform a credit check:

Prerequisites

- *ASO: Enable Credit Check* must be set to *Yes* at the appropriate level.
- The quote status must not be **Order Submitted**
- The quote must not be expired.
- The highest version of the quote must be used.
- The quote must not be submitted for batch pricing.
- There must be a designated Billing customer with an account and a billing address on the quote.
- Pricing and Tax Statuses must both be complete.

Navigation

Quoting > Actions > Initiate Credit Check

Pricing Products and Quotes

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

- [Section 6.1, "Overview of Pricing"](#)
- [Section 6.2, "Applying Header Promotion Codes"](#)
- [Section 6.3, "Applying Line Level Promotion Codes"](#)
- [Section 6.4, "Applying a Header Level Discount"](#)
- [Section 6.5, "Applying a Line Level Discount"](#)
- [Section 6.6, "Applying Pricing Agreements"](#)
- [Section 6.7, "Freezing Prices for a Quote"](#)
- [Section 6.8, "Executing Manual Pricing Requests for a Quote"](#)
- [Section 6.9, "Viewing and Entering Quote Tax Details"](#)

6.1 Overview of Pricing

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

Start and End (Expiration) Dates

For pricing elements with effectivity dates, Quoting will behave as follows:

- For a start or beginning date, effectivity begins at the beginning of the specified date (12:00 a.m.)

- For an end or expiration date, effectivity ends at the end of the specified date (11:59:59 p.m.)

6.1.1 Price Lists

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

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

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

- Agreement
- Quote-to-Customer
- Order Type

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

Multi-Currency Price Lists

Multi-currency price lists simplify pricing setup if you are selling products to customers in multiple countries.

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.

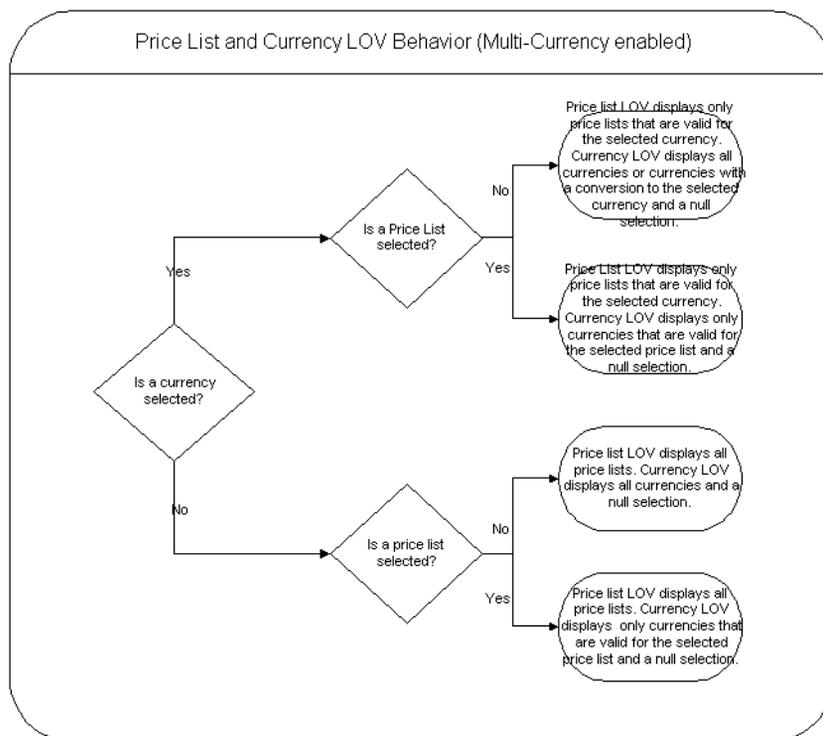
The use of multi-currency price lists is controlled by the profile options QP: Multi-Currency Installed and QP: Multi-Currency Usages. If QP: Multi-Currency Installed is set to Yes, Quoting shows all price lists with the selected currency as base currency, as well as all price lists where there is a 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.

QP: Multi-Currency Usages should be set to Yes at the application or responsibility level.

Note: You should not try to disable multi-currency price list functionality, by setting the multi-currency price list profile option back to *No*. See the Oracle Quoting Implementation Guide and the Oracle Advanced Pricing Implementation Guide for more information.

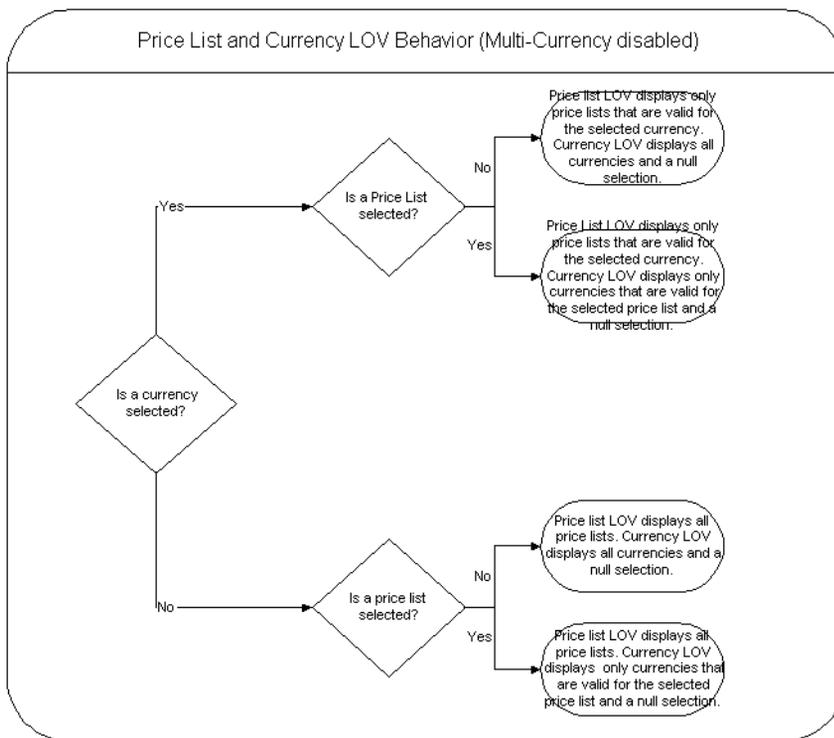
With multi-currency price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

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. 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.

6.1.2 Discounts

Oracle Quoting allows both order-level and line-level discounts. Order-level discounts are applied to each line on the quote, while line-level discounts are

applied to specific lines only. If there are multiple discounts available for an order or a line, the application combines them.

Example

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

- The coat: $\$200 - 50\% = \100
- The shirt: $\$100 - 60\% = \40
- Total price = \$140

6.1.3 Charges

Charges are a supplemental cost associated with the purchase of a product or service. Charges are generally added to a quote when a task is being performed in conjunction with the product or service (for example, shipping fees or installation charges). In Quoting, charges consist of all freight and special charge modifiers applied to the quote. Header level charges appear within the Quote Grand Total sections of the UI. Clicking the Charges link opens the Charges Summary form, which lists each charge and indicates if it is applied at the header or line level.

You can also view the charges for each line on the Lines page. Clicking the linked amount in the Charges field displays the Charges Details page, which lists each charge applied to the line.

6.1.4 Pricing Adjustments

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

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

Pricing Date

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

6.1.5 Manual Adjustments

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

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

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

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

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

Unit Selling Price

Unit Adjustment Percent

Line Discount

Manual adjustments are available only if the profile *ASO: Discounting Privilege* is set to *Full*. If the product is a promotional good, *ASO: Enable Promotional Good Price Override* must also be set to *Yes*.

6.1.6 Promotional Goods

A Promotional Good is a free or discounted product that is automatically added to the quote when a qualifying product (or products) are purchased. The modifier that contains the qualifying conditions is set up in Oracle Advanced Pricing. Refer to the *Oracle Quoting Implementation Guide* for setup restrictions.

Note: The line category for a promotional good line must be *Order*.

For example, if a computer is the qualifying good and a mouse is the promotional good, when you add the computer to the quote, the mouse is added automatically. While the Unit List Price lists the actual price of the product if you were to purchase

it, the Total Price for the line displays the promotional price. A promotional price is typically 0, but can also be set up to be greater than 0.

If an agreement is associated with the promotional good, the agreement price list will not override the promotional good price list. Additionally, once the promotional good is added to the quote, you will not be able to change the quantity, UOM, or price list.

Note: There can be multiple promotional goods for a qualifying item.

If the qualifying good is deleted from the quote, the promotional good is automatically deleted as well. If there are multiple qualifying goods and one is deleted, the promotional good will be removed.

Note: A promotional good is always added as the last item on a quote. There is no special line ordering for promotional goods.

Behavior

If a promotional good is included on the quote, you can:

- View Related Items
- Perform Trade ins - You can search the customer's installed base and select a promotional good as a trade-in. Although the customer received the item for a promotional price or for free, the trade-in is priced according to the rules set up in Advanced Pricing.

6.1.7 Terms Substitution

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

- Payment Terms Substitution (Header-level only)
- Freight Terms Substitution
- Shipping Method Substitution

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

Quoting displays the terms substitution modifiers for each line (both at header and line level) in the Pricing Details pop-up window.

To ensure that a particular terms substitution modifier is applied, the pricing administrator 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.

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

6.2 Applying Header Promotion Codes

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

Note: You cannot add duplicate promotion codes.

To apply header level promotion codes:

Navigation

Quoting > Pricing > Add Promotion Codes

6.3 Applying Line Level Promotion Codes

To apply line level promotion codes:

Navigation

Quoting > Lines > Actions > Adjust Pricing > Add Promotion Codes

6.4 Applying a Header Level Discount

To apply a header level discount:

Prerequisites

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

Navigation

Quoting > Lines

Field Behavior

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

6.5 Applying a Line Level Discount

To apply a line level discount:

Prerequisites

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

Navigation

Quoting > Lines

Field Behavior

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

- Line Discount

This field uses *ASO: Require Minus Sign for Manual Discount* to determine how discounts and surcharges are applied. See the *Oracle Quoting Implementation Guide* for more information.

- Unit Selling Price, Unit Adjustment Percent, Line Discount

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

- Unit Selling Price
- Unit Adjustment Percent
- Line Discount

6.6 Applying Pricing Agreements

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

When creating a quote, you can select an applicable pricing agreement. For an existing quote you can select a pricing agreement in the General page. You can also select agreements at the line level. If a line level agreement is selected, the line price list defaults from the selected agreement.

The Agreement LOVs display all agreements in all currencies set up for the selected sold-to customer and all agreements in all currencies with no customer specified.

Agreements and Currency

If the price list associated with the header level agreement has a different currency than what is currently selected on the quote or there is no conversion to the currency on the quote, the agreement price list will be defaulted and the currency will be changed to the base currency for the price list.

If the price list associated with the line level agreement is of a different currency than what is currently selected on the quote or there is no conversion to the currency on the quote, the price list will not be defaulted. The price list will default to null.

If the quote currency is the same as the price list currency or there exists a conversion to that currency, both header and line level price lists are defaulted.

Prerequisites

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

Navigation

Quoting > General (header-level)

Quoting > Lines > Actions > Adjust Pricing (line-level)

6.7 Freezing Prices for a Quote

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

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

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

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

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

Prerequisites

- The highest version of the quote must be used.
- The quote is not in a read-only status.
- The current Pricing Date must not be null.
- The quote must not be submitted for batch processing

6.8 Executing Manual Pricing Requests for a Quote

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

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

You can now choose when each quote is priced, if the profile option *ASO: Calculate Price* is set to *Manual*. You can also choose to calculate tax manually by setting *ASO: Calculate Tax* to *Manual*. Depending on the setting of *ASO: Enable Batch Processing* you can choose to price the quote interactively or through a batch request. See the *Oracle Quoting Implementation Guide* for more information.

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

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

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

The option to manually price a quote is particularly helpful to users who have complex tax or pricing setups or who are:

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

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

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

- Submit a quote for approval
- Approve a quote
- Web publish a quote
- Initiate a credit check
- Print a quote
- Create a proposal
- Place an order

To manually price a quote:

Prerequisites

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

Navigation

Quoting > Overview > Action > Price Quote

Field Behavior

- Price Quote Action

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

The *Tax Only* option is disabled if *ASO: Calculate Tax* is set to *Automatic*.

- Price Quote Now or Submit pricing request and notify me when it is complete

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

Steps

1. Upon Submission of a pricing call:

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

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

6.8.1 Viewing Details of the Pricing Request

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

The Pricing Request Details page displays:

- Pricing and Tax Statuses
- Pricing Request ID
- Date Submitted
- Request Name

- Phase
- Requestor
- Date Started
- Status

To view pricing request details:

Prerequisites

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

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

Navigation

Quoting > Overview

Steps

1. Select the Pricing Request link on the Overview page.

6.8.2 Canceling a Pricing Request

To cancel a pricing request:

Prerequisites

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

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

- These highest version of the quote must be used.

- The quote is not in a read-only status.
- User must have Update access.

Navigation

Quoting > Overview

Steps

1. Select **Cancel Pricing Request** from the Actions menu on the Overview page.
The Pricing Request status changes to Canceled. A message displays indicating that the pricing request was canceled.
The user also receives an email notification confirming the cancellation.

6.9 Viewing and Entering Quote Tax Details

Tax handling options are located on the Pricing page.

There are three tax options:

- **Exempt** — The current quote is exempt for a normally taxable customer site.
- **Require** — The current quote is taxable for a normally non-taxable, ship-to customer or product.
- **Standard** — Taxation for the current quote should be based on existing exemption rules.
- **Override Exemptions** — This value is only valid if you are using a non-Oracle tax engine, and is ignored by the Oracle Tax Engine. If selected, the same behavior outlined in the *Require* tax option applies.

Note: If tax setup is based on Latin tax, the Tax Handling, Exempt Reason, and Exempt Number fields will not appear on the Pricing page.

To enter tax exemption information for a quote:

Navigation

Quoting > Pricing

Field Behavior

- **Exemption Reason**

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

Customers and Relationships

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

- [Section 7.1, "Overview of Customers and Relationships"](#)
- [Section 7.2, "Creating Customers"](#)

7.1 Overview of Customers and Relationships

There are two customer types in Quoting:

- Person
- Organization

Parties of type **person** are individuals purchasing on their own behalf. A person can have multiple addresses and telephone numbers, but must have a primary address.

Parties of type **organization** may be a company, a company subsidiary or branch, an association, a non-profit, or a government branch. Each organization must have a primary address, but can have multiple additional addresses and contacts associated with it. The address may belong to the organization or the contact.

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

7.1.1 Customer Data

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

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

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

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

Customer information can be grouped into the following areas:

Quote-To Information

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

Bill-To Information

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

Ship-To Information

- **Ship-to Customer** — The name and financial account information of the customer to whom the goods or services are delivered.
- **Ship-to Contact** — A person representing the shipping customer, only when the shipping customer is of party type *organization*, who deals with all shipping-related issues for the order, and who typically receives the shipment. This is an optional field.
- **Ship-to Address** — A physical location where the products are sent. The ship-to address can be associated with either the ship-to customer or ship-to contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is saved.

7.1.2 Creation of Accounts

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

Note: If the customer does not have any active financial accounts, they will be treated as a *Prospect*.

Oracle Quoting allows you to determine at which point an account is created. For more information on the following profile options, see the *Oracle Quoting Implementation Guide*.

Account creation is based on the following profile options:

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

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

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

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

Table 7-1 Quoting Behavior Based on Profile Options

Profile Option Setting	Create Sold-To	Select Sold-To	Create Ship-To/Bill -To	Select Ship-To/Bill -To	Web Publishing	Order Conversion
<i>ASO: Auto Account Creation</i> set to <i>Always</i>	Create account	Create account if party does not have any	Create account	Create account if party does not have any	NA	NA
<i>ASO: Auto Account Creation</i> set to <i>As Required</i>	Do not create account	Do not create account	Do not create account	Do not create account	Create account for all customers in quote without account	Create account for all customers in quote without account
<i>ASO: Auto Account Creation</i> set to <i>Place Order</i>	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.

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.

7.2 Creating Customers

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

To create a new customer in Oracle Quoting:

Prerequisites

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

Navigation

Quoting > Create Quote > Customer LOV > Create Customer

Quoting > Lines > Actions > Modify Shipping and Billing > Customer LOV > Create Customer

Quoting > Shipping and Billing > Customer LOV > Create Customer

Field Behavior

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

7.2.1 Creating Contacts

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

To create a contact in Oracle Quoting:

Prerequisites

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

Navigation

Quoting > Create Quote > Contact LOV > Create Contact

Quoting > General > Contact LOV > Create Contact

Quoting > Lines > Actions > Modify Shipping and Billing > Contact LOV > Create Contact

Quoting > Shipping and Billing > Contact LOV > Create Contact

7.2.2 Creating Addresses

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

To create an address in Oracle Quoting:

Prerequisites

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

Navigation

Quoting > Shipping and Billing > Address LOV > Create Address

Entering Address and Payment Information

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

- [Section 8.1, "Overview of Address and Payment Information"](#)
- [Section 8.2, "Address Defaulting"](#)
- [Section 8.3, "Entering Shipping and Billing Information"](#)
- [Section 8.4, "Entering Payment Information"](#)
- [Section 8.5, "Entering Line-Level Shipping or Billing"](#)

8.1 Overview of Address and Payment Information

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

- **Quote-To Address** — Address for the customer or contact.
The quote-to address is optional. It may be passed to the quote from an opportunity, but it is not passed into Oracle Order Management when converting a quote to an order.
- **Ship-To Address** — Address where the order is sent.
The ship-to address can be associated with either the ship-to customer or contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is saved.
- **Bill-To Address** — Address where the bill is sent.

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

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

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

8.2 Address Defaulting

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

The application searches for and defaults only active addresses.

Quote-To

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

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

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

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

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

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

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

Bill-To

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

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

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

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

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

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

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

Ship-To

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

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

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

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

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

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

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

8.3 Entering Shipping and Billing Information

To enter shipping and billing information for a quote:

Navigation

Quoting > Shipping and Billing

Field Behavior

- Shipping and Billing Customer fields

The shipping and billing customer fields are automatically populated with the Quote-To Customer name and account, if any.

Note: To create a new ship-to or bill-to customer, select **Create Customer** in the Search and Select: Customer page. This button does not appear on the page if *ASO: Create New Shipping/Billing Customers* is set to *No*. See [Section 7.2, "Creating Customers"](#) for more information.

- Shipping and Billing Contact

Note: To create a new ship-to or bill-to contact, select **Create Contact** in the Search and Select: Contact page. If Quoting Security does not permit you to create a new contact, this button does not appear on the page. See [Section 7.2.1, "Creating Contacts"](#) for more information.

- Shipping and Billing Address

The shipping and billing address have default values based on the information in [Section 8.1, "Overview of Address and Payment Information"](#).

Note: To create a new ship-to or bill-to address, select **Create Address** in the Search and Select: Address page. If Quoting security does not permit you to create a new address, this button does not appear on the page. See [Section 7.2.2, "Creating Addresses"](#) for more information.

- Shipping Method

This LOV lists the valid shipping methods for the item validation organization for the operating unit associated with the quote.

- Freight Terms

Freight terms indicates who pays for the freight costs and when they are to be paid.

This LOV lists the values in the Order Management lookup FREIGHT_TERMS. See the *Oracle Order Management Suite Implementation Manual* for more information.

- Shipment Priority

Indicates the urgency with which the order should be shipped. This LOV lists the values in the OM lookup SHIPMENT_PRIORITY.

- FOB

Indicates the point of location where the ownership title of goods is transferred from seller to buyer. This LOV lists values from the AR lookup FOB.

Notes

The following header level information is passed to Oracle Order Management upon submissions:

- Shipment Priority
- FOB
- Freight Terms

8.4 Entering Payment Information

Note: Oracle Quoting supports the use of Payment Terms Substitution. Please see [Section 6.1.7, "Terms Substitution"](#) for more information.

To enter payment information for a quote:

Navigation

Quoting > Shipping and Billing

Field Behavior

- Payment Terms

Payment Terms are defaulted at the time of quote creation, based on:

- Header-level Agreement

Payment term defaulting can also occur when the header-level agreement is assigned or changed.

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

8.5 Entering Line-Level Shipping or Billing

To designate line level shipping or billing:

Prerequisites

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

Navigation

Quoting > Lines > Actions > Modify Shipping and Billing

Field Behavior

- Warehouse

Indicates the preferred shipping warehouse for the product.

This field is read only if *ASO: Enable Manual Warehouse* is set to *No*.

- **Shipping Method**

If no warehouse is specified, the shipping method is validated against the Carrier-Ship Method relationships for the inventory organization of the product on the quote line.

The choices in this LOV are based on the quote line-level warehouse. If the warehouse changes, this value in this field is removed if the warehouse and shipping method combination is not valid. The shipping method is validated against the Carrier-Ship Method relationships for the warehouse specified on the quote line.

- **Freight Terms**

Freight terms indicate who pays for the freight costs and when they are to be paid.

This LOV lists the values in the Order Management lookup `FREIGHT_TERMS`. See the *Oracle Order Management Suite Implementation Manual* for more information.

- **Shipment Priority**

Indicates the urgency with which the order should be shipped. This LOV lists the values in the OM lookup `SHIPMENT_PRIORITY`.

- **FOB**

Indicates the point of location where the ownership title of goods is transferred from seller to buyer. This LOV lists values from the AR lookup `FOB`.

Notes

The following line level information is passed to Oracle Order Management upon submission:

- Warehouse
- Shipment Priority
- FOB
- Freight Terms

Modifying Quotes

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

- [Section 9.1, "Adding Products to the Quote"](#)
- [Section 9.2, "Removing Products From the Quote"](#)
- [Section 9.3, "Adding Services to Quotes"](#)
- [Section 9.4, "Configuring Products"](#)
- [Section 9.5, "Duplicating a Line"](#)
- [Section 9.6, "Adding a Related Product"](#)
- [Section 9.7, "Checking Product Availability"](#)
- [Section 9.8, "Adding Trade-Ins to Quotes"](#)
- [Section 9.9, "Splitting Lines"](#)
- [Section 9.10, "Viewing Quote History"](#)
- [Section 9.11, "Linking a Quote to an Opportunity"](#)
- [Section 9.12, "Entering Sales Supplement Information"](#)
- [Section 9.13, "Changing the Base UOM for a Line"](#)
- [Section 9.14, "Changing the Order Type for a Quote"](#)
- [Section 9.15, "Using Descriptive Flexfields"](#)

9.1 Adding Products to the Quote

You can search for products to add to quotes. For information on how the product search is filtered, refer to [Section 4.5, "Using interMedia Search"](#).

Note: Currently, interMedia search is only supported for searches against the product catalog.

To add products to the quote:

Navigation

Quoting > Lines > Add Product

Field Behavior

- Search In (Product Catalog)

Selecting ALL Categories will search across all inventory categories. The Product Category LOV will show all categories that belong to the category set, that contain at least one product. The LOV is filtered based on category set.

- Product (text field)

If interMedia search is enabled, you can search by Part Number, Description, or Long Description. If not, you can use wildcards.

Steps

1. Ensure that the Source is **Product Catalog**.
2. Once you selected your product, click **Select** to add the product(s) to the quote and return to the Lines page or click **Select and Add More** to add the product(s) and then search for additional products in different categories.

The product(s) appears on the Lines page with a hyperlinked description. Clicking the hyperlink displays a Product Details pop-up window.

9.1.1 Line Numbers

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

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

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

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

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

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

Table 9–1 Line Numbers and Product Types

Line Number	Product Type
1.0	Standard Product
2.0	Top level model product
2.0.1	Service for model
2.0.2	Service for model
2.1	Component #1 (option class)
2.1.1	Service for component
2.2	Component #2 (Child of option class)
3.0	Service for serviceable product in the Installed Base
4.0	Serviceable product

Table 9–1 Line Numbers and Product Types

Line Number	Product Type
4.0.1	Service for serviceable product
4.0.2	Service for serviceable product

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

9.2 Removing Products From the Quote

To remove a product from a quote:

Navigation

Quoting > Lines

Steps

1. After selecting the line to remove, select **Actions > Remove Line > Go**. The product is removed from the quote.
2. Optionally, change the quantity to zero and select **Apply** to remove products from the quote.

Note: This option allows you to delete multiple products simultaneously.

9.3 Adding Services to Quotes

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

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

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

Services can apply to serviceable products:

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

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

Once a service is added to a quote, you can view service details by clicking on the hyperlinked service description.

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

Prerequisites

The serviceable product line to which you want to add a service must be selected.

Navigation

Quoting > Lines > Actions > Add Services

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

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

Prerequisites

- There must be a serviceable product in the Installed Base to which you can associate the service.
- The serviceable product, to which you want to associate a service, must be selected.

Navigation

Quoting > Lines > Add Service to Previous Purchase

Field Behavior

The Product Category LOV will show all categories that belong to the category set. Additionally, the product catalog will only show categories (for the category set) that contain at least one product.

Steps

1. Select **Installed Base** from the Source drop-down and search for a serviceable product.
2. The service you select will appear as a separate quote line on the Lines page.

9.3.2 Adding a Service for a Product on a Pending Order

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

Prerequisites

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

Field Behavior

The Product Category LOV will show all categories that belong to the category set. Additionally, the product catalog will only show categories (for the category set) that contain at least one product.

Steps

1. Select **Pending Orders** from the Source drop-down and search for a serviceable product.
2. The service you select will appear as a separate quote line on the Lines page.

9.3.3 Modifying a Service

To modify services after they are added to the quote:

Prerequisites

The service to modify must be selected.

Navigation

Quoting > Lines > Actions > Modify Service

9.4 Configuring Products

Quoting accesses Oracle Configurator to configure model products. For information on using Configurator, refer to the *Oracle Configurator Implementation Guide*.

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

To configure a Model product:

Prerequisites

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

Navigation

Quoting > Lines > Actions > Configure

Field Behavior

- Product

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

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

- Quantity

If you change the quantity of the top level model product, the quantity of all the components will be updated to match the model product's quantity. If you change the quantity of a component, the top level model product and all its child components will be updated to match the quantity.

9.4.1 Deleting a Component

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

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

Prerequisites

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

Navigation

Quoting > Lines > Actions > Remove Line

9.4.2 Duplicating an Existing Configuration in a Quote

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

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

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

Prerequisites

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

Navigation

Quoting > Lines > Actions > Duplicate Line

Steps

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

9.5 Duplicating a Line

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

If you duplicate a line with associated sales supplement information, the information is carried in to the new line(s).

To duplicate a line:

Prerequisites

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

Navigation

Quoting > Lines > Actions > Duplicate Line

9.6 Adding a Related Product

To add a related product to the quote:

Prerequisites

Product relationships must be set up in Oracle Inventory.

Navigation

Quoting > Lines > Actions > Add Related Products

9.7 Checking Product Availability

To check the availability of products in a quote:

Prerequisites

Availability is checked for each line. You must select a line before clicking the **Check Availability**.

Navigation

Quoting > Lines > Check Availability

9.8 Adding Trade-Ins to Quotes

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

When the application calculates the order total, it recognizes products with the line category code **Return** as trade-ins. The application treats trade-in prices as credits and subtracts them from the order total. Tax is calculated for trade-ins, for the current date.

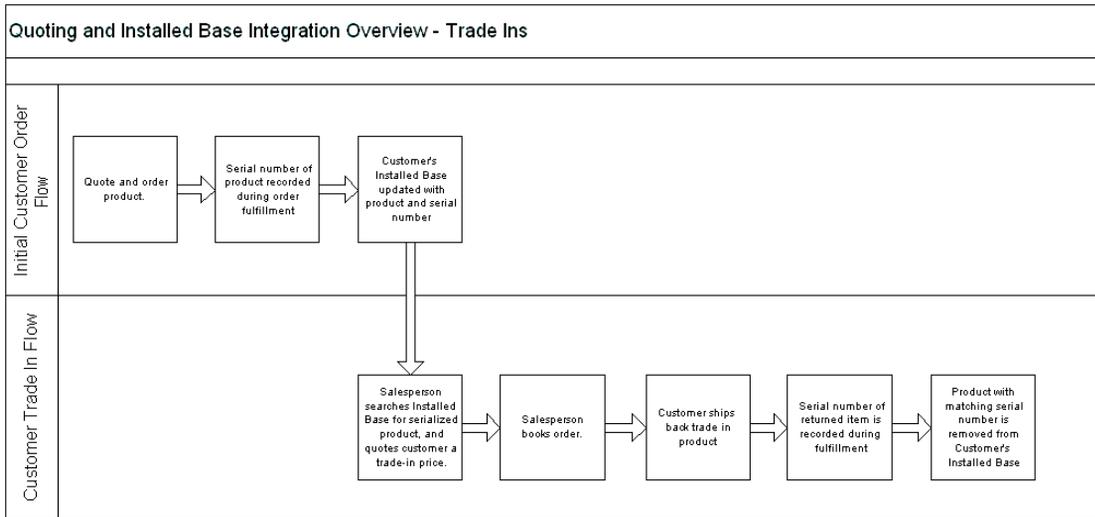
You can also search the current quote-to customer's Install Base for trade-ins. Install Base only supports the trade-in of serialized products with a line flow of "Return with Receipt."

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

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

You can override trade-in product prices manually, as detailed in [Section 6.1.5, "Manual Adjustments"](#)

Quoting supports the following trade-in flow:



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

9.8.1 Adding a Trade-in to the Current Quote

To add a trade-in to a quote:

Prerequisites

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

Navigation

Quoting > Lines > Add Product

Notes

You can view details of a trade-in by clicking on the hyperlinked description.

Steps

1. Using the procedure outlined in [Section 9.1, "Adding Products to the Quote"](#), search for and select the product you want to trade-in.
2. Choose **Actions > Adjust Pricing > Go**.
3. In the Summary section, change the Line Category Code to **Return**. Select **Apply**.

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

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

9.8.2 Adding a Trade-in From the Customer Install Base

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

Prerequisites

The order category for the order type must be **Mixed**.

Navigation

Quoting > Lines > Add Product

Field Behavior

The Product Category LOV will show all categories that belong to the category set. Additionally, the product catalog will only show categories (for the category set) that contain at least one product.

Steps

1. Select **Installed Base**, and search for and select a product to trade in.

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

2. Choose **Select** to add the trade-in(s) to the quote and return to the Lines page or choose **Select and Add More** to add the trade-ins and then search for additional trade-ins in different categories.

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

9.9 Splitting Lines

To split a line:

Prerequisites

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

Navigation

Quoting > Lines > Actions > Split Line

Notes

- Once you split the quantity of a line, the Lines page displays the split quantities as separate lines.
- If you split a line with associated sales supplement information, the information is carried in to the new line(s).

9.9.1 Splitting a Configured Line

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

To split a configured line:

Prerequisites

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

Navigation

Quoting > Lines > Actions > Split Line

9.10 Viewing Quote History

To view the history of the current quote:

Navigation

Quoting > Versions

Field Behavior

- Versions
 - Selecting the linked version number accesses an overview of the quote version.

9.11 Linking a Quote to an Opportunity

To link a quote to an opportunity:

Navigation

Quoting > General

Steps

1. Use the Search and Select: Opportunity page to search by Name or Number, for an opportunity.

9.12 Entering Sales Supplement Information

Sales Supplement allows the capture of additional quote-specific information that is not passed into Oracle Order Management. You can enter sales supplement at line level or at header level.

To enter Sales Supplement information:

Prerequisites

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

Navigation

Quoting > Sales Supplements (Header)

Quoting > Lines > Actions > Enter Sales Supplement

Steps

1. Select a template from the Template drop-down menu. The page refreshes, displaying the template.

A value is defaulted into this field based on the setting of either the profile option *ASO: Default Header Level Sales Supplement Template* or the profile option *ASO: Default Line Level Sales Supplement Template*.

2. From the View drop-down menu choose the section in which you want to enter information and select **Go**.
3. Enter information into the appropriate fields and select **Apply** to save your changes.

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

9.13 Changing the Base UOM for a Line

To change the base UOM for a line:

Prerequisites

The line for which you want to change the base UOM must be selected.

Navigation

Quoting > Lines > Actions > Adjust Pricing

Steps

1. In the Summary section, use the drop-down menu to change the UOM.

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

9.14 Changing the Order Type for a Quote

Order types, which classify orders and returns, are set up in Oracle Order Management (OM). The order type for a quote determines how that order will be processed in OM.

Note: The order category for each order type must be *Order* or *Mixed*.

You can change the order type for a quote at any time during the Quoting process. When changed, the order type is validated against the line category code for each of the quote lines. If there are lines with an invalid order type/line category code combination, the change to these lines will not be allowed.

Note: If the order type is changed, the defaulting logic for the price list is reapplied.

The defaulting behavior for Order Type is displayed on the Create Quote, Create Quote from Opportunity and General pages.

Prerequisites

- You must have Update access to the quote
- You must use the highest version of the quote
- The quote must not be in a read-only status
- The quote must not be submitted for batch processing

Navigation

Quoting > General

Field Behavior

- Order Type

The value defaulted into this field is from the profile option *ASO: Default Order Type*. The LOV lists all order types that have workflow assigned to them. It is not filtered based on line category code in the quote lines.

9.15 Using Descriptive Flexfields

To enter information into flexfields:

See the *Oracle Quoting Implementation Guide* and the *Oracle Applications Flexfields Guide* for more information on setting up flexfields.

Prerequisites

- Flexfields must be set up and customized identically in Oracle Quoting and Order Management.
- If you want to view and edit header-level flexfields in the Create Quote, Create Quote from Opportunity, and General pages, *ASO: Display Header Flexfields with Quoting Header in HTML UI* must be set to *Yes*.

Navigation

Header flexfields:

Quoting > Create Quote

Quoting > Overview > Additional Information

Quoting > Additional Information

Line Flexfields:

Quoting > Lines > Additional Information

Quoting > Lines > Specify Additional Information

Notes

If you navigate to a page with header- or line-level flexfields, you will be required to fill in mandatory flexfield information on that page.

Steps

1. For line-level flexfields, click the Details link in the Additional Information column.

You can also access line level flexfields using the Action *Specify Additional Information*.
2. Click in the descriptive flexfield to display the flexfield form.
3. Enter a value into each segment, either by typing it in or by choosing from the LOV.
4. Select **OK** to close the flexfield form.

Copying Quotes

This section contains information on copying quotes.

- [Section 10.1, "Overview of Copying a Quote"](#)
- [Section 10.2, "Copying Quotes"](#)

10.1 Overview of Copying a Quote

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

Note: The profile option *ASO: Automatic Numbering* must be set to *Yes* if you want to copy quotes in the HTML UI.

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

Table 10–1 Copy Quote Behavior

	Copy to New Quote
Quote Name	Yes
Quote Number	No
Version Number	No
Opportunity	No
Contract Template	Yes
Contract Clauses and User Variables	Yes
Contract Acceptance details	No

Table 10–1 Copy Quote Behavior

	Copy to New Quote
Contract Attachments	No
Expiration Date	No
Status	No
Published Flag	No
Sales Channel	Yes
Campaign	Yes
Primary Salesperson	Yes
Primary Sales Group	Yes
Order Number	No
Customer (party and account)	Yes
Contact	Yes
Quote-To Address	Yes
Ship-To Customer (Party and Account)/Contact/Address at Header Level and Line Level	Yes
Shipping Method, Shipping Instructions, Packing Instructions, Requested Delivery Date at Header and Line Level	Yes
Bill-To Customer (Party and Account)/Contact/Address at Header Level and Line Level	Yes
Payment Terms at Header Level	Yes
Payment and Tax Information at Header and Line Level	Yes
Regular Products, Configured Products, Services and their reference source, Quantity, and UOM	Yes
Manual Price Adjustments	Yes
Automatic Price Adjustments	Yes
Currency at Header Level	Yes
Price List at Header Level and Line Level	Yes

Table 10–1 Copy Quote Behavior

	Copy to New Quote
Pricing Agreement at Header Level	Yes
Promotion Codes at Header and line Level	Yes
Line Types	Yes
Line Category Code	Yes
Order Type	Yes
Sales Credits at Header and Line Levels	Yes
Attachments	No
Notes	No
Tasks	No
Descriptive Flexfields at the Header and Line Level	Yes
Sales Team	No (if ASO: <i>Automatic Sales Team</i> is set to <i>None</i>) Yes (if ASO: <i>Automatic Sales Team</i> is set to <i>Full</i> or <i>Partial</i>)
Approval History	No
Sales Supplement	No
Pricing Updated On	No
Pricing Status	No
Tax Updated On	No
Tax Status	No

10.2 Copying Quotes

You can copy a quote in the main Quoting page or from the Overview page.

To copy a quote into a new quote:

Navigation

Quoting > Overview > Actions > Duplicate Quote

Creating Proposals from Quotes

This chapter covers proposals integration.

- [Section 11.1, "Overview of Proposals"](#)
- [Section 11.2, "Creating a Proposal"](#)
- [Section 11.3, "Viewing Proposal Details"](#)

11.1 Overview of Proposals

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

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

11.2 Creating a Proposal

For additional information on creating a proposal, refer to the *Oracle Proposals User Guide*.

To create a proposal:

Prerequisites

- The quote is not expired
- The quote has not been submitted for batch pricing call

- The quote is not in Order Submitted status
- The highest version of the quote must be used.
- Pricing and Tax status must be Complete.

Navigation

Quoting > Proposals > Create Proposal

11.3 Viewing Proposal Details

To view proposal details:

Navigation

Quoting > Proposals

Steps

1. Select the hyperlinked name of the proposal to view details.

Initiating Approvals

This chapter discusses the approval process in Quoting.

- [Section 12.1, "Overview of Approvals"](#)
- [Section 12.2, "Initiating an Approval"](#)
- [Section 12.3, "Viewing Approval Details"](#)
- [Section 12.4, "Cancelling the Approval Process"](#)
- [Section 12.5, "Approving a Quote"](#)
- [Section 12.6, "Rejecting an Approval"](#)
- [Section 12.7, "Reassigning an Approval"](#)

12.1 Overview of Approvals

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

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

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

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

12.2 Initiating an Approval

When you initiate an approval, you can view the list of approvers and rules applicable to the quote, if any.

To initiate an approval:

Prerequisites

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

Navigation

Quoting > Approvals > Initiate Approval

Notes

The Initiate Approvals page displays the approvers and applicable rules for the approval process.

When a quote is approved, an email is sent to the next approver, indicating that the quote is awaiting approval. The status of the quote during this period is *Approval Pending*.

Field Behavior

- Obtain approvals from entire list of approvers

Selecting this option will begin the approval chain with the first approver on the list. The quote is subsequently passed to the next approver on the list each time it is approved.

- Obtain approval from the list of approvers starting with

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

12.3 Viewing Approval Details

To view approval details:

Prerequisites

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

Navigation

Quoting > Approvals

Field Behavior

- Result hyperlink
Shows approval details
- Approver Comments hyperlink
Shows approver comments
- Notification Detail hyperlink
Shows notifications sent to each approver

12.4 Cancelling the Approval Process

To cancel an approval process:

Navigation

Quoting > Approvals

Field Behavior

- **Cancel Approval Process**
This button is only available if the approval process has been initiated. If an approval process is not in progress, this button is replaced with an Initiate Approval button.

12.5 Approving a Quote

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

Refer to *Oracle Workflow Guide* for more information.

To approve a quote:

Prerequisites

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

Navigation

Self Service Applications > Workflow Administrator Web Applications > Worklist

Field Behavior

- [Click Here For Quote Details](#)

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

Steps

1. Select the notification for the quote requiring approval and click **Approve**.

12.6 Rejecting an Approval

To reject an approval:

Prerequisites

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

Navigation

Self Service Applications > Workflow Administrator Web Applications > Worklist

Steps

1. Select the notification for the quote requiring approval and click **Reject**. The quote status is now *Approval Rejected*.

12.7 Reassigning an Approval

To reassign an approval.

Prerequisites

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

Navigation

Self Service Applications > Workflow Administrator Web Applications > Worklist

Steps

1. Select the notification for the quote requiring approval and click **Reassign**.
2. After selecting the person to whom you want to assign the approval, select the **Transfer ownership of this notification** radio button.
3. To delegate authority for the notification, select the **Delegate authority for responding to this notification** radio button.

Negotiating Contract Terms on Quotes

This chapter covers the use of Sales Contracts.

- [Section 13.1, "Overview of Sales Contracts"](#)
- [Section 13.2, "Viewing Contract Details"](#)
- [Section 13.3, "Authoring and Negotiating Contract Terms"](#)
- [Section 13.4, "Managing Contract Documents"](#)
- [Section 13.5, "Validation"](#)
- [Section 13.6, "Printing Quotes with Contract Terms"](#)
- [Section 13.7, "Order Submission with Contract Terms"](#)

13.1 Overview of Sales Contracts

Note: It is strongly recommended that you implement Approvals if you plan to integrate with Oracle Sales Contracts and use the **Contract Terms** features. Use of the approvals process can help ensure that non-standard contract language receives additional approvals before the contract is presented to the customer. This documentation assumes that the contract terms on a quote are reviewed and approved internally before reaching the customer.

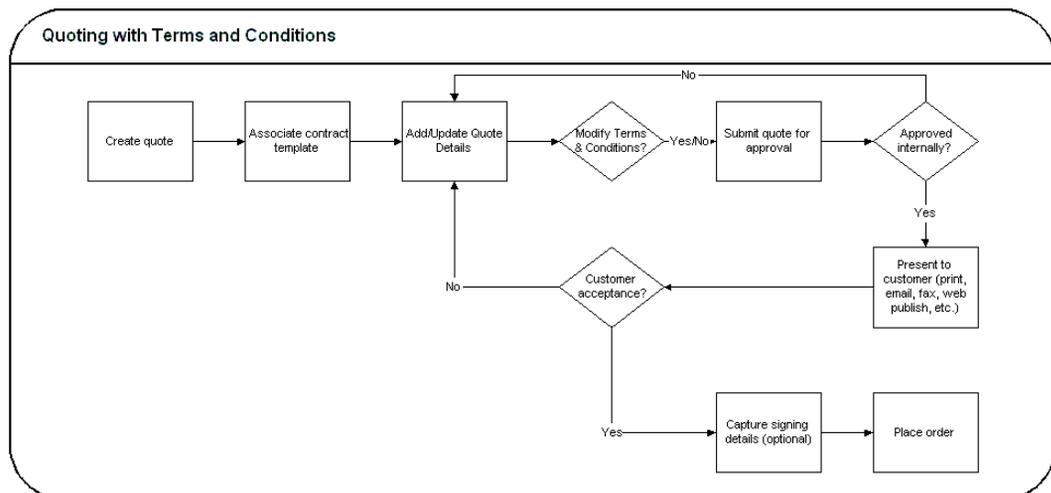
Oracle Quoting integrates with Oracle Sales Contracts to provide functionality to negotiate contract terms on a quote. The objective of Quoting/Sales Contracts integration is to automate the creation and delivery of quotes with standard or

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 *Sales Quote*. Refer to the *Oracle Contracts Implementation and Administration 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



Sales Contracts integration is controlled by the profile option *OKC: Enable Sales Contracts*. If the profile is set to *No*, all fields and options related to Sales Contracts

integration are disabled. Additionally, an error will appear when the users selects the **Contract Terms** hyperlink in the **Overview** page. Consult the *Oracle Quoting Implementation Guide, Release 11i*, for more details.

A prerequisite to perform all procedures mentioned in this chapter is that the profile be set to *Yes*. Additionally, the Contract Terms Library must be set up. Please refer to the *Oracle Contracts Implementation and Administration Guide, Release 11i*, for more details.

13.2 Viewing Contract Details

After selecting a quote to view, you can view contract details by selecting the **Contract Terms** hyperlink from the **Overview** sub-menu. The page displays contract details and customer acceptance information. From this page, you can enter contract acceptance information, and preview and update terms, if you have the appropriate access. This page is read only if:

- The quote is not executable
- The quote does not have an associated contract template
- You are not using the highest version of the quote
- The quote has been submitted for batch processing
- You do not have update access to the quote

Navigation

Quoting > Overview > Contract Terms

Field Behavior

- **Preview Terms**

Selecting the **Preview Terms** button launches a new browser window with the associated contract terms in PDF format. Available only if there is a contract template associated with the quote.

- **Update Terms**

Accesses the **Contract Terms** page. Hidden if one of the following is true:

- You are not viewing the highest version of the quote
- The quote is expired
- The quote is submitted for batch pricing

- The quote status is *Order Submitted*
- You have read-only access and the profile *ASO: Status Override* is set to *No*

13.3 Authoring and Negotiating 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 time of authoring. Contract templates contain standard, pre-approved clauses that are numbered and organized under sections so they appear in the proper order and within their appropriate sections 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 and Oracle Quoting passes the access level, depending on status of the quote and quote security setup, to Sales Contracts.

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.

Multiple users can access and update the contract terms simultaneously. If the following conditions hold true during simultaneous update to the quote and contract terms page, then changes made in the contract terms page will be prevented:

- The quote is changed to a read-only status
- The quote becomes expired
- The quote is submitted for batch processing
- The quote is not at the highest version

An additional level of security, controlling which contract negotiation features a user has access to, is covered in the Function Level Security section of the *Oracle Contract Implementation Guide, Release 11i*.

13.3.1 Associating a Contract Template to a Quote

You can associate a contract template to a quote at the time of quote creation, either from the Create Quote page or the Create Quote From Opportunity page.

Note: If you want to change the contract template later in the Quoting process, you must navigate to the Contract Terms page to do so.

Navigation

Quoting > Create Quote button > Create Quote page > Contract Template flashlight icon > Search and Select: Contract Template page

Field Behavior

- **Contract Template**

A default contract template is defaulted from the profile option *ASO: Default Contract Template*.

Steps

You can search for a contract template by either **Name** or **Description**.

Results display all valid contract templates that are associated with the document type *Sales Quote*.

13.3.2 Changing Contract Templates

You can change a contract template to a quote from the **Contract Terms** page. Once you create a quote, you can only change the contract template from the **Contracts Terms** page. If you change the contract template, all clauses associated with the

previous contract template are removed. Any manually added clauses will be retained and moved to an unassigned section.

Navigation

Quoting > Quote Name > Overview > Contract Terms > Update Terms button > Contract Terms page > Contract Template field > Change button > Search and Select: Contract Template page

Steps

You can search for a contract template by either **Name** or **Description**.

Results display all valid contract templates that are associated with the document type *Quote*.

13.3.3 Removing Terms

You can remove terms from a contract in the **Contract Terms** page.

Navigation

Quoting > Quote Name > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Remove Terms

Steps

Removing contract terms will remove all its sections, clauses and contract documents.

13.3.4 Adding Sections

You can add sections to the contract in the **Contract Terms** page.

Navigation

Quoting > Quote Name > Contract Terms > Update Terms > Contract Terms page

Steps

1. Select the section that is after or before the section you want to add or that you want to add a new section within.
2. Select the **Add Section** button and then determine the location of the new section by selecting **After**, **Before** or **Within** from the **Location** drop-down menu.

3. Create the section based on an existing section from the Contract Terms Library or create a new one. If you create a new section, enter a name and description. If you want to create the section based on an existing section, select the **Title** flashlight icon to access the **Search and Select: Title** page, where you can search the Library for existing sections.

13.3.5 Deleting Sections

In the **Contract Terms** page, you can delete a section by selecting the **Delete** icon in that row.

Navigation

Quoting > Quote name > Overview > Contract Terms > Contract Terms page

13.3.6 Searching, Browsing and Adding Clauses

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select the section or sub-section in which you want to add a clause.
2. Select the **Add Clause** button to search for or browse for a clause:
 - Search for a clause using the parameters listed, and click **Go** to view the **Results** sections which displays all clauses that are active of the current system date on which the action is performed. Select the **Show** link for any clause to review the clause text and instruction text.
 - Browse for a clause by folders by selecting the **Browse** button. Select the folder to view the clauses in the folder. Select the **Show** link for any clause to review the clause text and instruction text
3. Select the clause or clauses that you want to add and click **Apply**.

13.3.7 Updating Clauses

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select the **Focus** icon beside a section or sub-section name to see the clauses in the section.
2. Select the **Update** icon in the row of clause you wish to update.
3. In the **Update** Clause page, select the **Make Non-Standard** button.
4. Make the necessary changes.

Note: If the **Protect Text** check box is selected, you cannot update the clause.

5. Optionally, if you have added variables to the clause, you can select the **Value** flashlight icon beside the variable to select a value. You can then insert the variable into the text by selecting the place in the text where the variable is to be added, and selecting the **Insert** icon in the **Clause Variables** section. For more information on clause variables, consult the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

13.3.8 Deleting Clauses

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select the **Focus** icon beside a section or sub-section name to see the clauses in the section.
2. Select the **Delete** icon in the row of clause you wish to delete.

13.3.9 Creating Non-Standard Clauses

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select either a section, sub-section, or clause and then select the **Add Clause** button.
2. In the **Add Clause** page, select the **Create Non-Standard Clause** button.
3. Enter the following parameters:
 - **Clause Title**
 - **Type**
 - **Clause Text**

Optionally, you can also fill out the **Display Name** and **Description** parameters.

4. Optionally, you can add variables by selecting the **Add Variables** clause. In the **Add Variables** page, search for a variable by **Name**, **Description**, or **Type**. Click **Go**, and then select the variable name you wish to include.
5. If have added variables to the clause, you can select the **Value** flashlight icon beside the variable to select a value. You can then insert the variable into the text by selecting the place in the text where the variable is to be added, and selecting the Insert icon in the **Clause Variables** section. For more information on clause variables, consult the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

13.3.10 Creating a Non-Standard Clause from Standard Clauses

You can create non-standard clauses from a standard clause.

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select a clause and then select the **Update** icon.

2. In the **Update Clause** page, select the **Create Non-Standard Clause** button.
3. Make the appropriate changes.

Note: If the **Protect Text** check box is selected, you cannot update the clause.

13.3.11 Comparing Standard and Non-Standard Clauses

You can compare the text of two clauses when you have created a non-standard clause in a quote from a standard clause, and want to compare the non-standard clause with the original standard clause.

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select a clause name hyperlink to access the **View Clause** page.
2. In the **View Clause** page, select the **Compare to Standard Clause** button.
3. The **Compare Clauses** page displays a redline comparison of changes made to the clause text. Inserted text is underlined, deleted text is marked with a strike-through line.

Note: Changes to embedded variables within clause text are not compared on a quote. Variable tags are compared, not variable values.

13.3.12 Moving Contract Terms

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select either a section or clause to move and select the **Move** button.
2. In the **Move Term** page, select the destination location: **Before Selection**, **After Selection**, or **Within Selection**.
3. Select the appropriate radio button as the destination for the clause or section.
4. After clicking **Apply**, you will need to manually renumber the contract terms. Refer to [Section 13.3.13, "Renumbering Contract Terms"](#) for more information.

13.3.13 Renumbering Contract Terms

After making any changes such as moving or deleting sections and clauses, the contract terms must be manually renumbered. Numbering schemes are defined in the Contract Terms Library. For more information, please see the *Defining Numbering Schemes* section of *Oracle Contracts Implementation and Administration Guide, Release 11i*.

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page > Renumber button

Steps

In the **Renumber** page, select a numbering scheme from the **Pick Numbering Scheme** drop-down list. You may preview the numbering scheme before applying the changes to the contract terms.

13.3.14 Resolving Alternate Clauses

Some clauses in the quote may have alternate clauses that you can choose from. Access the **View Clause** page by selecting a clause name hyperlink from the **Contract Terms** page to view and choose any clause alternates.

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page > Clause name hyperlink

13.3.15 Checking for Clause Updates

Use the **Check for Clause Updates** function to view the list of clauses that have newer versions in the library, and then select the applicable ones to apply to the contract terms. This feature checks for latest updates for only those clauses that are currently in the contract.

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Check for Clause Updates > Compare Text icon

Steps

Review differences between the current and library versions, and then select the clauses you want to update.

13.3.16 Entering and Updating Clause Variables

In the **Update Variable Values** page, you can perform one or more of the following operations for each variable:

- Select the variable. The clauses that contain the selected variable appear in the **Clauses** section in the lower part of the page.
- Select the **Global Value** flashlight icon to set a global value for the variable.
- For each clause that uses that variable, select the **Value** flashlight icon to set a specific value for the variable in that clause.

For more information on creating variables, consult the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

Navigation

Quoting > Quote name > Overview > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Update Variable Values

13.4 Managing Contract Documents

Contract documents are files manually attached to a quote that represent or related to the quote's contractual terms. There are three categories of contract documents that can be added to your quote:

- **Contract:** a soft-copy document representing the entire formatted contract, created during the authoring of this contract.
- **Contract Image:** a scanned image of a hardcopy of the signed contract. Is attached manually to the contract document of any status.
- **Supporting Document:** any document such as an e-mail, fax, image, or spreadsheet.

While the quote is in draft mode, the user can add, update and delete the attached contract documents. You can have as many contract documents of each document category attached to the quote as you require.

13.4.1 Viewing Contract Documents

Navigation

Quoting > Overview > Contract Terms > Update Terms button > Contract Terms Page > Actions Menu > Manage Contract Documents > Manage Contract Documents page

Notes

To view the contract documents for a particular **Document Category** and **Quote Version**, choose the proper category and version from the lists of values.

13.4.2 Adding Contract Documents

You can add additional documents from your desktop. When you add a contract document from your desktop, you must specify the description and the category. When you update a contract document, and it was originally added from the desktop, you can change the description and the document category.

Navigation

Quoting > Overview > Contract Terms > Update Terms button > Contract Terms Page > Actions Menu > Manage Contract Documents > Manage Contract Documents page > Actions Menu > Add New Document > Add Contract Document page

13.4.3 Deleting Contract Documents

You can delete contract documents in the **Manage Contract Documents** page. Select the **Delete** icon in the row of the contract document you wish to delete.

Navigation

Quoting > Overview > Contract Terms > Update Terms button > Contract Terms Page > Actions Menu > Manage Contract Documents > Manage Contract Documents page

13.5 Validation

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

Validation ensures that customers are prevented from seeing invalid contract clauses, such as:

- 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 required and occurs automatically prior to the following 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*.

To manually validate a contract:

Navigation

Quoting > Overview > Contract Terms > Update Terms > Contract Terms page > Actions menu > Validate

Note: The automatic validation of clauses occurs when you Initiate an Approval for a quote, Web Publish a quote, or Print a quote. If there are validation warnings, a page will display the warnings. You can continue if there are only warnings.

13.6 Printing Quotes with Contract Terms

To print quotes containing contract terms, you must use the Oracle XML Publisher printing solution. Set the profile option *ASO: Print Quote Method* to *XML Publisher*.

The Oracle XML Publisher printing solution provides the ability to generate a printable PDF document that can be formatted according to a business' layout requirements. The layout of the quote printout and Contract Terms preview 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.

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 and printed in executable mode, 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 and heading for each section
- The ordered list of clauses within each section, with the sequence, label, and clause text for each clause

Note: Multiple XSL-FO Stylesheets may be created for use with Quote Printing, however only one stylesheet (template) may be specified (via profile *ASO: Default Layout Template*) for Contract Terms Preview.

To print a quote with contract terms:

Prerequisites

- *OKC: Enable Sales Contracts* must be set to *Yes* at the appropriate level.
- *ASO: Print Quote Method* must be set to *XML Publisher*

- A layout template (stylesheet) must be registered with XML Publisher Template Manager and specified in the profile option *ASO: Default Layout Template*.

Navigation

Quoting > Quote name hyperlink > Overview > Actions menu > Print Quote

Steps

Select the options to be included on the print out and click **Submit**.

If there are validation issues, a page may display warnings.

Depending on your browser setting, either a browser window opens displaying the printout or you are asked to open or save the printout. If you need a paper copy of the quote, choose your browser's Print option to print the quote.

13.7 Order Submission with Contract Terms

Upon order placement, the quote is submitted to Order Management. All negotiated terms, signing details, and attached contract documents on the quote become part of the Sales Order and can be referenced from Order Management.

Enabling Quoting Security

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

- [Section 14.1, "Overview of Security"](#)
- [Section 14.2, "Adding a Resource to the Quote Sales Team"](#)
- [Section 14.3, "Changing the Primary Salesperson"](#)

14.1 Overview of Security

Quoting Security is composed of three essential components:

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

Quote Access Security

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

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

Quote Function Security

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

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

New Quote Security

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

Primary Salesperson

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

If *ASO: Automatic Sales Team Assignment* is set to *None* and the quote creator does not meet these criteria, the sales representative selected in the profile option *ASO: Default Salesrep* will default as the primary salesperson. For more information on Primary Salesperson, see the *Oracle Quoting Implementation Guide*.

Note: You cannot save or submit a quote without a primary salesperson. If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*, a primary salesperson will be automatically selected after you save the quote.

14.1.1 Quote Access Security

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

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

14.1.1.1 Quote Availability Security

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

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

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

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

14.1.1.2 Quote Data Security

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

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

Manager Access

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

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

If the profile is set to *Inherit*, the manager has the same access level as the subordinate. If the profile is set to *Inherit* and the manager has multiple subordinates on the team with different access levels, the manager should inherit the highest access level.

14.1.2 Quote Function Security

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

- Override a quote status — The value of profile option *ASO: Status Override* controls the user ability to update a quote when it is in a read-only status. This ensures that the user can override quote data if a mistake was made before the quote was transitioned to a read-only status.
- Override the price list — The value of profile option *ASO: Price List Override* controls the user ability to change the selected price list for a quote. This functionality ensures that a user does not inadvertently quote an inaccurate price based on the selection of an incorrect price list.

- Create new customers — The value of profile option *ASO: Create New Customer* controls a user's ability to create new customer information. This functionality ensures that customers wishing to protect the integrity of customer data can restrict the creation of new customers to a limited number of users.
- Update customer information — The value of profile option *ASO: Update Customer* controls the user's ability to create new customer contacts and addresses.
- Update sales team information — The value of profile option *ASO: Update Sales Team* controls the user's ability to manually update sales team information, including addition or removal of members, changing access levels, and manual assignment of the primary salesperson.
- View and Update sales credit information — The values of profile options *ASO: Modify Sales Credits* and *ASO: View Sales Credits* determine if users can view and/or modify sales credit information.

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

Sales Team Security

Sales team security is controlled by the profile option *ASO: Update Sales Team*. If you set this profile to Yes for a given user, that user is able to:

- Add or remove a valid resource to/from the sales team
- Specify or change access levels for sales team members
- Designate a primary salesperson

If set to No, the user cannot update the sales team in any way.

If set to Partial, the user can perform the following activities:

- Add or remove another resource to/from the sales team if the user and the resource are part of the same sales group
- Change sales team details for an existing sales team member, only if both members are part of the same sales group.
- Change the primary salesperson and/or primary sales group

Note: Since sales team members can be part of multiple sales groups, Quoting uses the Current sales group when the profile *ASO: Update Sales Team* is set to Partial. In HTML, the Current sales group is obtained from the profile *OSO: Default Sales Group and Role*.

Sales Credit Security

Quoting provides function security that determines which sales credits a user can view and whether the user can modify sales credit information on a quote.

The profile option *ASO: Modify Sales Credits* governs a user's ability to modify sales credit information, including:

- Adding or removing sales credit receivers
- Entering sales credit percentages
- Entering sales groups
- Entering credit types

If this profile is set to Yes for a user, that user can modify sales credit information for all sales credit receivers on the quote.

If set to Partial for a user, the user can modify sales credit information for their subordinates, as well as their own information (assuming the user is a manager in the current sales group).

For users that do not have the ability to modify sales credits, there are three levels of privilege for viewing sales credit information on a quote.

- If the profile *ASO: View Sales Credits* is set to Yes for a user, the user can view all sales credit information on the quote.
- If set to Partial and the user has a manager role in the sales group, the user can view his/her own sales credit information as well as the information for their subordinates. If the user is not a manager, the user can view only his/her own sales credits.
- If set to No, users can only view their own sales credit information.

For users that cannot modify sales credit information, Quoting will show the total credit percentage for each sales representative/group combination instead of showing revenue and non-revenue credits separately.

14.1.3 New Quote Security

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

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

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

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

14.2 Adding a Resource to the Quote Sales Team

To add a resource to the quote sales team:

Note: The Keep Flag is supported in this release only if automatic sales team assignment is enabled.

Prerequisites

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

Navigation

Quoting > Sales Team

Field Behavior

Full Access

If selected, the sales team member has the ability to update quotes for which they are on the sales team.

Steps

1. Search for and select a resource. The Sales Team lists the new sales team member.

14.3 Changing the Primary Salesperson

To assign a new primary salesperson:

Prerequisites

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

Navigation

Quoting > General

Steps

1. In the quote header, use the Salesperson LOV to select a new primary salesperson.

Assigning Sales Teams and Allocating Sales Credits

This chapter outlines the procedures necessary to allocate sales credits.

- [Section 15.1, "Overview of Sales Team Assignments"](#)
- [Section 15.2, "Assigning a Sales Team Using Territory Manager"](#)
- [Section 15.3, "Overview of Sales Credit Allocation"](#)
- [Section 15.4, "Performing an Automatic Sales Credit Allocation"](#)
- [Section 15.5, "Performing a Manual Sales Credit Allocation"](#)
- [Section 15.6, "Overview of Projected Commission"](#)
- [Section 15.7, "Viewing Projected Commission Calculations for a Quote"](#)

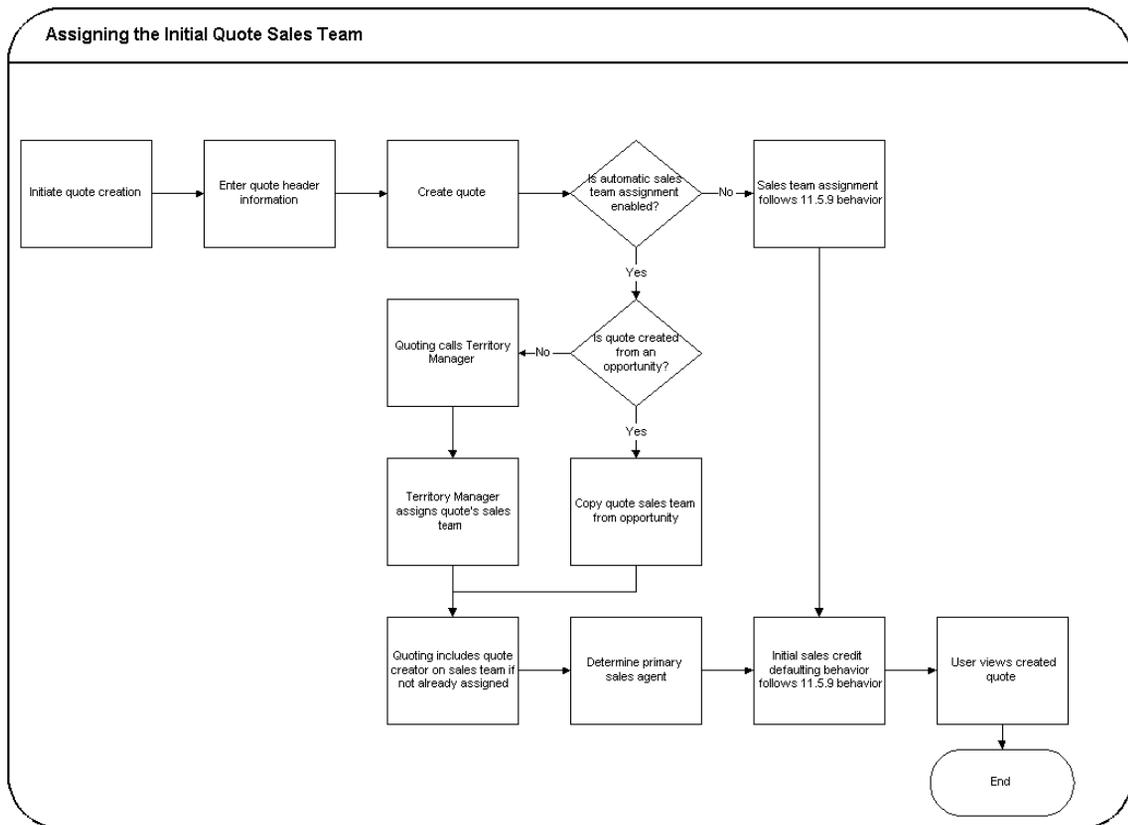
15.1 Overview of Sales Team Assignments

Integration with Oracle Territory Manager allows Quoting to ensure that the correct resources can access a quote. This integration is controlled by the profile option *ASO: Automatic Sales Team Assignment*. If set to *Partial*, Quoting calls Territory Manager to assign quotes sales teams at quote creation, and on user request. If set to *Full*, Quoting calls Territory Manager to assign quote sales team at quote creation, order submission, and on user request.

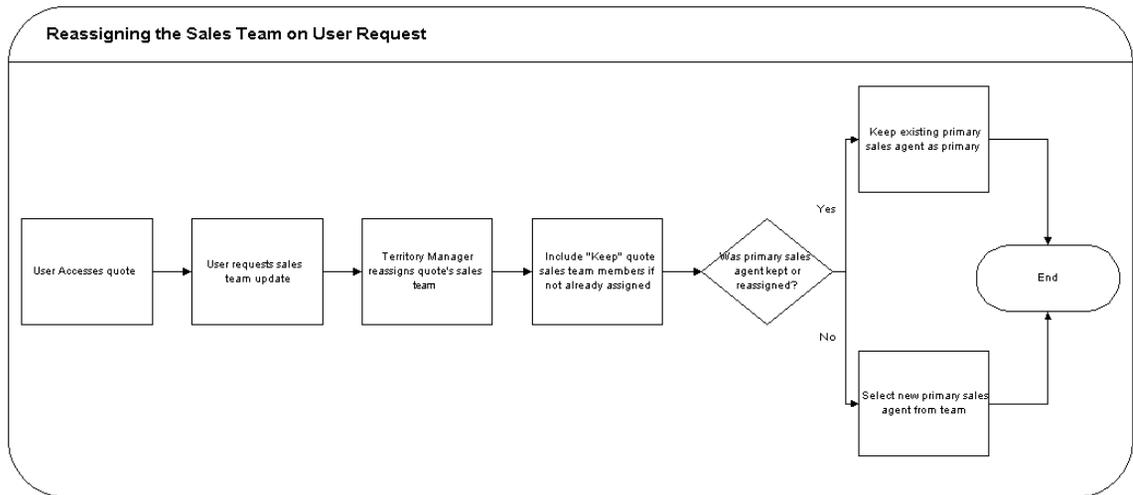
Note: If this profile option is set to either *Full* or *Partial* and sales credit allocation is enabled, Quoting calls Territory Manager for sales team assignments when a user requests a sales credit update.

Sales teams and territories are set up in Oracle Territory Manager. 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 as well as customers and geography.

Quoting then uses these territories to derive sales teams for quotes. The following diagram shows how Quoting determines the initial quote sales team.



The following diagram shows how Quoting assigns the sales team upon user request.



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

- Resource
- Group
- Role — Only appears in the UI if Automatic Sales Credit Allocation is enabled
- Territory ID — Territory ID does not appear in the UI. It is only stored in the database for reporting purposes.
- 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.

Keep Flag

The Keep Flag indicates whether a resource will be preserved on the sales team during sales team assignment. Any resource without the Keep Flag enabled will only remain on the quote sales team if the Territory Manager reassigns them. This includes the quote creator and primary salesperson. Additionally, if the Keep flag is selected for a resource on the sales team, the Full Access flag, role, and group will also not change based on Territory Manager settings.

Primary Salesperson Assignment

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

- If the quote creator is a valid sales representative, the quote creator becomes the primary salesperson.
- If the quote creator is not a valid sales representative, the primary salesperson is selected randomly from valid sales representatives on the team with full access.
- If there are no valid sales representatives on the sales team with full access, the primary salesperson 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 salesperson is removed from the sales team during automatic sales team reassignment, a new primary salesperson 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 the criteria, the primary salesperson is defaulted from *ASO: Default Salesrep*.

15.2 Assigning a Sales Team Using Territory Manager

Depending on the value set for the profile option *ASO: Automatic Sales Team Assignment*, the sales team assignment process can be automatically triggered. Refer to [Section 15.1, "Overview of Sales Team Assignments"](#) for more information.

To manually call Territory Manager for sales team assignment:

Prerequisites

- *ASO: Automatic Sales Team Assignment* must be set to *Full* or *Partial*.
- The quote must be updateable.

- The user must have update access to the quote.

Navigation

Quoting > Sales Team

Steps

1. Click **Reassign Team**.
2. Quoting calls Territory Manager, which updates the sales team resources and their information.

If Territory Manager does not assign valid resources for the sales team, the quote sales team will not be updated. It will remain the same as it was before the reassignment request.

15.3 Overview of Sales Credit Allocation

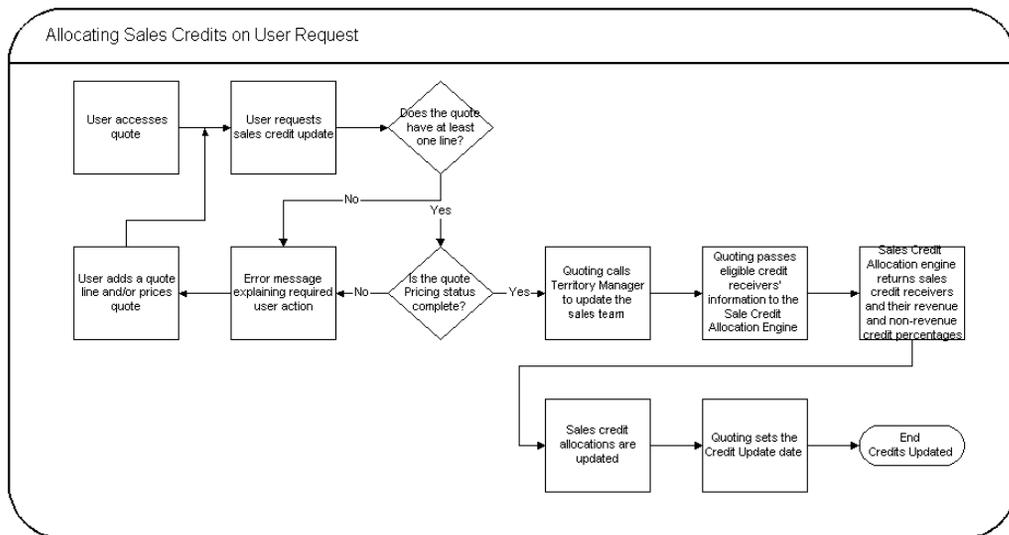
Through integration with Oracle Incentive Compensation (OIC) or another sales credit allocation engine, you can automatically determine sales credit allocations for quotes. After updating the sales team using Oracle Territory Manager, Quoting will pass the sales representatives and their roles to the sales credit allocation engine. The sales credit allocation engine then returns the allocations based on administrator-defined rules.

Note: You can choose to implement this functionality using an alternate sales credit allocation engine. See the *Oracle Quoting Implementation Guide* for more information.

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 the *Oracle Quoting Implementation Guide* for more information.

Note: Sales Credit Allocation must be used in conjunction with Automatic Sales Team Assignment. Therefore, if *ASO: Automatic Sales Credit Allocation* is set to *Full* or *Partial*, then *ASO: Automatic Sales Team Assignment* must also be set to *Full* or *Partial*.

It is particularly important that sales credit allocations are correct when an order is placed. Therefore, you can enable Quoting to automatically call the sales credit allocation engine when you attempt to submit an order.



Depending on setup, sales credit allocation takes place either 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 the sales credit allocation engine. The sales credit allocation engine determines the credit distribution. The quote is then updated with this distribution.

Eligible Sales Credit Receivers

To be eligible to receive sales credit allocations, a resource must:

- Be a valid sales representative
- Be on the quote's sales team
- Have a specified role on the team

Note: Only roles of role type Sales, TeleSales, Field Sales, or Partners Relationship Management can be specified on the sales team.

You can manually enter sales credit information for sales representatives that do not meet these criteria. See [Section 14.2, "Adding a Resource to the Quote Sales Team"](#) for more information.

Once Quoting has determined which sales representatives are eligible, it passes the resources and roles to sales credit allocation engine. In turn, the sales credit allocation engine returns the following information for each receiver:

- Resource
- Revenue Type
- Credit Allocation Percentage

If the sales credit allocation engine 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 you are using the OIC sales credit allocation engine, this may happen when the OIC profile option **Total Rev% is not 100** is set to **No Operation**. This profile can also be set to the following values:

- Even distribution — The remaining revenue percentage will be distributed evenly among the existing sales roles
- Weighted Average — The remaining revenue percentage will be based on a weighted average
- Custom — Custom code can be added

If the sales credit allocation engine returns revenue credits totalling 0% or null, Quoting will not uptake the transaction's credits. 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.

15.4 Performing an Automatic Sales Credit Allocation

To perform a sales credit allocation:

Prerequisites

- *ASO: Automatic Sales Credit Allocation* must be set to *Partial* or *Full*

- *ASO: Automatic Sales Team Assignment* must be set to *Partial* or *Full*
- The quote must have at least one line
- The Pricing Status must be *Complete*
- The quote must have a Primary Salesperson
- To allocate sales credits per line, *ASO: Run Sales Credit Update for Quote Lines* must be set to *Yes*.
- The user has Update access and the quote is updateable.

Navigation

Quoting > Overview

Steps

1. Select **Actions > Update Sales Credits**.

After the sales credit allocation engine returns the credit receiver information, the credit update date is stored and displayed in the UI.

15.5 Performing a Manual Sales Credit Allocation

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

Automatic sales credit allocation does not need to be enabled to enter manual sales credits. Yet, you can still enter manual sales credits if automatic sales credit allocation is enabled.

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.

Prerequisites

- The resource for allocation of sales credits must be set up in Oracle Receivables as a valid sales representative.
- If allocating line level sales credits, the line for which you want to allocate must be selected.

- *ASO: Modify Sales Credits* must be set to *Yes*, or *Partial* (and the user is the current group's manager). Otherwise sales credits are read-only.

Navigation

Quoting > Sales Credits

Quoting > Lines > Actions > Assign Sales Credits

Notes

- If you do not specify a header level sales credit, it will default 100% to the primary salesperson.
If you do not specify a line level sales credit, the existing header level sales credit is assigned to the line by default.
If you assign a sales credit to a line and exit without selecting **Apply**, the header level sales credit is defaulted into the line.
However, once you assign a line level sales credit and select **Apply**, the header level sales credit information no longer applies.
- The sum of the allocations of revenue sales credit types must equal 100% in a quote, at header and line level.

Steps

1. Determine if sales credit are revenue or non-revenue.
2. In the corresponding section, search for and select a sales representative.
 - If revenue sales credits, choose a revenue credit type and enter a percentage.
 - If non-revenue sales credits, choose a non-revenue credit type and enter a percentage.

15.6 Overview of Projected Commission

Note: You cannot use projected commission functionality unless sales team assignment and sales credit allocation are enabled. *ASO: Automatic Sales Team Assignment* must be set to *Full* or *Partial* and *ASO: Automatic Sales Credit Allocation* must be set to *Full* or *Partial*.

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

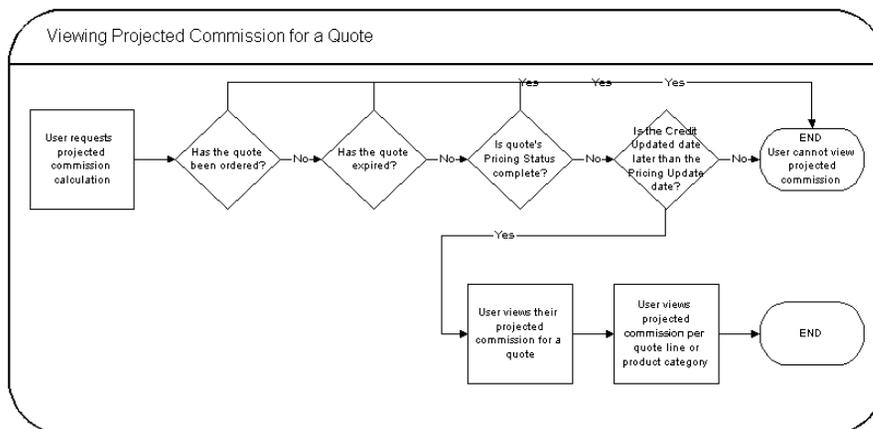
- An entire quote
- Each quote line
- Each product category

This information is useful, as the ability to view projected commissions can help to motivate sales representatives and encourage them to sell more and to sell particular products.

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



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.

15.7 Viewing Projected Commission Calculations for a Quote

To view projected commission for a quote:

Prerequisites

- *ASO: Calculate Projected Commission* is set to *Yes*
- *ASO: Automatic Sales Credit Allocation* is set to *Full* or *Partial*
- *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*
- The quote is in the highest version
- The quote is not in the *Order Submitted* status
- The quote is not expired
- The quote Pricing Status is *Complete*
- The Credit Update Date is later than the Pricing Update Date

Navigation

Quoting > Overview

Steps

1. Click **Actions > View Commission**.

Quoting calls Oracle Incentive Compensation (OIC) to calculate projected commissions. OIC returns the commissions, and Quoting displays a summary with totals by product category and quote line.

Notes, Tasks, and Attachments

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

- [Section 16.1, "Overview of Notes, Tasks, and Attachments"](#)
- [Section 16.2, "Adding Notes to a Quote"](#)
- [Section 16.3, "Creating a Task"](#)
- [Section 16.4, "Modifying a Task"](#)
- [Section 16.5, "Creating an Attachment"](#)
- [Section 16.6, "Deleting an Attachment"](#)

16.1 Overview of Notes, Tasks, and Attachments

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

The following note types are seeded in Quoting:

- Sales Assistance

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

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

16.2 Adding Notes to a Quote

To create notes for a quote:

Navigation

Quoting > Notes > Create Note

Field Behavior

- More button

Selecting this button allows you to add additional text, beyond the character limit, to your note

Note: User will no longer be able to see the notes automatically whenever:

- Notes are copied from an existing Quote to a New Quote Version (FORMS AND HTML UI)
- Notes are copied from an opportunity (FORMS AND HTML UI)

In the above mentioned cases, the user has to explicitly query to see those notes. To view these notes without explicitly executing a query in Quoting UI, the user has an option to apply ATG Notes component patch B (2673637).

16.3 Creating a Task

To create a task:

Navigation

Quoting > Tasks

Steps

1. Fill out the Create Tasks form as described in the *Oracle CRM Application Foundation Concepts and Procedures*.

16.4 Modifying a Task

To modify a task:

Navigation

Quoting > Tasks

Field Behavior

Clicking on the linked task number displays task details.

16.5 Creating an Attachment

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

To create an attachment:

Prerequisites

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

Navigation

Quoting > Attachments

16.6 Deleting an Attachment

To remove an attachment from a quote:

Prerequisites

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

Navigation

Quoting > Attachments

Publishing and Printing

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

- [Section 17.1, "Overview of Printing"](#)
- [Section 17.2, "Printing a Quote"](#)
- [Section 17.3, "Overview of Publishing Quotes"](#)
- [Section 17.4, "Web Publishing a Quote"](#)

17.1 Overview of Printing

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

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

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

- Quote information — Quote number, revision, date, expiration date, header level payment term, Printed tax name and tax rate
- Customer information — Customer name, address, email address, and phone number; ship-to customer name, address, and phone number; bill to customer name, address, and phone number
- Pricing Agreement information — Agreement name, number, revision, and revision date

- Line information — Product number and description, UOM, Qty, Unit Net Price, Total Net Price, Sales Tax, Configurations for model products, Total price for model products, Charges
- Attachments — Text type header attachments that are associated with the document category **Miscellaneous**
- Charges — A summary of charges for entire quote
- Tax — A summary of tax charges, including tax code and tax rate
- Sales Supplement — Header and line level sales supplement details including template name, sections, components, and component responses
- Contract Information — Contract Terms for a contract associated with the quote

Note: Contract information is only available on the Print Quote report if Sales Contracts integration is enabled and *ASO: Print Method* is set to *XML Publisher* and a valid contract template is associated with the quote.

The following information is added if the quote is executable:

- Signature block

There are two options available when implementing the printing functionality in Quoting. The default, Oracle Reports 6i, allows you to choose between two output formats: PDF format or Rich Text Format (RTF). If the alternative method, Oracle XML Publisher, is selected, you can only print in PDF format.

If using the Oracle Reports 6i printing solution, there are templates available from which you can choose the print quote layout. The seeded option is **Default Print Layout**.

If using the XML Publisher printing solution, the print layout defaults based on the value defined in the profile option *ASO: Default Layout Template*.

17.2 Printing a Quote

To print a quote:

Prerequisites

The highest version of the quote must be used.

Navigation

Quoting > Overview > Actions > Print Quote

Notes

Depending on your browser, either a browser window opens displaying the printout or you are asked to open or save the printout. If you need a paper copy of the quote, choose your browser's Print option to print the report.

Field Behavior

- **Output Format**

If using Oracle Reports 6i, the seeded output formats are: PDF format or Rich Text Format (RTF). If using XML Publisher, you can only print in PDF format.
- **Show Price Adjustments**

If checked, price adjustments and list prices will print.
- **Show Charges**

If checked, charges details appear on the quote printout. If unchecked, charges details are not printed but, total charges are displayed in the Subtotal section of the printout
- **Show subtotal by product category**

If checked, the subtotal for each product category will be printed at the end of the report. Use product categories belonging to the default category set for the Order Management functional area.
- **Template**

If using Oracle Reports 6i, the seeded default template is Default Print Layout. Values sourced from Order Capture lookup ASO_PQUOTE_TEMPLATES.

If using XML Publisher, the seeded default template defaults from the profile option ASO: *Default Layout Template*.
- **Show Header Attachments**

Enabled if ASO: *Print Quote Show Attachments* is Yes. If enabled, it should be unchecked by default.

If checked, all header level Text type attachments in the Miscellaneous document category will print.
- **Show Header Sales Supplement**

Displayed if *ASO: Enable Sales Supplement* is set to *Yes*.

- Show Line Sales Supplement

Displayed if *ASO: Enable Sales Supplement* is set to *Yes*.

17.3 Overview of Publishing Quotes

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

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

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

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

17.4 Web Publishing a Quote

To web publish a quote:

Prerequisites

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

Navigation

Quoting > Overview > Actions > Web Publish

Notes

- If the customer is not an FND_USER, you will be prompted to enter a User Name. The system auto generates a password and creates an FND_USER for the customer. This information is then emailed to the customer.
- The Specialty Store ID is stored in the quote header.

Field Behavior

- Username
If mandatory text field appears, the quote-to customer is not an FND_USER.
Appears as read only when the quote-to customer is an FND_USER.
- Web Publish In
Lists all specialty stores in which the quote version is eligible to be published.
Defaults to the Specialty Store ID stored in the quote header, if one exists.
- Send Email To: Existing Address
Values are all email addresses for the sold-to contact and sold-to customer.
Disappears if there are no email addresses.

17.4.1 Unpublishing a Quote

To unpublish a previously published quote:

Prerequisites

- *ASO: Enable Web Publishing* must be set to *Yes* at the appropriate level.

- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote is not in Ordered or Inactive status.

Navigation

Quoting > Overview > Actions > Web Unpublish

Placing Orders

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

- [Section 18.1, "Overview of Placing Orders"](#)
- [Section 18.2, "Placing an Order"](#)

18.1 Overview of Placing Orders

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

18.2 Placing an Order

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

To place an order:

Prerequisites

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

Navigation

Quoting > Overview > Actions > Place Order

Notes

- Once an order is placed, the order number appears as a hyperlink on the Overview page. Clicking this link displays order details. You can also use this order number to search for the order in Oracle Order Management.
- A quote does not reprice upon submitting a quote. It will reprice when you add another item, or update a quantity. If an item on a quote becomes inactive on a price list, the quote can still be submitted.

Part III

User Procedures - Forms

This part contains the following chapters:

- Chapter 19, "Using Folder Functionality"
- Chapter 20, "Creating Quotes"
- Chapter 21, "Using Templates"
- Chapter 22, "Searching"
- Chapter 23, "Credit Checks"
- Chapter 24, "Pricing Products and Quotes"
- Chapter 25, "Customers and Relationships"
- Chapter 26, "Entering Address and Payment Information"
- Chapter 27, "Modifying Quotes"
- Chapter 28, "Copying Quotes"
- Chapter 29, "Initiating Approvals"
- Chapter 30, "Negotiating Contract Terms on Quotes"
- Chapter 31, "Enabling Quoting Security"
- Chapter 32, "Assigning Sales Teams and Allocating Sales Credits"
- Chapter 33, "Notes and Attachments"
- Chapter 34, "Publishing and Printing"
- Chapter 35, "Placing Orders"

Using Folder Functionality

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

- [Section 19.1, "Using Folder Functionality to Customize Forms"](#)

19.1 Using Folder Functionality to Customize Forms

Forms Quoting uses Oracle Applications Folder technology to allow users to customize the following forms:

- Quote Customer Search
- Quote Search
- Quote Header
- Quote Lines
- Sales Team
- Price Adjustments
- Adjust Charges
- Trade-In Product

You can change fields in the following ways:

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

Once you make changes to an existing folder, you can save the changes to a new folder or the same folder.

Steps

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

19.1.1 Fields That Cannot be Hidden

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

Note: Users should not hide mandatory fields.

The following table lists fields in the each form that you cannot hide.

Table 19–1 Fields That Cannot be Hidden

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

Table 19–1 Fields That Cannot be Hidden

Form	Field
Quote Header > Payment, Shipping	Payment Type
Quote Header > Tax	Tax Handling
Quote Header > Tax	Tax Code
Quote Header > Tax	Amount
Quote Lines > Pricing	Line
Quote Lines > Pricing	Model Status
Quote Lines > Pricing	Product
Quote Lines > Pricing	Qty
Quote Lines > Pricing	UOM
Quote Lines > Bill To	Customer
Quote Lines > Ship To	Customer
Quote Lines > Shipping	Requested Date
Quote Lines > Service	Reference Type
Sales Team	Full Access
Sales Team	Name
Price Adjustments	Remove
Price Adjustments	Adjustment
Price Adjustments	Adjustment Group
Price Adjustments	Value
Price Adjustments > Details (Price Break Header)	Required Quantity
Price Adjustments > Details (Price Break Header)	Adjustment Value
Price Adjustments > Details (for a Promotional Good - qualifying item)	Line
Price Adjustments > Details (for a Promotional Good - qualifying item)	Promotional Product
Price Adjustments > Details (for a Promotional Good - promotional item)	Line

Table 19–1 Fields That Cannot be Hidden

Form	Field
Price Adjustments > Details (for a Promotional Good - promotional item)	Qualifying Product
Price Adjustments > Details (for an Other Item Discount - qualifying item)	Line
Price Adjustments > Details (for an Other Item Discount - qualifying item)	Discounted Product
Price Adjustments > Details (for an Other Item Discount - discounted item)	Line
Price Adjustments > Details (for an Other Item Discount - discounted item)	Qualifying Product
Adjust Charges	Charge
Adjust Charges	Charge Group
Adjust Charges	Value
Adjust Charges	Charge Amount
Trade In Product	Category
Trade In Product	Product
Trade In Product	Description
Service Reference	Category
Service Reference	Product
Service Reference	Description

Creating Quotes

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

- [Section 20.1, "Overview of Creating Quotes"](#)
- [Section 20.2, "Creating a Quote"](#)
- [Section 20.3, "Creating a Quote From an Opportunity"](#)

20.1 Overview of Creating Quotes

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

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

When you create a quote, you must initially specify:

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

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

Quote number, customer, and customer account (if specified) cannot be changed after quote creation.

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

20.1.1 Understanding Quotes

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

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

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

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

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

Oracle Quoting keeps a list of all of the quote versions you have created. You can view general information about all previous quotes for the customer. You can also

view the history of the current quote. In the Oracle Quoting main form, you can modify only the latest version of a quote. Previous versions of a quote are *read-only*; you can neither modify the quote from the user interface nor change the quote status. However, in the Forms UI you can use the Copy Quote functionality to create a new quote version from a previous quote version if all the following conditions are met:

- The highest quote version is not in the *Order Submitted* status
- The highest quote version is not in *Approval Pending* status
- The quote is not submitted for batch pricing

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

20.1.2 Quote Status

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

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

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

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

20.1.2.1 Pre-Defined Quote Statuses

The following table shows the available seeded quote statuses.

Table 20–1 Predefined Quote Statuses

Quote Status	Description	Read-only
Approval Canceled	Sales representative canceled the approval process.	No
Approval Pending	Quote is pending approval.	Yes
Approval Rejected	Approval was rejected by the approvers.	No
Approved	Approved by the approvers.	Yes
Draft	Initial status.	No
Inactive	No more activity allowed.	Yes
Order Submitted	Order submitted to Oracle Order Management.	Yes
StoreDraft	For iStore internal use only.	No

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

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

Note: The statuses *Ordered*, *Entered*, *Contract Canceled*, *Contract Pending*, and *Contract Required* 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 will you have the ability to enable them.

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

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

Note: A user can fully update a quote in read-only status if the system administrator sets the profile option *ASO: Status Override* to *Yes* for that specific user. Yet, even if the profile is set to *Yes*, the user must have update access to the quote to be able to modify it.

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

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

20.1.2.2 Rules for Quote Status Changes

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

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

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

Table 20–2 Seeded Quote Status Transitions

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

Table 20–2 Seeded Quote Status Transitions

From	To	User Maintainable
StoreDraft	Draft	No
StoreDraft	Inactive	No
StoreDraft	Order Submitted	No

20.2 Creating a Quote

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

The behavior of the Customer and Account LOVs in the header depends upon the *ASO: Auto Account Creation* profile option setting. See [Section 25.1.1, "Customer Data"](#) for more information.

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

You must enter the following information to create a quote:

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

To create a quote:

Navigation

Quoting > Main Quoting form

Field Behavior

- Quote Name

The Quote Name will be populated with **Quote for <Customer>** if it is not specified.
- Customer

The customer cannot be changed once the quote is created.

If *ASO: Auto Account Creation* is set to *Always* and the party does not have an account, the account will be created when the quote is created. If *ASO: View Customer Without Accounts* is set to *Yes*, the LOV displays all parties with or without accounts. If set to *No*, the LOV displays only parties with accounts. For more information on these profiles, see the *Oracle Quoting Implementation Guide*.
- Contact

This LOV displays all parties of type *Person* with a valid party relationship with the quote-to customer. Disabled if the quote-to customer is of type *Person*.
- Quote Number

If *ASO: Automatic Numbering* is set to *Yes*, Oracle Quoting automatically assigns a number to the quote. If set to *No*, the user must manually enter a value in this field.
- Account

This field automatically populates when you select the customer.

If the customer does not have an account number, one is created based on the setting of the profile option *ASO: Auto Account Creation*. See [Chapter 25, "Customers and Relationships"](#) for more information.

If the customer is not specified, the user can use the Account LOV to select the Quote To customer and account. The Quote to customer will be copied to the Customer field.
- Quote Status

This field is automatically populated by Oracle Quoting, according to the profile option *ASO: Default Quote Status*.
- Order Type

This field is automatically populated with the value from the profile option *ASO: Default Order Type*.

- Salesperson

This field is automatically populated with the current user if the user is set up as a valid salesperson. If not, the field defaults to the sales representative designated in *ASO: Default Salesrep*.

If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*, this field is read only without defaulted values.

- Contract Template

A default contract is defaulted from the profile option *ASO: Default Contract Template*. This field is only enabled if the profile *OKC: Enable Sales Contracts* is set to *Yes*.

Notes

Upon saving, the application generates a quote number that is displayed in the Quote Number field.

20.2.1 Selecting an Existing Customer in the Oracle Quoting Form

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

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

Prerequisites

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

Field Behavior

- Customer LOV

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

- Account LOV
Oracle Quoting automatically populates the Account field when you select the Customer. The LOV displays all active accounts for the selected customer.
 - If no account exists, one may be created for the customer based on the setting of the profile option *ASO: Auto Account Creation*. See [Section 25.1.2, "Creation of Accounts"](#) for more information.
 - If no customer was selected, the LOV displays all accounts and their related parties.
- Contact
The LOV displays all parties of type *Person* that have a party relationship with the customer.

20.3 Creating a Quote From an Opportunity

To create a quote from an opportunity:

Prerequisites

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

Navigation

Oracle TeleSales > eBusiness Center > Opportunity

Notes

The following fields, when available, are defaulted and cannot be changed:

- Customer Name
- Quote Number (if *ASO: Automatic Numbering* is set to *No*)
- Opportunity Name
- Salesperson (If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*)
- Sales Group (If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*)

Steps

1. Select the opportunity you wish to use and select **Create Quote**. The Create Quote From Opportunity form is your pathway into Quoting.

The information that you enter on this form will appear in the Quoting UI once you click **Create Quote**.

Using Templates

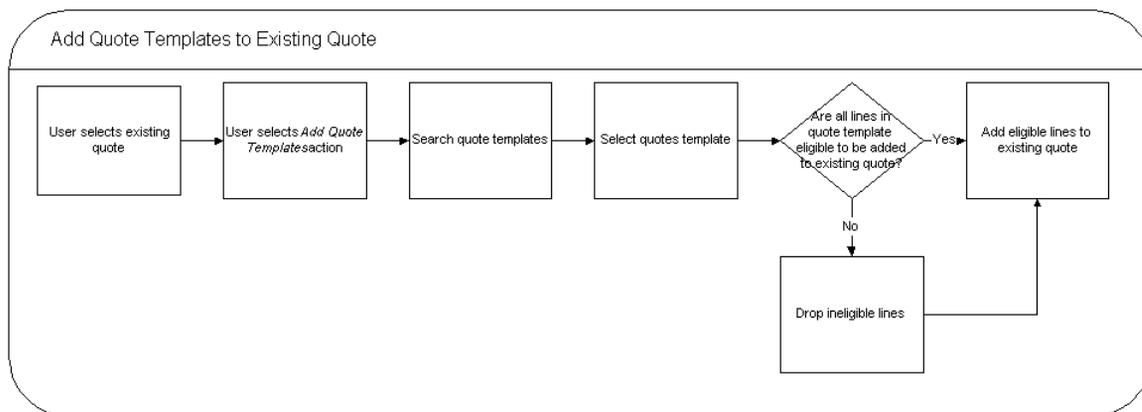
This section outlines the use of templates in Oracle Quoting.

- [Section 21.1, "Overview of Templates"](#)
- [Section 21.2, "Adding a Template to an Existing Quote"](#)

21.1 Overview of Templates

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

In the Forms UI, you can search for and add these predefined templates to an existing quote.



21.2 Adding a Template to an Existing Quote

To add a quote template to an existing quote:

Prerequisites

- The quote must not be in a read-only status.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote must not be submitted for batch processing.
- Quote templates must be set up in Quoting's HTML UI.

Navigation

Quoting > Actions > Add Quote Templates (Header)

Quoting > Quote Lines > Actions > Add Quote Templates (Line)

Notes

- In the Results section, you can multi-select contiguously by holding down the Shift key, or non-contiguously by holding down the Control key.
- The Template Details table is a child table of the Results table. It displays the line details of the line selected in the Results table. If multiple lines are selected, it the Template Details table displays details for the *current* line.

Steps

1. Search for and select a quote template(s). Click **Apply** to add to the quote.

Once added to the quote, the products in the quote template(s) appear as quote lines.

This section contains information on performing searches in Oracle Quoting.

- [Section 22.1, "Searching Using the Query Method"](#)
- [Section 22.2, "Searching for Quotes"](#)
- [Section 22.3, "Searching for Customers"](#)
- [Section 22.4, "Using interMedia Search"](#)

22.1 Searching Using the Query Method

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

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

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

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

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

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

To search using the query method:

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

Prerequisites

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

Steps

1. Select **View > Query by Example > Enter**. The color of the searchable fields changes to blue.
2. Enter a full or partial value into one of the fields. You can use the wildcard %.
3. Select **View > Query by Example > Run**.
The application displays a matching entry, if any.
4. Check the status bar to see how many matching entries were found. If the application found more than one matching entry, then place the cursor in any field and use the down arrow on the keyboard to scroll through.

22.2 Searching for Quotes

You can search for quotes using a variety of criteria.

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

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

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

Note: The Quote Number field cannot be hidden.

22.2.1 Basic Search

To search for quotes:

Navigation

Quoting > Quote Search > Basic

Notes

- You can access the Quote Search from the Quoting forms in any of the following ways:
 - Select **View > Find**.
 - Select the flashlight icon
- You cannot specify leading wildcard characters ('%', '_') in the search criteria.
- The maximum number of results in the LOVs for the customer and account in the Basic Search form is limited by the profile option *ASO: Max Number of Results*.

22.2.2 Advanced Search

To search for quote:

Navigation

Quoting > Quote Search >Advanced

Notes

- You can access the Quote Search from the Quoting forms in any of the following ways:
 - Select **View > Find**.
 - Select the flashlight icon
- You cannot specify leading wildcard characters ('%', '_') in the search criteria.

22.3 Searching for Customers

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

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

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

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

22.3.1 Searching for a Customer

To search for an organization:

Navigation

Quoting > Customer Search

Notes

- You can access the Customer Search from the Quoting forms in any of the following ways:
 - Select **View > Find**.
 - Select the flashlight icon
- The Customer Search form allows you to designate whether the search is for customers of type *Organization* or type *Person*.
- To execute a search, you must enter a value in at least one field.
- The search results display a Registry ID for each customer. The Registry ID, a unique party identifier in TCA, is also known as the Party Number.

22.4 Using interMedia Search

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

- Part Number
- Description
- Long Description

The following characters are treated as literal characters when performing an interMedia search:

- \
- ,
- &
- (
-)
- ?
- }
-]
- {
- [

- -
- ~
- |
- \$
- !
- >

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

Credit Checks

This section contains information about performing credit checks.

- [Section 23.1, "Overview of Credit Checks"](#)
- [Section 23.2, "Performing a Credit Check"](#)

23.1 Overview of Credit Checks

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

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

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

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

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

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

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

23.2 Performing a Credit Check

To perform a credit check:

Prerequisites

- *ASO: Enable Credit Check* must be set to *Yes* at the appropriate level.
- The quote status must not be **Order Submitted**
- The quote must not be expired.
- The highest version of the quote must be used.
- The quote must not be submitted for batch pricing.
- There must be a designated Billing customer on the quote.
- The billing customer must have an account.
- There must be a billing address designated on the quote.
- Pricing and Tax Statuses must both be complete.

Navigation

Quoting > Actions > Initiate Credit Check

Notes

A pop-up window displays the results of the credit check. The results are not saved in the quote.

Pricing Products and Quotes

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

- [Section 24.1, "Overview of Pricing"](#)
- [Section 24.2, "Executing Manual Pricing and Tax Requests for a Quote"](#)
- [Section 24.3, "Pricing a Product"](#)
- [Section 24.4, "Applying Pricing Agreements"](#)
- [Section 24.5, "Applying Custom Pricing Attributes"](#)
- [Section 24.6, "Overriding Price Break Level Adjustments"](#)
- [Section 24.7, "Pricing Configurable Products"](#)
- [Section 24.8, "Applying Promotion Codes"](#)
- [Section 24.9, "Adjusting the Price of a Product in the Quoting Form"](#)
- [Section 24.10, "Applying a Non-Automatic Discount to a Product or the Entire Quote"](#)
- [Section 24.11, "Manually Adjusting Prices in the Price Adjustments Form"](#)
- [Section 24.12, "Freezing Prices for a Quote"](#)
- [Section 24.13, "Applying Non-Automatic Charges"](#)
- [Section 24.14, "Overriding Charge Values"](#)

24.1 Overview of Pricing

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

Start and End (Expiration) Dates

For pricing elements with effectivity dates, Quoting will behave as follows:

- For a start or beginning date, effectivity begins at the beginning of the specified date (12:00 a.m.)
- For an end or expiration date, effectivity ends at the end of the specified date (11:59:59 p.m.)

24.1.1 Price Lists

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

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

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

- Agreement
- Quote-to-Customer
- Order Type

Multi-Currency Price Lists

Multi-currency price lists simplify pricing setup if you are selling products to customers in multiple countries.

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.

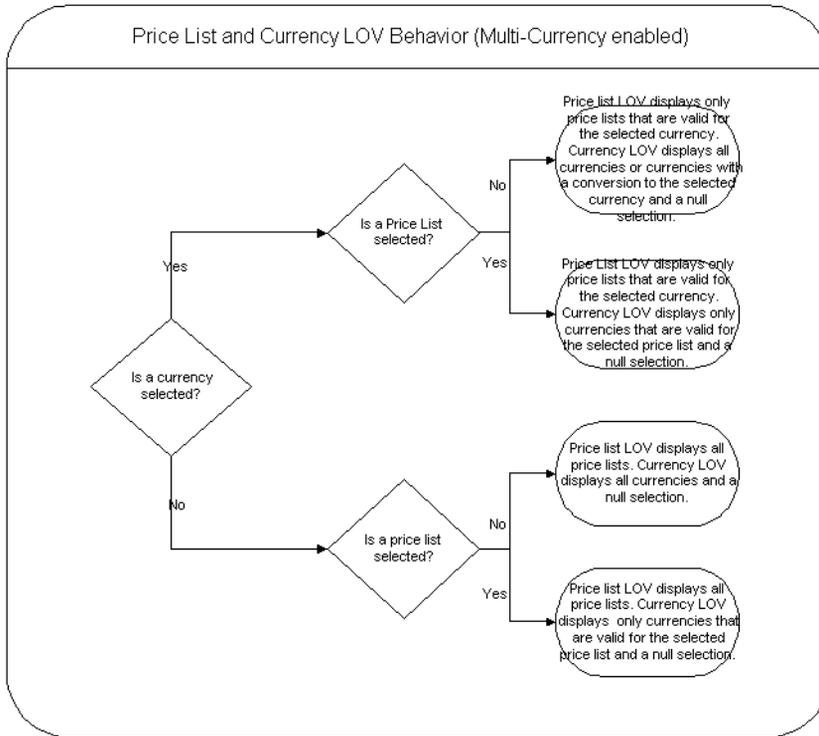
The use of multi-currency price lists is controlled by the profile options QP: Multi-Currency Installed and QP: Multi-Currency Usages. If QP: Multi-Currency Installed is set to Yes, Quoting shows all price lists with the selected currency as base currency, as well as all price lists where there is a 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. QP: Multi-Currency Usages should be set to Yes at the application or responsibility level.

Note: You should not try to disable multi-currency price list functionality, by setting the multi-currency price list profile option back to *No*. See the Oracle Quoting Implementation Guide and the Oracle Advanced Pricing Implementation Guide for more information.

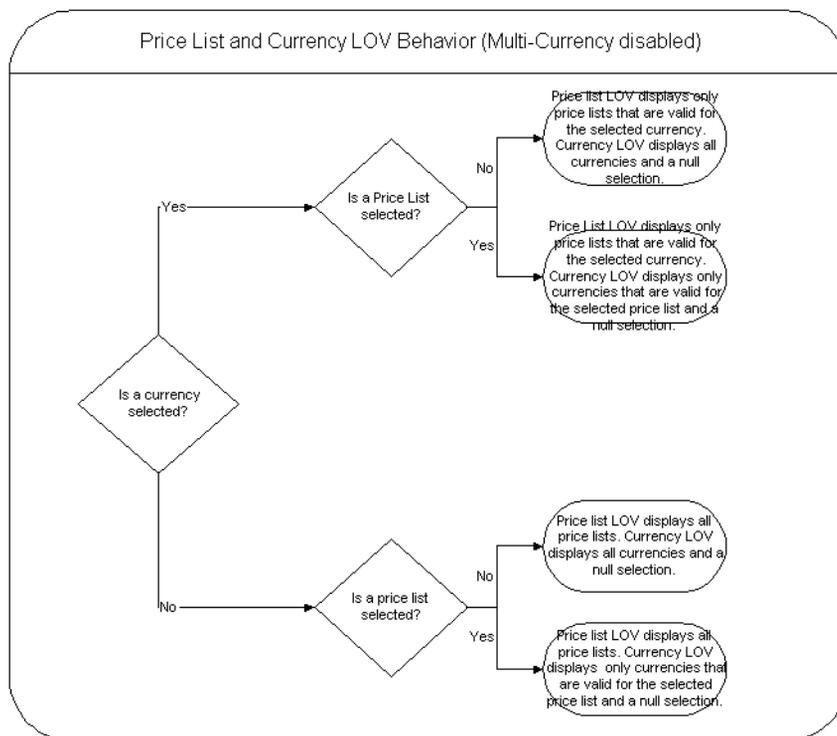
With multi-currency price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

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. If there is only one currency, the Currency LOV will be inactive. 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:



24.1.2 Custom Pricing Attributes

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

24.1.3 Charges

Charges are a supplemental cost associated with the purchase of a product or service. Charges are generally added to a quote when a task is being performed in conjunction with the product or service (for example, shipping fees or installation charges). In Quoting, charges consist of all freight and special charge modifiers applied to the quote. A sum of header level charges appear on the Summary tab of

the Quote Header. The Charges Summary form lists each charge and indicates if it is applied at the header or line level.

Note: If there are two modifiers with the same charge type, Pricing will apply the highest charge to the quote.

You can also view the charges for each line on the Lines page. If a line is selected when you access the Charges Summary page, it will display each charge applied to the line.

Within the Charges Summary form, you can add or remove non-automatic charges if *ASO: Discounting Privilege* is set to *Full* or *Partial* and you have update access to the quote. Additionally, you can override the charge value if *ASO: Discounting Privilege* is set to *Full* and you have update access.

24.1.4 Discounts

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

Example

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

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

24.1.5 Pricing Adjustments

Quoting is set up to display automatic adjustments (which are calculated in Oracle Advanced Pricing) applicable to the selected product and customer. You can also manually apply non-automatic adjustments, if *ASO: Discounting Privilege* is set to *Full* or *Partial* and you have update access to the quote. Additionally, you can override the adjustment value if *ASO: Discounting Privilege* is set to *Full* and you have update access.

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

Pricing Date

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

24.1.6 Manual Adjustments

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

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

24.1.7 Promotional Goods

A Promotional Good is a discounted or free product that is automatically added to the quote when a qualifying product (or products) are purchased. The modifier that contains the qualifying conditions is set up in Oracle Advanced Pricing. Refer to the *Oracle Quoting Implementation Guide* for setup restrictions.

For example, if a computer is the qualifying good and a mouse is the promotional good, when you add the computer to the quote, the mouse is added automatically. While the Unit List Price lists the actual price of the product if you were to purchase it, the Total Price for the line displays the promotional price. A promotional price is typically 0, but it can also be greater than 0

Note: The price of a promotional good can be greater than 0.

The price list for the line will be the price list set up for the promotional good in Oracle Advanced Pricing. If an agreement is associated with the promotional good, the agreement price list will not override the promotional good price list.

Additionally, once the promotional good is added to the quote, you will not be able to change the quantity, UOM, or price list.

Note: There can be multiple promotional goods for a qualifying item.

If the qualifying good is deleted from the quote, the promotional good is automatically deleted as well. If there are multiple qualifying goods and one is deleted, the promotional good will be removed.

Note: A promotional good is always added as the last item on a quote. There is no special line ordering for promotional goods.

Behavior

If a promotional good is included on the quote, you can:

- View Related Items
- Perform Trade ins - You can search the customer's installed base and select a promotional good as a trade-in. Although the customer received the item for a promotional price or for free, the trade-in is priced according to the rules set up in Advanced Pricing.

24.1.8 Terms Substitution

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

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

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

To ensure that a particular terms substitution modifier is applied, the pricing administrator 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.

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

24.2 Executing Manual Pricing and Tax Requests for a Quote

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

- Sales credits changes
- Attachments changes
- Notes changes
- Initiate/Cancel Approvals
- Sales Team changes
- Web Publish or Unpublish
- Initiate Credit Check
- System driven quote status changes
- Place Order

If the profile option *ASO: Calculate Price* is set to *Manual*, you can choose when to calculate prices and tax for the quote. You can also choose to calculate tax manually by setting *ASO: Calculate Tax* to *Manual*. Depending on the setting of *ASO: Enable Batch Processing* you can choose to price the quote interactively or through a batch request. See the *Oracle Quoting Implementation Guide* for more information.

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

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

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

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

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

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

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

- Submit a quote for approval
- Approve a quote
- Web publish a quote
- Initiate a credit check
- Print a quote
- Place an order

To manually price a quote:

Prerequisites

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

- The user has Update access to the quote.
- The quote has not been submitted for batch pricing.

Navigation

Quoting > Price Quote

Notes

- If *ASO: Calculate Price is Automatic* AND *ASO: Calculate Tax is Automatic* AND *ASO: Enable Batch Processing is No*, and you select **Price Quote**, the Price Quote form will not be shown but the quote will be priced. For any other combination of these three profiles, the Price Quote page is displayed.
- If you have *ASO: Enable Batch Processing* set to *Yes*, you will have two options for pricing the quote: *Now* or *Submit pricing request and notify me when it is complete*. If *ASO: Enable Batch Processing* is set to *No*, these options are not available and the application defaults to *Now*. See the *Oracle Quoting Implementation Guide* for more information.

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

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

24.2.1 Viewing Details of the Pricing Request

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

To view pricing request details:

Prerequisites

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

- The quote has been submitted for batch pricing.

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

Navigation

Quoting > Actions > Pricing Request Details

24.2.2 Canceling a Pricing Request

To cancel a pricing request:

Prerequisites

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

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

Navigation

Quoting > Actions > Cancel Pricing Request

24.3 Pricing a Product

To price a product in the Lines tab:

Navigation

Quoting > Lines

Notes

The product pricing appears when you tab out of the Price List field. The Unit List Price shows the list price of this product from the price list displayed in the Price List field. The Unit Adjustment field shows all adjustments on the line. The Unit %

Adj shows the percentage of the adjustments on the line. The Unit Selling Price shows the selling price per unit. The Total Price shows the total price for a product.

You are now ready to:

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

24.4 Applying Pricing Agreements

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

When creating a quote, you can select an applicable pricing agreement. For an existing quote you can select a pricing agreement in the Quote Header. You can also select agreements at the line level. If a line level agreement is selected, the line price list defaults from the selected agreement.

The Agreement LOVs display all agreements in all currencies set up for the selected sold-to customer and all agreements in all currencies with no customer specified and for the related customers.

Agreements and Currency

If the price list associated with the header level agreement has a different currency than what is currently selected on the quote or there is no conversion to the currency on the quote, the agreement price list will be defaulted and the currency will be changed to the base currency for the price list.

If the price list associated with the line level agreement is of a different currency than what is currently selected on the quote or there is no conversion to the currency on the quote, the price list will not be defaulted. The price list will default to null.

The price list for both header and line level will be defaulted if the quote currency is the same as the price list currency or there exists a conversion to that currency.

Prerequisites

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

24.5 Applying Custom Pricing Attributes

To apply custom pricing attributes:

Prerequisites

Pricing attributes must be set up in Oracle Advanced Pricing.

Navigation

Quoting > Actions > Promotions/Pricing Attributes (header)

Quoting > Quote Lines tab > Pricing Attributes (line)

Notes

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

To apply custom pricing attributes at the line level, place the cursor on a line in the Lines tab. Additionally, you can access line level pricing attributes using the Pricing Attributes button in the Quote Lines tab.
- If *ASO: Calculate Price* is set to *Automatic*, Quoting automatically reprices the product price(s) based on the pricing attributes.

24.6 Overriding Price Break Level Adjustments

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

To override a price break level adjustment:

Prerequisites

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

Navigation

Quoting > Quote Lines > Actions > Price Adjustments

Field Behavior

- Details

The Price Adjustments Details form displays the price break level records set up for the price break adjustment.

Steps

1. Highlight the price break adjustment on the Line Level Adjustments form and select **Details**.
2. To change the value of the adjustment, enter a new number in the Value field.
3. Enter a reason code and reason, and click OK.
4. Once back in the Price Adjustments form, you must click **Apply** for the changes to show up.

24.7 Pricing Configurable Products

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

To price configurable products:

Prerequisites

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

Navigation

Quoting > Lines

Notes

- List prices for each component are visible in the Configurator form.
- The total price for the configured model appears in the Line Total field in the Details section.

24.8 Applying Promotion Codes

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

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

Prerequisites

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

Navigation

Quoting > Actions (Header or Lines) > Promotions/Pricing Attributes

Notes

After selecting Apply in the Promotions form, the prices in the quote are repriced based on the promotion amount.

Field Behavior

- Level

Displays the level at which the promotion is applied. Available values, which are designated in Pricing, are *Order* and *Line*.

24.9 Adjusting the Price of a Product in the Quoting Form

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

There are two types of manual adjustments:

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

Repricing Rules

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

Table 24–1 Repricing Example

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

Manual adjustments include discounts and surcharges. To apply manual adjustments to a line.

Prerequisites

- The product intended for price adjustment must be added to the quote and displayed in the Quote Lines tab.
- Manual adjustments are possible if the *ASO: Discounting Privilege* profile option is set to *Full*. If it is set to *Partial* or *None* the Unit Selling Price field is read only.
- If the product is a promotional good, *ASO: Enable Promotional Good Price Override* must be set to *Yes*.

Steps

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

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

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

You can apply header and group of line level non-automatic adjustments from the header Price Adjustments form. If the adjustment is a header level percentage, it is applied to every line. If the adjustment is group of line level percentage or amount, it is applied to all lines that meet the qualifying criteria. You can also remove non-automatic adjustments in the Price Adjustments form.

Note: The header Price Adjustments form displays both header and line level adjustments.

You can apply or remove group of line and line level non-automatic adjustments from the line level Price Adjustment form. These adjustments are only applied to the current line. The Line level Price Adjustments form displays all adjustments applied to a line, including header, group or line, and line level adjustments.

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

Prerequisites

- A non-automatic discount must be set up in Oracle Pricing.
- *ASO: Discounting Privilege* is set to *Full* or *Partial*. Otherwise, the Price Adjustments form is read-only.

Navigation

Quoting > Actions > Price Adjustments

Notes

- To apply a non-automatic discount at the header level, place the cursor in the header of the Oracle Quoting form.

To apply a non-automatic discount at the line level, place the cursor in the Lines tab.

- To adjust the value of the price adjustment, see [Section 24.11, "Manually Adjusting Prices in the Price Adjustments Form"](#).
- Adjustments are sorted first by bucket, then by adjustment names within each bucket.

Field Behavior (Header or Line)

- Application Method
Application method selected for the modifier in Oracle Advanced Pricing. Header level adjustments all have the application method *Percent*. Possible values for line level adjustments are: *Amount*, *Percent*, or *Lumpsum*.
- Value
If header level adjustment, the actual value of the adjustment is displayed. In the Header Price Adjustments form, if line level or group of line level, this field is null, as the value may vary from line to line. In the Line Price Adjustments form, the line level value is always displayed
- Adjusted Amount
Displays the actual currency units that the line or order is adjusted by.
- Automatic
Indicates if the price adjustment is automatically applied. If checked, adjustments apply whenever the adjustment criteria is met. If not checked, this is a promotion applied manually via the Promotions form or a non-automatic adjustment. This flag is set depending on whether the adjustment is set up as *Automatic* or *Ask For* in the Oracle Pricing engine.
- Change Reason
This field is required if you manually change the automatic modifier value and optional if you manually change the manual modifier value.
- Details
Displays the detail page for the selected adjustment if the adjustment results from a Price Break, Promotional Good, Terms Substitution, or Other Item Discount modifier. If the adjustment results from a different type of modifier, the Price Adjustments Details forms displays only the Applicability tab. However, if there are also no applicability details, the form will not open.

The values in the Applicability tab are blank for modifiers with no attributes, qualifiers, or contexts.

24.11 Manually Adjusting Prices in the Price Adjustments Form

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

You can apply manual adjustments in the Price Adjustments form either at the header or line level, but you can only override the price of a header level adjustment in the header Price Adjustments form. You must override the price of the line level and group of line level adjustments in the Line level Price Adjustments form.

To manually override the adjustment value:

Prerequisites

ASO: Discounting Privilege is set to *Full*

Navigation

Quoting > Actions > Price Adjustments (header)

Quoting > Quote Lines > Actions > Price Adjustments (line)

Steps

1. Select an adjustment, if necessary, a non-automatic one, as described in [Section 24.10, "Applying a Non-Automatic Discount to a Product or the Entire Quote"](#).

You can also manually override price break adjustments. See [Section 24.6, "Overriding Price Break Level Adjustments"](#) for more information.

2. In the Value field for the adjustment you wish to override, type in the new adjustment value.

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

3. Enter a Reason Code and click **Apply**.

This field is required if you manually change the automatic modifier value and optional if you manually change the manual modifier value.

Note: If the user is allowed to manually change prices (i.e., *ASO: Discounting Privilege* is set to *Full*), the user should display this field in the form so that s/he can enter the change reason when required. Otherwise, if the user tries to place an order with a manual price override that does not have a change reason specified, an error will result.

24.12 Freezing Prices for a Quote

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

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

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

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

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

Prerequisites

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

Navigation

Quoting > Quote Header

Steps

1. Choose **Actions > Freeze Prices > OK**.

In the Summary section of the Quote Header tab, the Pricing Date field shows the current date. This date is used for all subsequent pricing calculations.

2. You can unfreeze prices, by choosing **Actions > Unfreeze Prices > OK**.

In the Summary section of the Quote Header tab, the Pricing Date field is cleared. The current date is used for all subsequent pricing calculations.

24.13 Applying Non-Automatic Charges

To apply non-automatic charges:

Prerequisites

- To apply non-automatic charges at the line level, you must select a line in the Quote Lines tab.
- *ASO: Discounting Privilege* must be set to *Full* or *Partial*

Navigation

Quoting > Actions > Adjust Charges (Header)

Quoting > Quote Lines > Actions > Adjust Charges (Line)

Field Behavior

- Charge
Displays all automatic charges and any manually applied non-automatic charges. You can remove non-automatic charges from this field.
- Charge Category
Displays the freight and special charge type as a concatenation of the Type and Sub-Type.
- Application Method
Application method selected for the modifier in Oracle Advanced Pricing. Header level adjustments all have the application method *Lumpsum*. Possible values for line level adjustments are: *Amount*, *Percent*, or *Lumpsum*.
- Value

If it is a header level charge, the actual value of the charge is displayed. In the header level form, if a line level charge, the Value is displayed as null, since it may vary between lines. In the line level form, the line-level charge value is always displayed.

- **Change Reason**

This field is required if an automatic charge is manually modified.

Notes

You cannot add or remove line level manual charges from the header level Charges Summary form or header level charges from the line level Charges Summary form.

24.14 Overriding Charge Values

To override charge values in the Charges Summary form:

Prerequisites

- To override charge values at the line level, you must select a line in the Quote Lines tab.
- *ASO: Discounting Privilege* must be set to *Full*

Notes

You can only override line-level charge values from the line level form and header-level charge values from the header level form.

Navigation

Quoting > Actions > Adjust Charges (Header)

Quoting > Quote Lines > Actions > Adjust Charges (Line)

Steps

1. Select the charge whose value you want to override. In the Value field, enter a new value and select **Apply**.

Customers and Relationships

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

- [Section 25.1, "Overview of Customers and Relationships"](#)
- [Section 25.2, "Creating a Customer"](#)

25.1 Overview of Customers and Relationships

There are two customer types in Oracle Quoting:

- Person
- Organization

Parties of type **Person** are individuals who are purchasing on their own behalf. Each person must have a primary address. A person can have multiple addresses and phone numbers.

Parties of type **Organization** may be a company, a company subsidiary or branch, an association, a non-profit, or a government branch. Each organization must have a primary address, yet can have multiple addresses and contacts associated with it. The address may belong to the organization or the contact.

A **Contact** represents an organization. Any individual at an organization can be your contact. Contacts within an organization are set up with roles such as *contact of* or *employee of*.

25.1.1 Customer Data

To create quotes and orders, certain standard customer information is necessary. The bill-to and ship-to information, which is optional when creating the quote, is mandatory when converting the quote into an order.

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

The following table shows the mapping of Oracle Quoting terminology to the Oracle Receivables (AR) Trading Community Architecture (TCA) terminology.

Location in UI	Quoting Terminology	AR Terminology (TCA)
Quote Header tab	Quote-to Customer, Quote-to Contact, Quote-to Address Note: The quote-to address is not passed into OM.	Sold-to Customer, Sold-to Contact
Addresses Section of the Quote Header tab	Ship-to Customer, Ship-to Contact, Ship-to Address	Ship-to Customer, Ship-to Contact, Ship-to Address
Addresses Section of the Quote Header tab	Bill-to Customer, Bill-to Contact, Bill-to Address	Bill-to Customer, Bill-to Contact, Bill-to Address

This customer data can be grouped into the following areas:

Quote-To Information:

- **Quote-To Customer** — The name and financial account of the customer. Sometimes only the name of the customer is known, as there may not be a financial account set up for them yet. The quote-to customer is financially responsible for the order; for example, credit and collections contact the quote-to customer if payment is not received.
- **Quote-To Contact** — A person representing the quote-to customer, only when the quote-to customer is of party type **Organization**. You cannot enter a contact if the Quote-To Customer is of type **Person**. Optional field.
- **Quote-To Address** — Address for the quote-to customer or quote-to contact. This address is used for mailing purposes. The Quote-to address is an optional

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

Bill-To Information:

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

Ship-To Information

- **Ship-to Customer** — The name and financial account information of the customer to whom the goods or services are delivered.
- **Ship-to Contact** — A person representing the shipping customer, only when the shipping customer is of party type **Organization**, who deals with all shipping related issues for the order, and who typically receives the shipment. Optional field.
- **Ship-to Address** — A physical location where the products are sent. The ship-to address can be associated with either the ship-to customer or ship-to contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the quote is saved.

25.1.2 Creation of Accounts

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

Note: If the customer does not have any active financial accounts, they will be treated as a prospect.

Oracle Quoting allows you to determine at which point an account is created. For more information on the following profile options, see the *Oracle Quoting Implementation Guide*

Account creation is based on the following profile options:

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

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

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

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

Table 25–1 Quoting Behavior Based on Profile Options

Profile Option Setting	Create Sold-To	Select Sold-To	Create Ship-To/ Bill-To	Select Ship-To/ Bill-To	Web Publishing	Order Conversion
<i>ASO: Auto Account Creation</i> set to <i>Always</i>	Create account	Create account if party does not have any	Create account	Create account if party does not have any	NA	NA
<i>ASO: Auto Account Creation</i> set to <i>As Required</i>	Do not create account	Do not create account	Do not create account	Do not create account	Create account for all customers in quote without account	Create account for all customers in quote without account

Table 25–1 Quoting Behavior Based on Profile Options

Profile Option Setting	Create Sold-To	Select Sold-To	Create Ship-To/ Bill-To	Select Ship-To/ Bill-To	Web Publishing	Order Conversion
<i>ASO: Auto Account Creation set to Place Order</i>	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 when the user saves a quote. In addition, each time a new party is created, an account is created as well.

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

- Web published
- The quote is converted into an order

If *ASO: Auto Account Creation* is set to *Place Order*, an account is created for each party on the quote (that does not have an account) when the quote is converted into an order.

25.2 Creating a Customer

You can create customers in the Forms UI by selecting **Enter Customer** from the Actions menu. This menu option calls up the Oracle Receivables form that you can use to create customers. Refer to the *Oracle Receivables User's Guide, Release 11i* for more information.

Note: The Oracle Receivables **Enter Customer** form always creates accounts for new customers. Thus, this form must be disabled if users should be able to create customers without creating financial accounts. See the *Oracle Quoting Implementation Guide* for more information.

To create a new customer in Oracle Quoting:

Prerequisites

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

Navigation

Quoting > Overview

Steps

1. Select **Actions** > **Enter Customer** > **OK**.

The Oracle Receivables customer form appears.

2. Fill in the form as described in the *Oracle Receivables Users Guide, Release 11i*.

Note: You can create prospect customers from Quoting - HTML, Oracle Telesales, or Oracle Field Sales.

Entering Address and Payment Information

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

- [Section 26.1, "Overview of Address and Payment Information"](#)
- [Section 26.2, "Defaulting of Addresses"](#)
- [Section 26.3, "Entering Billing Information"](#)
- [Section 26.4, "Entering Shipping Information"](#)
- [Section 26.5, "Entering Quote-to Address"](#)
- [Section 26.6, "Entering Line-level Billing"](#)
- [Section 26.7, "Entering Line-Level Shipping"](#)
- [Section 26.8, "Entering Line Level Shipping Details"](#)
- [Section 26.9, "Entering Header Shipping Details"](#)
- [Section 26.10, "Entering Header Payment Information"](#)

26.1 Overview of Address and Payment Information

You can designate a number of different addresses on a quote. Each address serves a different purpose, but they are not all mandatory.

- **Quote-To Address** — Physical address associated with the Quote-To customer or contact.

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

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

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

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

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

You can also designate billing and shipping addresses at the line level. Therefore, if you have an order where you need to invoice some of the items to one location and invoice part of the order to another location or organization, you can designate that information in the quote.

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

26.2 Defaulting of Addresses

Addresses are defaulted into the Addresses tab of the Quoting form, based on the following conditions, when creating quotes standalone, from opportunities, or from templates.

Quote-To Address

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

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

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

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

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

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

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

Bill-To Address

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

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

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

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

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

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

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

Ship-To Address

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

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

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

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

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

26.3 Entering Billing Information

To enter a bill-to customer and address for an order:

Note: If you wish to bill individual lines to different locations, refer to [Section 26.6, "Entering Line-level Billing"](#).

Prerequisites

- The customer must be displayed in the Quoting form.
- The individual to be billed and the billing address must already exist in the database.

Navigation

Quoting > Quote Header > Addresses

Field Behavior

- Copy From Quote To

Selecting Copy From Quote To copies address information from the quote-to address.

- **Bill To Customer & Bill To Account**

The maximum number of results in the LOVs for the Bill To customer and account at the header and line level is limited by the profile option *ASO: Max Number of Results*.

- **Contact**

The LOV displays only contacts (parties of type **Person**) that have a valid relationship with the bill-to party.

- **Bill To Address**

The bill-to address LOV displays all existing addresses for both the customer and the contact, if there is one. Therefore, if the bill-to contact changes and the bill-to address belonged to that contact, the address fields clear. If a new contact is selected, you are prompted to use the Address LOV to enter a new bill-to address for either the bill-to customer or contact.

If there is no bill-to contact, the LOV displays only addresses for the bill-to customer.

Note: If the selected Bill-To address is not of usage type *bill-to*, it will be created as a bill-to address when the quote is created/saved.

Steps

1. Select the customer name. The account (if any) is copied to the Bill To Account field.

Note: The Bill-To account is optional when creating/saving the quote, unless the bill-to customer has at least one active account.

If the Bill-To Customer is copied from the Quote-To Customer, the Quote-To account value is copied into the Bill-To Account field.

2. Select the bill-to address and save the quote.

26.4 Entering Shipping Information

Note: If you wish to ship individual lines to different locations, refer to [Section 26.7, "Entering Line-Level Shipping"](#).

To enter a ship-to customer and address for an order:

Prerequisites

- The customer must be displayed in the Quoting form.
- The individual to ship to and the shipping address must already exist in the database.

Navigation

Quoting > Quote Header tab > Addresses

Field Behavior

Copy From Quote To

Selecting Copy From Quote To copies address information from the quote-to address.

- Ship To Customer & Ship To Account

The maximum number of results in the LOVs for the Ship To customer and account at the header and line level is limited by the profile option *ASO: Max Number of Results*.

- Contact

The LOV displays only contacts (parties of type **Person**) that have a valid relationship with the ship-to party

- Ship To Address

The ship-to address LOV displays all addresses for both the customer and the contact (if there is one). Therefore, if the ship-to contact changes and the ship-to address belonged to that contact, the address fields clear. If a new contact is selected, you are prompted to use the Address LOV to enter a new ship-to address for either the ship-to customer or ship-to contact.

Steps

1. Select the customer name. The account (if any) is copied into the Ship To Account field.

Note: The Ship-To account is optional when creating/saving the quote, unless the ship-to customer has at least one active account.

If the Ship-To Customer is copied from the Quote-To Customer, the Quote-To account value is copied into the Ship-To Account field.

2. Select the ship-to address and save the quote.

Note: If the selected Ship-To address is not of usage type "Ship-to," it will be created as a Ship-to address when the quote is created/saved.

26.5 Entering Quote-to Address

To designate a quote-to address:

Navigation

Quoting > Quote Header > Addresses

Field Behavior

- Phone

A value is defaulted into this field, based on the following conditions:

- * If the quote-to customer is an organization and a quote-to contact is specified, this field is populated with the contact's primary phone number.
- * If the quote-to customer is an organization without and no contact is specified, no defaulting occurs.
- * If the quote-to customer is a person, this field is populated with the primary phone number for the quote-to customer.

Steps

1. In the Quote Header tab, select Addresses.

2. Select the Address. The LOV displays all addresses for the customer and quote-to contact.

The corresponding address fields are automatically populated.

Note: If the selected Quote-To address is not of usage type "sold-to," it will be created as a sold-to address when the quote is created.

26.6 Entering Line-level Billing

To designate line level billing information:

Prerequisites

- The item for which you want to designate a different billing address, must be displayed in the Quote Lines tab.
- The payment type on the quote must be either **Cash** or blank and there must not be a Purchase Order number specified.
- *ASO: Enable Line Level Billing* must be set to *Yes* at the appropriate level.
- The highest version of the quote must be used.
- The line must not be a component of a configured product.

Navigation

Quoting > Lines > Bill-To

Field Behavior

- Account

An account number is defaulted into the Account field based on the customer selected. If the customer is not specified, you can directly select an account. The customer for the account will be copied to the account field.

Steps

1. Select the Customer.

The behavior of this field depends on the setting of profile option *ASO: Enforce Account Relationships*. See [Section 25.1.2, "Creation of Accounts"](#).

2. Use the Address LOV to select a line bill to address and save the quote.

26.7 Entering Line-Level Shipping

To designate line level shipping information:

Prerequisites

- The item you want to designate a different shipping address for, must be displayed in the Quote Lines tab.
- The line must not be a component of a configured product.
- The highest version of the quote must be used.
- The quote is not in a read-only status.

Navigation

Quoting > Quote Lines tab > Ship-To

Field Behavior

- Account

An account number is defaulted into the Account field, if one exists. If the customer is not specified, you can directly select an account. The customer for the account will be copied to the account field.

Steps

1. Select the customer.

The behavior of this field depends on the setting of profile option *ASO: Enforce Account Relationships*. See [Section 25.1.2, "Creation of Accounts"](#).

2. Select the address and **save** the quote.

26.8 Entering Line Level Shipping Details

To enter line level shipping information:

Prerequisites

- The line must not be a component of a configured product.

Note: You can specify the Warehouse and Requested Date for a component.

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

Navigation

Quoting > Quote Lines > Shipping

Field Behavior

- Requested Date

The requested date can either be the shipped date of the received date.

- Warehouse

This field is disabled if *ASO: Enable Manual Warehouse Selection* is set to *No*.

- Shipping Method

If a warehouse is not specified, shipping method is validated against the carrier-ship method relationships for the inventory organization for the product on the quote line.

If a warehouse is specified, shipping method is validated against the carrier-ship method relationships for the warehouse specified on the quote line.

If you change the line level warehouse, and the new warehouse/shipping method is not valid, this field will be cleared.

- Shipment Priority

This LOV lists the values in the OM lookup SHIPMENT_PRIORITY

- FOB

Indicates the point of location where the ownership title of goods is transferred from seller to buyer. This LOV lists values from the AR lookup FOB.

- Freight Terms

Indicate who pays for freight and when it must be paid. Freight terms do not affect accounting freight charges.

This LOV lists all freight terms available in the OM lookup FREIGHT_TERMS.

Steps

1. Select the line for which you want to designate line level shipping.
2. Select an address and save the quote.

26.9 Entering Header Shipping Details

To enter shipping details:

Navigation

Quoting > Quote Header > Payment, Shipping

Field Behavior

- Shipping Method

The LOV shows all valid and active shipping methods for the product validation organization for the operating unit associated with the quote.

- Freight Terms

Indicates who pays for freight and when it must be paid. Freight terms do not affect accounting freight charges.

- This LOV lists all freight terms available in the OM lookup FREIGHT_TERMS.FOB

The point or location from where ownership title of goods is transferred from seller to buyer. This LOV lists values from the AR lookup FOB.

26.10 Entering Header Payment Information

Note: Oracle Quoting supports the use of Payment Terms Substitution. Please see [Section 24.1.8, "Terms Substitution"](#) for more information.

To enter payment information for your customer:

Prerequisites

The Quote Header tab displays the customer.

Navigation

Quoting > Quote Header > Payment, Shipping

Field Behavior

Payment Terms

Payment Terms are defaulted at the time of quote creation, based on the following conditions:

- Header-level Agreement

Payment term defaulting can also occur when the Header-level Agreement is assigned or changed.

Steps

1. Select the payment terms.
2. Select the payment type.

Available payment types: Cash, Check, Credit Card, or blank.

- If you selected **Check** as the payment type, then enter the check number in the Check Number field.
 - If you selected **Credit Card** as the payment type, then:
 - a. Select the credit card type and enter the card holder's name, credit card number, and expiration date.
3. Select **Save**.

Note: If Oracle *iPayment* is also installed, the application performs a credit card check once the quote is submitted as an order. For more information, consult the *Oracle iPayment Concepts and Procedures*.

Modifying Quotes

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

- Section 27.1, "Modifying a Customer Quote"
- Section 27.2, "Adding Products to the Quote"
- Section 27.3, "Adding a Service to the Quote"
- Section 27.4, "Entering Installation Details"
- Section 27.5, "Duplicating a Line"
- Section 27.6, "Configuring a Product"
- Section 27.7, "Adding a Related Product"
- Section 27.8, "Checking Product Availability"
- Section 27.9, "Adding Trade-In Products to Quotes"
- Section 27.10, "Splitting Lines"
- Section 27.11, "Entering Tax Details"
- Section 27.12, "Viewing Quote Tax Details"
- Section 27.13, "Viewing the Quote Versions"
- Section 27.14, "Viewing Customer Quotes"
- Section 27.15, "Viewing the Order History for a Customer"
- Section 27.16, "Applying an Agreement to the Quote"
- Section 27.17, "Entering Sales Supplement Information"
- Section 27.18, "Using Descriptive Flexfields"

- [Section 27.19, "Changing the Order Type for a Quote"](#)

27.1 Modifying a Customer Quote

To find and modify a customer quote:

Prerequisites

If finding and modifying quotes using the Customer History form, the customer must be displayed in the Oracle Quoting form.

Whether you can modify a quote depends on its status. Not all quote statuses allow you to make modifications. For more information on the quote statuses permitting updates, see [Section 20.1.2, "Quote Status"](#) or the *Oracle Quoting Implementation Guide*.

Steps

1. Locate the quote to modify using one of the following methods:
 - a. The Quote search procedure outlined in [Section 22.2, "Searching for Quotes"](#).OR
 - a. The procedure outlined in [Chapter 22.1, "Searching Using the Query Method"](#).OR
 - a. From the Reports menu, select **Customer History**. The Customer History window appears.
 - b. Select your quote in the Quotes tab, and click **View Quote**. The quote displays in the Oracle Quoting form. Only the latest version of a quote can be modified.
2. Modify the quote by:
 - Altering customer information
 - Changing product quantities
 - [Adding Products to the Quote](#)
 - [Entering Header Payment Information](#)
 - [Entering Billing Information](#)

- [Entering Shipping Information](#)
 - [Creating an Attachment](#)
 - [Viewing and Adding Notes to a Quote](#)
3. Select **Save**.

Depending on the status of the quote, the changes you make are saved either in the version of the quote you are editing or in a new version. See [Section 20.1.2, "Quote Status"](#) for more information.

27.2 Adding Products to the Quote

To add products to the quote:

Prerequisites

Your customer is displayed in the Header tab of the Oracle Quoting form.

Navigation

Quoting > Quote Lines

Notes

You can delete products by highlighting the product line and selecting **Edit > Delete**. The line is removed from the quote and the remaining lines are renumbered.

Steps

1. Use the Product LOV to select the product, or enter the product description or part number. The behavior of this field depends on whether interMedia Search is enabled. See [Section 22.4, "Using interMedia Search"](#) for more information.

Or use the product search, by selecting **Actions > Product Search**, to copy and paste the part number from the search results to the Product field.
2. Select the **Product Details** button to view the product details.

This Product Details form indicates the user item type and whether the product is returnable, serviceable, shippable, or is a support service.
3. Enter the quantity in the Qty field.

The quantity defaults from the profile option *ASO: Default Ordered Qty in OC UI*. See the *Oracle Quoting Implementation Guide* for more information.

4. Use the Price List LOV to select a price list for the line. You can only select a price list if *ASO: Price List Override* is set to *Yes*.
5. If the Item Type is **Model**, then the product is configurable. The product displayed is the base model. You can configure this product to add more components. See [Section 27.6, "Configuring a Product"](#) for more information.

For all other products the product pricing appears. The Unit Price shows the list price on the price list shown in the Price List field.

6. Save the quote.

27.2.1 Line Numbers

Line numbering in the Quoting UI is based on product type. Line numbers are formatted as follows: A.B.C

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

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

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

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

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

Table 27–1 Line Numbers and Product Types

Line Number	Product Type
1.0	Standard Product
2.0	Top level model product
2.0.1	Service for model in line 2.0
2.0.2	Service for model in line 2.0
2.1	Component #1 (option class)
2.1.1	Service for component in line 2.1
2.2	Component #2 (Child of option class)
3.0	Service for serviceable product in the Installed Base or Pending Order
4.0	Serviceable product
4.0.1	Service for serviceable product in line 4.0
4.0.2	Service for serviceable product in line 4.0

You can insert or delete lines between existing lines and the line numbers will be adjusted accordingly. Line numbers displayed on the quote print out match the line numbers in the Quote Lines tab. Quote line numbers are not passed to Oracle Order Management when a quote is converted into an order.

27.3 Adding a Service to the Quote

Services are available in Oracle Quoting for serviceable products on the current quote, serviceable products that have been ordered but have not yet shipped, and serviceable products that were shipped and received.

Note: Services apply to Serviceable products and cannot be sold without referencing a serviceable product on a current quote, order, or customer installed base.

There are two types of services:

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

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

- **Extended Warranties** — Services that may be purchased in addition to a serviceable product. Extended warranties are designated in Oracle Inventory as follows:
 - Service is checked
 - Warranty is unchecked.

Validation of the relationship between a serviceable product and a service is performed in Oracle Service Contracts. Oracle Service Contracts determines which services are available for a serviceable product. For each service, customers and serviceable products can be excluded.

When a service is purchased, the following conditions must be present:

- The service must reference a serviceable product that is:
 - On the current quote
 - Purchased but has not yet shipped
 - Purchased and recorded in the customer install base
- There should be a valid relationship between the service and serviceable products:
 - **No relationship** — There are no exclusions set up in Oracle Service Contracts, and therefore every service can be purchased for a serviceable product.
 - **Oracle Service Contracts** — Serviceable product and customer do not appear on the list of exclusions for the selected service.
- The serviceable product used as a service reference cannot be a trade-in.
- The period and duration must meet the minimum period and duration set in Oracle Service Contracts.

27.3.1 Adding a Service to a Serviceable Product on the Quote

To enter a service for a serviceable product on the current quote:

Prerequisites

- The quote line must be saved.
- The product on the quote must be a serviceable product.
- The product must not be a trade-in product.

Navigation

Quoting > Quote Lines > Actions > Service Items

Notes

The Service Items form displays included services, services already included with the serviceable product, and available extended services.

Steps

1. Highlight the extended service(s) to apply to the serviceable product in the Other Available Services table and select **Add to Quote**.

You can multi-select services using one of the following methods:

- Shift+mouse click
- Shift+down arrow key
- Ctrl+mouse click

If the service is not on the current price list, you will get a Pricing error when you try to create a line.

2. Choose a price list and select **OK**.

The service product displays in the Quote Lines tab as a subset of the serviceable product. The duration, period, and start date default into the line.

Note: If the item requires line level mandatory flexfields and/or pricing attributes, then the user should not add multiple services at the same time.

27.3.2 Adding a Service to the Quote

To add a service to a quote that does not contain serviceable products:

Navigation

Quoting > Quote Lines > Service

Notes

- The actual start date of a service is different from the date you enter in the Start Date field when adding a service to a quote.

If the serviceable product for the service is already in Oracle Install Base, then the start date is the day the product is ordered.

If the service is for a serviceable product that you are ordering, the start date is the actual shipping date of the product plus the value in the Service Starting Delay field (defined for the product in Oracle Inventory).

- If searching for a serviceable product in the customer's Installed Base or on a Pending Order, you can use one or more of the available criteria.
- Once you add a service, it is displayed in the Quoting form as a separate quote line. The service information is displayed in the Service section of the Quote Lines tab.

Field Behavior

The Product Category LOV will show all categories that belong to the category set. Additionally, the product catalog will only show categories (for the category set) that contain at least one product.

Steps

1. Either enter the service part number into the field or use the LOV to select the service.
The duration, period, and start date default into the appropriate fields.
2. In the Details section, select **Reference**.
3. Select the appropriate category from the Service For list:
 - **Current Quote:** If the service is for a product in the current quote
 - **Pending Orders:** If the service is for a product in an order
 - **Installed Base:** If the service is for a product already installed at a customer site.
4. Search for and select the product to associate the service with. Click **Apply**.

27.4 Entering Installation Details

The Transaction Details form is owned by Oracle Installed Base.

This menu option is available only if the Network Logistics Trackable flag is enabled for the product. This flag is set in the Item master definition in Oracle Inventory.

To enter installation details for a product that is Network Logistics trackable:

Prerequisites

- The product must be saved and selected in the Quote Lines tab.
- The product is not a trade in.
- The user must have **Update** access to the quote.
- The highest version of the quote must be used.
- The quote must not be in a read-only status.
- The **Network Logistics Trackable** flag must be set to **Yes** for the product.
- The quote must not be submitted for batch pricing.

Navigation

Quoting > Actions > Installation Details

Field Behavior

The Product Category LOV will show all categories that belong to the category set. Additionally, the product catalog will only show categories (for the category set) that contain at least one product.

Steps

1. Fill out the form as described in the "*Using the Transaction Details Window*" section of the *Oracle Install Base Concepts and Procedures*.
2. Save your changes.

The installation details are passed to the order when the quote is submitted to Oracle Order Management.

27.5 Duplicating a Line

When you duplicate a line, line level attributes, including price list, line level billing, line level flexfields, and line level attachments are copied to the new line. If a service is associated with the line, the service is copied as well.

To duplicate a line:

Prerequisites

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

Navigation

Quoting > Quote Lines

Steps

1. Select the quote line to copy and select **Actions > Duplicate Line > Go**.
The duplicated line is added as the last line of the quote.

27.6 Configuring a Product

To configure a model product:

Prerequisites

- Verify that the product is a model product by selecting the oval button to the right of the Description field or by exposing the Configurable field in the Pricing region of the Quote Lines tab. This button accesses the Product Details form.
- The quote must be saved.
- The user must have **Update** access to the quote

- The highest version of the quote must be used
- The quote must not be in a read-only status
- The quote must not be submitted for batch pricing.
- You can only change the quantity of model products if *ASO: Allow Quantity Updates for Top Level Model Item* is set to *Yes*.
- You can only change the quantity for components if *ASO: Allow Quantity Updates for Component Item* is set to *Yes*.

Navigation

Quoting > Quote Lines > Configure

Notes

- The model product appears in its own line on the quote. The Model Status field indicates if the model is incomplete. If the field is blank, the model is complete. If there is an asterisk in the field, the model is incomplete. You cannot place an order if the model is incomplete.
- You can change the quantity of the top level model or one of its components by overwriting the value in the Quantity field and saving the quote. If changing the quantity of the top level model product, the quantity of all the components will be updated to match the model product's quantity. If changing the quantity of a component, the top level model product and all other components will be updated to match the quantity.

Steps

1. Configure the product as necessary. See the latest Oracle Configurator documentation for more information.

Note: Additionally, ensure that there are no red asterisks in the category folder icons in the Oracle Configurator form. A red asterisk next to a category can indicate that the category is incomplete.

2. Select **Done**. The products you selected are added to the quote as separate lines.

Note: To ensure that the product has been properly configured, verify that there is no asterisk in the Model Status field.

27.6.1 Deleting a Component

You can delete components of model products without invoking Configurator. Configurator rules are invoked after each deletion and the incomplete indicator appears if the deletion results in an incomplete configuration. If the deletion results in an invalid configuration, you cannot save the configuration. The configurations for the model products and components revert back to the previously saved configurations.

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

Prerequisites

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

Navigation

Quoting > Quote Lines

Steps

1. Select the component and select **Delete** from the Edit menu.
2. You are asked to confirm the deletion. Select **Ok**.

The component is removed from the configuration and the remaining lines are renumbered accordingly.

27.6.2 Duplicating an Existing Configuration in a Quote

You can copy a top level model product to a new model product within a quote. When copied, the top level model product and its components are an exact copy of

the original configuration. If the original configuration has services associated with it, they are copied into the new configuration. Line level attributes, including price list, line level billing, line level flexfields, and line level attachments are copied as well.

Prerequisites

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

Navigation

Quoting > Quote Lines

Steps

1. Select the configuration and select **Actions > Duplicate Line > OK**.

The duplicated configuration is added after the last line in the quote.

27.6.3 Splitting a Configured Line

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

To split a configured line:

Prerequisites

- The quantity of the line you want to split must be greater than 1.
- The user must have update access to the quote.
- The quote must not be in a read-only status.

- The highest version of the quote must be used.
- The quote line must not be a model component.
- The quote line must not be a service.
- The quote line must not be a trade-in from the Installed Base.
- The quote must not be submitted for batch processing.

Steps

1. Select the configured line to split.
2. Select **Actions > Split Line > OK**.
3. In the Split field, enter the quantity you want to split into another line and select **Apply**. The Lines page displays the split quantities as separate lines.

27.7 Adding a Related Product

To sell a related product to your customer:

Prerequisites

- Related products must be set up for this product.
- The user must have Update access to the quote.
- The highest version of the quote must be used.
- The quote must not be in a read-only status.
- The product must not be a trade-in product.
- The quote must not be submitted for batch pricing.

Navigation

Quoting > Quote Lines

Notes

When you select a related product, a window displays the available price lists for the currency. If only one price list exists, Oracle Quoting automatically chooses that price list and prices the product accordingly.

Steps

1. Select the line to which you want to add related products and select **Actions > Add Related Products > OK**.

2. Select the Related Product and save the quote.

The product you selected in the Related Products window is inserted after the related product and the line numbers are recalculated accordingly.

3. Save the quote.

After saving the quote, the related product is assigned a line number.

Guidelines

Choosing a related product changes the quote as follows:

- Adding an up-sell product replaces the product in the quote.
- Adding a cross-sell product adds the product to the quote. You can add multiple cross-sell products to the quote.
- Adding a substitute product replaces the product in the quote.
- Adding any other relationship type adds the product to the quote.

27.8 Checking Product Availability

Quoting will automatically assign a warehouse based on Inventory sourcing rules or the value in profile option *ASO: Default Ship From Org*. This inventory warehouse is used for ATP checks and scheduling once the order is booked in Order Management.

You may override this warehouse if the profile option *ASO: Enable Manual Warehouse* is enabled, by changing the value in the Warehouse field of the ATP form. The warehouse you select is saved with the quote line and all subsequent ATP checks are performed against the designated warehouse.

The point at which inventory products are reserved depends on the setting of the system profile option *ASO: Reservation Level*. Contact the application administrator for details. Products are not reserved for your customer before you successfully place the order.

If you want to check the availability for the order as a whole, the cursor must be in the header section of the Oracle Quoting form. If you want to check the availability of a specific product, the product must be displayed in the Oracle Quoting form and the cursor must be in a Quote Lines tab field.

To find out when the desired quantity of an product will become available:

Prerequisites

The selected line must not be for a trade-in.

Navigation

Quoting > Quote Lines

Notes

The Available Date field displays the date when all of the requested quantity will be available for shipping.

If you place the order, the customer receives all of the currently available quantity. The balance is placed on back order and shipped on the available date.

Steps

1. Select **Actions > Check Availability > OK**. The Available To Promise form opens, displaying either the single selected product or a list of the products in the quote.

27.8.1 Manually Selecting a Warehouse

To manually select the warehouse from where the current product will ship:

Prerequisites

- The profile option *ASO: Enable Manual Warehouse* must be set to *Yes*.
- The quote must be saved.
- The line for which you want to select a warehouse must be selected.

Navigation

Quoting > Quote Lines > Shipping

Steps

1. Using the LOVs, select a Requested Date and Warehouse against which the ATP check is performed.
2. To save the warehouse designation for future ATP checks, ensure that the Save Warehouse flag is selected.

3. Save the quote.

Future ATP checks for the line are performed against the selected warehouse.

27.9 Adding Trade-In Products to Quotes

This procedure allows you to provide credit to customers for returning existing products when purchasing new products.

Note: If customers have trade-in products, they must also purchase products in the same quote. The order total cannot be negative. The Total Price and Line Total is displayed as a negative value for the trade-in product.

Pricing, taxes, and charges for trade-ins are calculated exactly as they are for regular products. When calculating the total price for the order, the returned product is treated as a credit and subtracted from the total.

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

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

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

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

Whether or not you can trade-ins depends on the setting of the profile option *ASO: Enable Line Type*. If this profile is set to *No*, the Line Category and Line Type fields will be disabled. The Line Category field will be a read-only field with the value *Order*. See *Oracle Quoting Implementation Guide* for more information.

The Line Category field is governed by the Order Type field in the Summary section. Oracle Quoting supports two Order category types:

- **Order** — Quotes can contain only orderable products.
- **Mixed** — Quotes can contain other line types in addition to **orderable**.

The Order Category Type must be set to **Mixed** before you can use trade-in products. Order Types are set up in Order Management. See the *Oracle Order Management User's Guide, Release 11i* for more information.

27.9.1 Adding a Trade-in to the Current Quote

To enter a product as a trade-in:

Prerequisites

- The product that the customer wants to trade in must be set up with the line type **Return**.
- The product must be **returnable**. To verify that it is returnable, select the oval button located next to the Description field in the Pricing Details section of the Quote Lines tab.
- The profile option *ASO: Enable Line Type* must be set to *Yes*.

Navigation

Quoting > Quote Lines

Steps

1. In the Details section, select **Return** in the Line Category field.

2. Use the Product LOV to select a trade-in product and save the quote.

Oracle Quoting calculates the total price based on the current purchase and the trade-in, and displays it in the Total Price field on the Oracle Quoting form.

OR

1. If a product has been added with an Order line type, check if it is Returnable by selecting the oval button to the right of the Description field or expose the Returnable field in the Pricing region of the Quote Lines tab.

2. Save the quote.

Oracle Quoting calculates the total price based on the current purchase and the trade-in, and displays it in the Total Price field on the Oracle Quoting form.

27.9.2 Adding a Trade-in From the Customer Install Base

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

Prerequisites

The order type must be **Mixed**.

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

Navigation

Quoting > Trade In Product

Notes

- You can disable the display of attributes using the profile option *ASO: Display Installed Base Attributes*. To disable display, set this profile option to No at the Site level.

Field Behavior

- The Product Category LOV will show all categories that belong to the category set. Additionally, the product catalog will only show categories (for the category set) that contain at least one product.
- Attributes Name

If multiple trade-ins are selected in the search results, the attributes are displayed for the current selection. The current selection indicator is located in the first column of the Results table.

- **Components**

If the current trade-in selection is a model or component, the Configurator tree is displayed.

Clicking Details displays the component details and the attribute details if *ASO: Display Installed Base Attributes* is set to *Yes*.

Steps

1. Search for and select a product to trade in. Highlight the product and select **Add to Quote**.

The selected trade-in(s) is added to the quote and the selling price of the trade-in is subtracted from the total.

27.10 Splitting Lines

In Oracle Quoting, you can split a line if the quantity is greater than 1. This is useful if you want to order a large quantity of one product with various ship-to and bill-to addresses. For example, if want to order 5 laptops, and ship 3 of them to one location and 2 to another.

To split a line:

Prerequisites

- The quote line must be saved and selected in the Quote Lines tab.
- The user must have Update access to the quote
- The highest version of the quote must be used
- The quote must not be in a read-only status
- The product must not be a service
- The product must not be a trade-in product
- The product must not be a model component
- The quote must not be submitted for batch pricing.

Navigation

Quoting > Quote Lines

Steps

1. Select **Actions > Split Line > OK**.
2. Enter the quantity you want to split to another line in the Split Quantity field and select **Apply**.

The Total field displays the summation of the Split Quantity values. In the Quote Lines tab the quantity you split is a separate line.

27.11 Entering Tax Details

There are three tax options:

- **Exempt** — The current quote is exempt for a normally taxable customer site.
- **Require** — The current quote is taxable for a normally non-taxable ship-to customer (at the quote level only).
- **Standard** — Taxation for the current quote should be based on existing exemption rules.
- **Override Exemptions** — This value is only valid if you are using a non-Oracle tax engine, and is ignored by the Oracle Tax Engine. If selected, the same behavior outlined in the *Require* tax option applies.

The following tax details are displayed for each distinct tax code on the quote:

- Tax code
- Total tax amount for the tax code
- Tax exempt reason and number, if quote is tax exempt

To enter tax exemption information for a quote:

Note: If tax setup is based on Latin tax, the Tax Handling, Exempt Reason, and Exempt Number fields will be cleared and disabled.

Navigation

Quoting > Quote Header tab > Tax

Steps

1. Use the Tax Handling LOV to select the tax method.
 - a. If you select Exempt, then:
 - * Enter the exempt number in the Exempt Number field. You can select a pre-defined tax exemption certificate from the LOV or enter a new, unapproved exemption number certificate.
 - * Enter an exempt reason in the Exempt Reason field.

If you choose an exempt number from the LOV, the exempt reason automatically displays in this field. If no reason is defined or you enter an unapproved exempt number, you will be able to select a tax exemption reason from those defined in the Receivables QuickCodes window.
 - b. If you select Require, save the quote.
 - c. If you select Standard, save the quote.

Note: The Exempt Number and Exempt Reason fields are disabled unless you select Exempt as the tax handling method.

* **Save** the quote.

27.12 Viewing Quote Tax Details

You can view tax details for each quote line.

To view tax details:

Prerequisites

The line for which you want to view tax details must be selected in the Quote Lines tab.

Navigation

Quoting > Quote Lines

Steps

1. Select **Actions > Tax Details > OK**.

The following tax details are displayed:

- * Tax code
 - * Tax rate
 - * Tax amount
2. Select **OK** to return to the Quote Lines tab.

27.13 Viewing the Quote Versions

Use this procedure to view the versions of the current quote. Details include:

- Version Number
- Status
- Amount
- Currency
- Created By
- Creation Date
- Updated By
- Update Date

Prerequisites

The quote must be displayed in the Oracle Quoting form.

Navigation

Quoting > Quote Versions

Notes

You can view old versions of a quote by selecting **View**. Previous versions are displayed in read-only form in the Quoting UI.

27.14 Viewing Customer Quotes

There are two methods a user can use to find and view quotes:

- Quote Search
- Customer History form

For information on Quote Search, see [Section 22.2, "Searching for Quotes"](#).

27.14.1 Using the Customer History Form to View Customers Quotes

Use this procedure to view a list of the quotes prepared for the current customer. In this window you can identify which quotes were created from opportunities as well as those quotes converted to orders or leading to contracts.

Since previous versions of Oracle Quoting do not require account numbers to create a quote, users can view quotes without designating an account number. An account number is required if you want to update or place an order from the quote.

Prerequisites

The customer must be displayed in the Oracle Quoting form.

Navigation

Quoting > Reports > Customer History > Quote tab

Notes

Quotes tab

The tab lists all quotes for this customer. Each line lists quote name, quote number, account number, quote status, quote total, currency, quote expiration, contact name, and salesperson name. You can also view information on the opportunity related to the quote or the number of the order placed from the quote.

Steps

1. Select **View Quote** to view a selected quote.

If the customer has more than one account, the Account field in the header of the Customer History window displays an LOV of accounts when you click in the field. Change the account to view the quotes for that account.

27.15 Viewing the Order History for a Customer

Use this procedure to view the order history for the customer currently displayed in the Oracle Quoting form. For a given order, the Order History displays information regarding the quote related to the order and the order itself. If an account is selected for the quote-to customer, the Order History displays a list of orders related to the quote-to customer and designated account. You can select a different quote-to customer account using an LOV.

Prerequisites

The quote-to customer must be displayed in the header of the Oracle Quoting form.

Navigation

Quoting > Reports > Customer History > Orders tab

Steps

1. Highlight an order to view the order details and select **View Quote** to view the quote that preceded the order. Select **View Order** to view the Order.

The Oracle Order Management Sales Order form opens. Close this window to return to the Customer History form.

27.16 Applying an Agreement to the Quote

Agreement terms with a customer are set up by your company in Oracle Order Management or Oracle Pricing. Agreements can include price lists, discounts, payment terms, and shipping address.

You can select an applicable header-level pricing agreement in the main Quoting form. You can also select agreements at the line level. If a line level agreement is selected, the line price list defaults from the selected agreement.

The Agreement LOVs display all agreements in all currencies set up for the selected sold-to customer and customers related to the sold-to customer, and all agreements in all currencies with no customer specified. Only agreements that are valid as of the pricing effective date are displayed. If there is no pricing effective date, only agreements valid for the current date are available.

Agreements and Currency

If the price list associated with the header level agreement has a different currency than what is currently selected on the quote or there is no conversion to the currency on the quote, the agreement price list will be defaulted and the currency will be changed to the base currency for the price list.

If the price list associated with the line level agreement is of a different currency than what is currently selected on the quote or there is no conversion to the currency on the quote, the price list will not be defaulted. The price list will default to null.

The price list for both header and line level will be defaulted if the quote currency is the same as the price list currency or there exists a conversion to that currency.

Prerequisites

An agreement with the current customer or a customer related to the Quote To customer or a universal agreement must exist.

To apply an agreement to a quote:

Navigation

Quoting > Quote Header tab > Summary (header level)

Quoting > Quote Lines tab (line level)

Notes

The price list and payment terms are defaulted based on the selected agreement.

Steps

1. Use the Agreement LOV to enter an agreement, if one exists.
2. Save the quote.

The agreement terms are applied to the quote.

27.17 Entering Sales Supplement Information

Sales Supplement allows the capture of additional quote-specific information that is not passed into Oracle Order Management. You can enter sales supplement at line level or at header level.

To enter Sales Supplement information:

Quoting > Quote Lines > Actions > Enter Sales Supplement (Line)

Prerequisites

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

Navigation

Quoting > Actions > Sales Supplements (Header)

Field Behavior

- Template

A value is defaulted into this field based on the setting of either the profile option *ASO: Default Header Level Sales Supplement Template* or the profile option *ASO: Default Line Level Sales Supplement Template*.

Steps

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

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

27.18 Using Descriptive Flexfields

To enter information into flexfields:

See the *Oracle Quoting Implementation Guide* and the *Oracle Applications Flexfields Guide* for more information on setting up flexfields.

Prerequisites

Flexfields must be set up and customized identically in Oracle Quoting and Order Management.

Notes

- Header level flexfields are located in the header region of the main Quoting form.
- Line level flexfields are located in the Quote Lines tab.

Steps

1. Click in the descriptive flexfield to display the flexfield form.
2. Enter a value into each segment, either by typing it in or by choosing from the LOV.
3. Select **OK** to close the flexfield form.

27.19 Changing the Order Type for a Quote

Order types, which classify orders and returns, are set up in Oracle Order Management (OM). The order type for a quote determines how that order will be processed in OM.

Note: The order category for each order type must be *Order* or *Mixed*.

You can change the order type for a quote at any time during the Quoting process. When changed, the order type is validated against the line category code for each of the quote lines. If there are lines with an invalid order type/line category code combination, the change to these lines will not be allowed.

Note: If the order type is changed, the defaulting logic for the price list is reapplied.

The defaulting behavior for Order Type is displayed on the Create Quote from Opportunity form and the Summary region of the Quote Header tab.

Prerequisites

- You must have Update access to the quote
- You must use the highest version of the quote
- The quote must not be in a read-only status
- The quote must not be submitted for batch processing

Navigation

Quoting > Quote Header > Summary

Field Behavior

- Order Type

The value defaulted into this field is from the profile option *ASO: Default Order Type*. The LOV lists all order types that have workflow assigned to them. It is not filtered based on line category code in the quote lines.

Copying Quotes

This section contains information on copying quotes.

- [Section 28.1, "Overview of Copying a Quote"](#)
- [Section 28.2, "Copying a Quote"](#)

28.1 Overview of Copying a Quote

In Oracle Quoting you can copy existing quotes to create new quotes or copy a quote to a new version.

The table below lists the information copied to a new quote and to a new version.

Table 28–1 Copy Quote Behavior

	Copy to New Quote	Copy to New Version (Forms only)
Quote Name	Yes	Yes
Quote Number	No	Yes
Version Number	No	No
Opportunity	No	Yes
Contract Template	Yes	Yes
Contract Clauses and User Variables	No	Yes
Contract Acceptance Details	No	No
Contract Attachments	No	No
Expiration Date	No	Yes

Table 28–1 Copy Quote Behavior

	Copy to New Quote	Copy to New Version (Forms only)
Status	No	No
Published Flag	No	No
Sales Channel	Yes	Yes
Campaign	Yes	Yes
Primary Salesperson	No (if <i>ASO: Automatic Sales Team</i> is set to <i>None</i>) Yes (if <i>ASO: Automatic Sales Team</i> is set to <i>Full</i> or <i>Partial</i>)	Yes
Primary Sales Group	No (if <i>ASO: Automatic Sales Team</i> is set to <i>None</i>) Yes (if <i>ASO: Automatic Sales Team</i> is set to <i>Full</i> or <i>Partial</i>)	Yes
Order Number	No	N/A
Quote-to Customer (party and account)	Yes	Yes
Quote-To Contact	Yes	Yes
Quote-To Address	Yes	Yes
Ship-To Customer (Party and Account)/Contact/Address at Header Level and Line Level	Yes	Yes
Shipping Method, Shipping Instructions, Packing Instructions, Requested Delivery Date at Header and Line Level	Yes	Yes
Bill-To Customer (Party and Account)/Contact/Address at Header Level and Line Level	Yes	Yes
Payment Terms at Header Level	Yes	Yes

Table 28–1 Copy Quote Behavior

	Copy to New Quote	Copy to New Version (Forms only)
Payment and Tax Information at Header and Line Level	Yes	Yes
Regular Items, Configured Items, Service Items and their reference source, Quantity, and UOM	Yes	Yes
Manual Price Adjustments	Yes	Yes
Automatic Price Adjustments	Yes	Yes
Currency at Header Level	Yes	Yes
Price List at Header Level and Line Level	Yes	Yes
Pricing Agreement at Header Level	Yes	Yes
Promotion Codes at Header and line Level	Yes	Yes
Line Types	Yes	Yes
Line Category Code	Yes	Yes
Order Type	Yes	Yes
Sales Credits at Header and Line Levels	Yes	Yes
Attachments	User Choice	Yes
Notes	User Choice	User Choice
Descriptive Flexfields at the Header and Line Level	Yes	Yes
Sales Team	No (if <i>ASO: Automatic Sales Team</i> is set to <i>None</i>) Yes (if <i>ASO: Automatic Sales Team</i> is set to <i>Full</i> or <i>Partial</i>)	Yes
Approval History	No	No
Sales Supplement	No	No

Table 28–1 Copy Quote Behavior

	Copy to New Quote	Copy to New Version (Forms only)
Pricing Updated On	No	No
Pricing Status	No	No
Tax Updated On	No	No
Tax Status	No	No

28.2 Copying a Quote

You can copy the following quote information:

- Quote Header — Header information only
 - Lines — Header information as well as line item, billing and shipping addresses, and payment information
 - Notes — Header information and all notes associated with a quote
 - Attachments — Header information and all attachments associated with a quote
- All Quote Info — Includes header information, line information, notes and attachments

For example, you can use **Copy From: Quote Header** if you need to create another quote for the customer whose quote is currently displayed in the Oracle Quoting form. **Copy From: All Quote Info** could be useful if you want to create two copies of the same quote with an item difference.

To copy a quote:

Prerequisites

The original quote must be displayed in the Oracle Quoting form.

Navigation

Quoting > Quote Header > Actions > Copy Quote

Notes

- **New quote:** This option copies the quote information you selected above into a new quote. If the profile option *ASO: Automatic Numbering* is set to *No*, you

must enter a quote number in the New Quote Number field. This field is disabled if *ASO: Automatic Numbering* is set to *Yes*.

- **Version:** This option copies the quote information you selected above into a new version of the existing quote. You cannot create a new version of a quote in *Approval Pending* or *Order Submitted* status.

Steps

1. Choose to copy either the Quote Header or All Quote Information.
2. Choose to copy to either a new quote or a revision and select OK.

A new or revised quote is created and displays in the Oracle Quoting form.

Initiating Approvals

This chapter discusses the approval process in Oracle Quoting.

- [Section 29.1, "Overview of Approvals"](#)
- [Section 29.2, "Initiating an Approval"](#)
- [Section 29.3, "Viewing Approval Details"](#)
- [Section 29.4, "Canceling the Approval Process"](#)
- [Section 29.5, "Approving a Quote"](#)
- [Section 29.6, "Rejecting an Approval"](#)

29.1 Overview of Approvals

Oracle Quoting uses the Oracle Approvals Management (OAM) engine to define rules governing situations requiring approval. Within OAM, a situation or rule requiring approval is defined using Attributes, Conditions, and Approval Type. Each application integrating with OAM must seed the desired Attributes. Attributes are used to define Conditions, and the Approval Type determines the contents and hierarchy of the approvers. One or more Conditions and an Approval Type constitute a Rule.

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

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

29.2 Initiating an Approval

When you initiate an approval, you can view the list of approvers and rules applicable to the quote, if any.

The ability to skip approvers is determined by the profile option *ASO: Allow Skip Approvers*.

Prerequisites

- *ASO: Enable Approvals* must be set to *Yes* at the appropriate level.
- The highest version of the quote must be used.
- There is a transition defined from the current quote status to *Approval Pending*.
- The Pricing and Tax status must be *Complete*.
- The user must have update access to the quote.
- The quote must not be in *Order Submitted* status.
- The quote must not be submitted for batch pricing.

Navigation

Quoting > Quote Header > Actions > Approvals

Notes

You can choose to skip approvers if *ASO: Allow Skip Approvers* is set to *Yes*.

Steps

1. Select **Initiate Approval Process**. The Initiate Approval form displays the list of approvers.
2. Enter comments to send to the approvers.
3. Select **Submit for Approval**.

Successful approval submission is confirmed in a pop-up window. The quote is then *Read-only* and is in *Approval Pending* status.

29.3 Viewing Approval Details

To view approval details:

Prerequisites

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

Navigation

Quoting > Quote Header > Actions > Approvals

Notes

The Approvals form displays details about the approval process, including the approval status.

29.4 Canceling the Approval Process

To cancel an approval process:

Prerequisites

- The quote is in *Approval Pending* status.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote must not be submitted for batch pricing.

Navigation

Quoting > Quote Header > Actions > Approvals

Steps

1. Select **Cancel Approval Process**.

The quote is now in *Approval Canceled* status.

29.5 Approving a Quote

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

To approve a quote:

Prerequisites

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

Navigation

Self Service Applications > Workflow Administrator Web Applications > Worklist

Notes

- **Click Here For Quote Details**

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

Steps

1. Select the linked name of the quote requiring approval and select **Approve**. The Approvals page shows confirmation that the quote was submitted for approval.

29.6 Rejecting an Approval

To reject an approval:

Prerequisites

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

Navigation

Self Service Applications > Workflow Administrator Web Applications > Worklist

Steps

1. Select the linked name of the quote requiring approval and select **Reject**. In Oracle Quoting, the quote status is now *Approval Rejected*.

Negotiating Contract Terms on Quotes

This chapter covers sales contracts.

- [Section 30.1, "Overview of Sales Contracts"](#)
- [Section 30.2, "Viewing Contract Details"](#)
- [Section 30.3, "Authoring and Negotiating Contract Terms"](#)
- [Section 30.4, "Managing Contract Documents"](#)
- [Section 30.5, "Validation"](#)
- [Section 30.6, "Printing Quotes with Contract Terms"](#)
- [Section 30.7, "Order Submission with Contract Terms"](#)

30.1 Overview of Sales Contracts

Note: It is strongly recommended that you implement Approvals if you plan to integrate with Oracle Sales Contracts and use the **Contract Terms** features. Use of the approvals process can help ensure that non-standard contract language receives additional approvals before the contract is presented to the customer. This documentation assumes that the contract terms on a quote are reviewed and approved internally before reaching the customer.

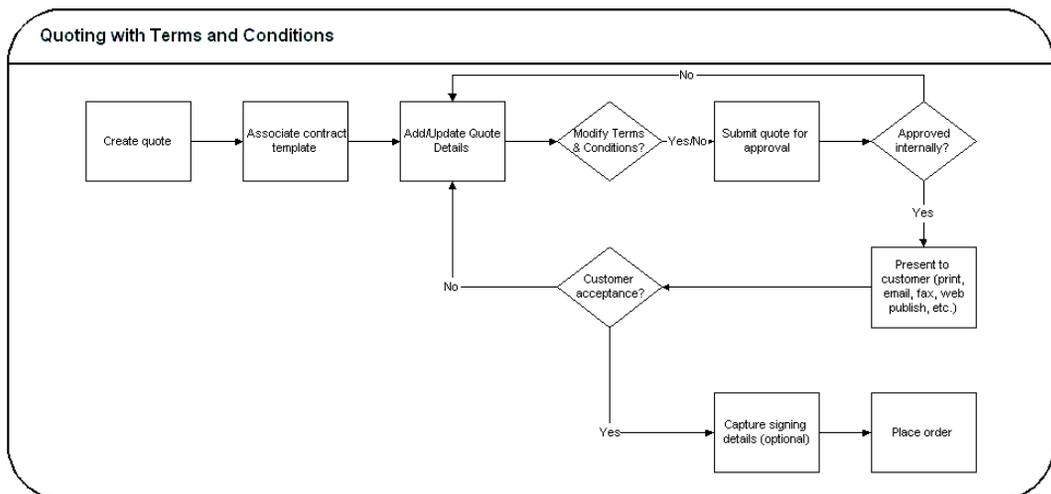
Oracle Quoting integrates with Oracle Sales Contracts to provide functionality to negotiate contract terms on a quote. The objective of Quoting/Sales Contracts integration is to automate the creation and delivery of quotes with standard or

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 *Sales Quote*. Refer to the *Oracle Contracts Implementation and Administration 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



Sales Contracts integration is controlled by the profile option *OKC: Enable Sales Contracts*. If the profile is set to *No*, all fields and options related to Sales Contracts

integration are disabled. Additionally, an error will appear when the users selects the **Contract Terms** hyperlink in the **Overview** page. Consult the *Oracle Quoting Implementation Guide, Release 11i*, for more details.

A prerequisite to perform all procedures mentioned in this chapter is that the profile be set to *Yes*. Additionally, the Contract Terms Library must be set up. Please refer to the *Oracle Contracts Implementation and Administration Guide, Release 11i*, for more details.

30.2 Viewing Contract Details

After selecting a quote to view, you can view contract details by selecting the **Contract Terms** hyperlink from the **Overview** sub-menu. The page displays contract details and customer acceptance information. From this page, you can enter contract acceptance information, and preview and update terms, if you have the appropriate access. This page is read only if:

- The quote is not executable
- The quote does not have an associated contract template
- You are not using the highest version of the quote
- The quote has been submitted for batch processing
- You do not have update access to the quote

Navigation

Quoting > Actions > Contract Terms

Field Behavior

- **Preview Terms**

Selecting the **Preview Terms** button launches a new browser window with the associated contract terms in PDF format. Available only if there is a contract template associated with the quote.

- **Update Terms**

Accesses the **Contract Terms** page. Hidden if one of the following is true:

- You are not viewing the highest version of the quote
- The quote is expired
- The quote is submitted for batch pricing

- The quote status is *Order Submitted*
- You have read-only access and the profile *ASO: Status Override* is set to *No*

30.3 Authoring and Negotiating 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 time of authoring. Contract templates contain standard, pre-approved clauses that are numbered and organized under sections so they appear in the proper order and within their appropriate sections 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 and Oracle Quoting passes the access level, depending on status of the quote and quote security setup, to Sales Contracts.

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.

Multiple users can access and update the contract terms simultaneously. If the following conditions hold true during simultaneous update to the quote and contract terms page, then changes made in the contract terms page will be prevented:

- The quote is changed to a read-only status
- The quote becomes expired
- The quote is submitted for batch processing
- The quote is not at the highest version

An additional level of security, controlling which contract negotiation features a user has access to, is covered in the Function Level Security section of the *Oracle Contract Implementation Guide, Release 11i*.

30.3.1 Associating a Contract Template to a Quote

You can associate a contract template to a quote at the time of quote creation, either from the Create Quote page or the Create Quote From Opportunity page.

Note: If you want to change the contract template later in the Quoting process, you must navigate to the Contract Terms page to do so.

Navigation

Quoting > New > Contract Template

Field Behavior

- **Contract Template**

A default contract template is defaulted from the profile option *ASO: Default Contract Template*.

Steps

You can search for a contract template by selecting the search box.

Results display all valid contract templates that are associated with the document type *Sales Quote*.

30.3.2 Changing Contract Templates

You can change a contract template to a quote from the **Contract Terms** page. Once you create a quote, you can only change the contract template from the **Contracts Terms** page. If you change the contract template, all clauses associated with the

previous contract template are removed. Any manually added clauses will be retained and moved to an unassigned section.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Contract Template field > Change button > Change Contract Template flashlight icon > Search and Select: Contract Template page

Steps

You can search for a contract template by either **Name** or **Description**.

Results display all valid contract templates that are associated with the document type *Quote*.

30.3.3 Removing Terms

You can remove terms from a contract in the **Contract Terms** page.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Remove Terms

Steps

Removing contract terms will remove all its sections, clauses and contract documents.

30.3.4 Adding Sections

You can add sections to the contract in the **Contract Terms** page.

Navigation

Quoting > Actions > Contract Terms > Update Terms > Contract Terms page

Steps

1. Select the section that is after or before the section you want to add or that you want to add a new section within.
2. Select the **Add Section** button and then determine the location of the new section by selecting **After**, **Before** or **Within** from the **Location** drop-down menu.

3. Create the section based on an existing section from the Contract Terms Library or create a new one. If you create a new section, enter a name and description. If you want to create the section based on an existing section, select the **Title** flashlight icon to access the **Search and Select: Title** page, where you can search the Library for existing sections.

30.3.5 Deleting Sections

In the **Contract Terms** page, you can delete a section by selecting the **Delete** icon in that row.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

30.3.6 Searching, Browsing and Adding Clauses

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select the section or sub-section in which you want to add a clause.
2. Select the **Add Clause** button to search for or browse for a clause:
 - Search for a clause using the parameters listed, and click **Go** to view the **Results** sections which displays all clauses that are active of the current system date on which the action is performed. Select the **Show** link for any clause to review the clause text and instruction text.
 - Browse for a clause by folders by selecting the **Browse** button. Select the folder to view the clauses in the folder. Select the **Show** link for any clause to review the clause text and instruction text
3. Select the clause or clauses that you want to add and click **Apply**.

30.3.7 Updating Clauses

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select the **Focus** icon beside a section or sub-section name to see the clauses in the section.
2. Select the **Update** icon in the row of clause you wish to update.
3. In the **Update Clause** page, select the **Make Non-Standard** button.
4. Make the necessary changes.

Note: If the Protect Text check box is selected, you cannot update the clause.

5. Optionally, if you have added variables to the clause, you can select the **Value** flashlight icon beside the variable to select a value. You can then insert the variable into the text by selecting the place in the text where the variable is to be added, and selecting the **Insert** icon in the **Clause Variables** section.

30.3.8 Deleting Clauses

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select the **Focus** icon beside a section or sub-section name to see the clauses in the section.
2. Select the **Delete** icon in the row of clause you wish to delete.

30.3.9 Creating Non-Standard Clauses

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select either a section, sub-section, or clause and then select the **Add Clause** button.

2. In the **Add Clause** page, select the **Create Non-Standard Clause** button.
3. Enter the following parameters:
 - **Clause Title**
 - **Type**
 - **Clause Text**

Optionally, you can also fill out the **Display Name** and **Description** parameters.

4. Optionally, you can add variables by selecting the **Add Variables** clause. In the **Add Variables** page, search for a variable by **Name**, **Description**, or **Type**. Click **Go**, and then select the variable name you wish to include.
5. If have added variables to the clause, you can select the **Value** flashlight icon beside the variable to select a value. You can then insert the variable into the text by selecting the place in the text where the variable is to be added, and selecting the Insert icon in the **Clause Variables** section. For more information on clause variables, consult the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

30.3.10 Creating a Non-Standard Clause from Standard Clauses

You can create non-standard clauses from a standard clause.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select a clause and then select the **Update** icon.
2. In the **Update Clause** page, select the **Create Non-Standard Clause** button.
3. Make the appropriate changes.

Note: If the **Protect Text** check box is selected, you cannot update the clause.

30.3.11 Comparing Standard and Non-Standard Clauses

You can compare the text of two clauses when you have created a non-standard clause in a quote from a standard clause, and want to compare the non-standard clause with the original standard clause.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select a clause name hyperlink to access the **View Clause** page.
2. In the **View Clause** page, select the **Compare to Standard Clause** button.
3. The **Compare Clauses** page displays a redline comparison of changes made to the clause text. Inserted text is underlined, deleted text is marked with a strike-through line.

Note: Changes to embedded variables within clause text are not compared on a quote. Variable tags are compared, not variable values.

30.3.12 Moving Contract Terms

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page

Steps

1. Select either a section or clause to move and select the **Move** button.
2. In the **Move Term** page, select the destination location: **Before Selection**, **After Selection**, or **Within Selection**.
3. Select the appropriate radio button as the destination for the clause or section.
4. After clicking **Apply**, you will need to manually renumber the contract terms. Refer to [Section 30.3.13, "Renumbering Contract Terms"](#) for more information.

30.3.13 Renumbering Contract Terms

After making any changes such as moving or deleting sections and clauses, the contract terms must be manually renumbered. Numbering schemes are defined in the Contract Terms Library. For more information, please see the *Defining Numbering Schemes* section of *Oracle Contracts Implementation and Administration Guide*.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Renumber button

Steps

In the **Renumber** page, select a numbering scheme from the **Pick Numbering Scheme** drop-down list. You may preview the numbering scheme before applying the changes to the contract terms.

30.3.14 Resolving Alternate Clauses

Some clauses in the quote may have alternate clauses that you can choose from. Access the **View Clause** page by selecting a clause name hyperlink from the **Contract Terms** page to view and choose any clause alternates.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Clause name hyperlink

30.3.15 Checking for Clause Updates

Use the **Check for Clause Updates** function to view the list of clauses that have newer versions in the library, and then select the applicable ones to apply to the contract terms. This feature checks for latest updates for only those clauses that are currently in the contract.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Check for Clause Updates > Compare Text icon

Steps

Review differences between the current and library versions, and then select the clauses you want to update.

30.3.16 Entering and Updating Clause Variables

In the **Update Variable Values** page, you can perform one or more of the following operations for each variable:

- Select the variable. The clauses that contain the selected variable appear in the **Clauses** section in the lower part of the page.
- Select the **Global Value** flashlight icon to set a global value for the variable.
- For each clause that uses that variable, select the **Value** flashlight icon to set a specific value for the variable in that clause.

For more information on creating variables, consult the *Oracle Contracts Implementation and Administration Guide, Release 11i*.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Update Variable Values

30.4 Managing Contract Documents

Contract documents are files manually attached to a quote that represent or related to the quote's contractual terms. There are three categories of contract documents that can be added to your quote:

- **Contract:** a soft-copy document representing the entire formatted contract, created during the authoring of this contract.
- **Contract Image:** a scanned image of a hardcopy of the signed contract. Is attached manually to the contract document of any status.
- **Supporting Document:** any document such as an e-mail, fax, image, or spreadsheet.

While the quote is in draft mode, the user can add, update and delete the attached contract documents. You can have as many contract documents of each document category attached to the quote as you require.

30.4.1 Viewing Contract Documents

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions Menu > Manage Contract Documents > Manage Contract Documents page

Notes

To view the contract documents for a particular **Document Category** and **Quote Version**, choose the proper category and version from the lists of values.

30.4.2 Adding Contract Documents

You can add additional documents from your desktop. When you add a contract document from your desktop, you must specify the description and the category. When you update a contract document, and it was originally added from the desktop, you can change the description and the document category.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions Menu > Manage Contract Documents > Manage Contract Documents page > Actions Menu > Add New Document > Add Contract Document page

30.4.3 Deleting Contract Documents

You can delete contract documents in the **Manage Contract Documents** page. Select the **Delete** icon in the row of the contract document you wish to delete.

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions Menu > Manage Contract Documents > Manage Contract Documents page

30.5 Validation

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

Validation ensures that customers are prevented from seeing invalid contract clauses, such as:

- 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 required and occurs automatically prior to the following 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*.

To manually validate a contract:

Navigation

Quoting > Actions > Contract Terms > Update Terms button > Contract Terms page > Actions menu > Validate

Note: The automatic validation of clauses occurs when you Initiate an Approval for a quote, Web Publish a quote, or Print a quote. If there are validation warnings, a page will display the warnings. You can continue if there are only warnings.

30.6 Printing Quotes with Contract Terms

To print quotes containing contract terms, you must use the Oracle XML Publisher printing solution. Set the profile option *ASO: Print Quote Method* to *XML Publisher*.

The Oracle XML Publisher printing solution provides the ability to generate a printable PDF document that can be formatted according to a business' layout

requirements. The layout of the quote printout and Contract Terms preview 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.

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 and printed in executable mode, 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 and heading for each section
- The ordered list of clauses within each section, with the sequence, label, and clause text for each clause

Note: Multiple XSL-FO Stylesheets may be created for use with Quote Printing, however only one stylesheet (template) may be specified (via profile *ASO: Default Layout Template*) for Contract Terms Preview.

To print a quote with contract terms:

Prerequisites

- *OKC: Enable Sales Contracts* must be set to *Yes* at the appropriate level.
- *ASO: Print Quote Method* must be set to *XML Publisher*
- A layout template (stylesheet) must be registered with XML Publisher Template Manager and specified in the profile option *ASO: Default Layout Template*.

Navigation

Quoting > Actions > Print Quote

Steps

Select the options to be included on the print out and click **Submit**.

If there are validation issues, a page may display warnings.

Depending on your browser setting, either a browser window opens displaying the printout or you are asked to open or save the printout. If you need a paper copy of the quote, choose your browser's Print option to print the quote.

30.7 Order Submission with Contract Terms

Upon order placement, the quote is submitted to Order Management. All negotiated terms, signing details, and attached contract documents on the quote become part of the Sales Order and can be referenced from Order Management.

Enabling Quoting Security

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

- [Section 31.1, "Overview of Security"](#)
- [Section 31.2, "Adding a Resource to the Quote Sales Team"](#)
- [Section 31.3, "Changing the Primary Salesperson"](#)

31.1 Overview of Security

Quoting Security has three essential components:

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

Quote Access Security

Quote Access Security designates which quotes are available to the user. Users should have access only to quotes for the sales team that both the user and the user's subordinates belong to.

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

Quote Function Security

Quote Function Security determines whether or not there are user restrictions on particular quote functions. For example, a user may be restricted from placing

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

New Quote Security

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

Primary Salesperson

The Primary Salesperson for a quote has quote ownership responsibility. This is not necessarily the same individual who creates the quote. If the quote creator meets the Primary Salesperson criteria, the quote creator will default as the Primary Salesperson.

If *ASO: Automatic Sales Team Assignment* is set to *None* and the quote creator does not meet these criteria, the sales representative selected in the profile option *ASO: Default Salesrep* will default as the primary salesperson. For more information on Primary Salesperson, see the *Oracle Quoting Implementation Guide*.

In order to be a Primary Salesperson, the user must:

- Be a valid resource, set up in Resource Manager
- Be set up as a sales representative

Note: You cannot save or submit a quote without a primary salesperson. If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*, a primary salesperson will be automatically selected after you save the quote.

31.1.1 Quote Access Security

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

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

31.1.1.1 Quote Availability Security

Quote availability security restricts the quotes available to each user. A user must be set up as a valid resource in order to view quotes when security is enabled. If the user is a valid resource, all quotes where the user is on the quote sales team are available. This includes all quotes created by the user and, by other users on the quote sales team.

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

- All quotes where the user is on the quote sales team
- All quotes where the user's subordinates are on the quote sales team

31.1.1.2 Quote Data Security

Once it is determined what quotes are available to a user, Quote Data Security determines whether the user has update access to these quotes. The Full Access flag, located next to each resource on the Sales Team tab, designates the level of access. If the Flag is selected, the user has full update access to quotes. If the flag is not selected, the resource has view-only access.

If a user has update access to a quote, the user can modify any quote field and perform any function that is not restricted by other Quoting requirements. If the quote is changed to a read-only status, the user may only update the payment information and other fields that are updateable in read-only statuses.

If a user has view-only access to a quote, the user cannot modify fields or perform any function on the quote. When a quote is changed to a read-only status, the user cannot update payment information or other updateable fields.

Manager Access

Whether or not managers can access quotes for the sales team their subordinates belong to is controlled by the profile option *ASO: Manager Role Access*. If the profile is set to *Update*, the manager can update all quotes for their subordinates' sales teams. If the profile is set to *Inherit*, the manager has the same access level as the subordinate. If the profile is set to *Inherit* and the manager has more than one subordinate on the team with different access levels, the manager should inherit the highest access level.

31.1.2 Quote Function Security

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

- Override a quote status — The value of profile option *ASO: Status Override* controls a user's ability to update a quote when it is in a read-only status. This will ensure that the user can override quote data if a mistake was made prior to transitioning the quote to a read-only status.
- Override the price list — The value of profile option *ASO: Price List Override* controls a user's ability to change the selected price list for a quote. This functionality ensures that a user does not inadvertently quote an inaccurate price based on an incorrect price list selection.
- Create new customers — The value of profile option *ASO: Create New Customer* controls a user's ability to create new customer information. This functionality ensures that customers wishing to protect the integrity of customer data can restrict the creation of new customers to a limited number of users.
- Update customer information — The value of profile option *ASO: Update Customer* controls a user's ability to update existing customer information.
- Update sales team information — The value of profile option *ASO: Update Sales Team* controls the user's ability to manually update sales team information, including addition or removal of members, changing access levels, and manual assignment of the primary salesperson.
- View and Update sales credit information — The values of profile options *ASO: Modify Sales Credits* and *ASO: View Sales Credits* determine if users can view and/or modify sales credit information

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

Sales Team Security

Sales team security is controlled by the profile option *ASO: Update Sales Team*. If you set this profile to *Yes* for a given user, that user is able to:

- Add or remove a valid resource to/from the sales team
- Specify or change access levels for sales team members
- Designate a primary salesperson

If set to *No*, the user cannot update the sales team in any way.

If set to *Partial*, the user can perform the following activities, only if the:

- Add or remove another resource to/from the sales team if the user and the resource are part of the same sales group
- Change sales team details for an existing sales team member, only if both members are part of the same sales group.
- Change the primary salesperson and/or primary sales group

Note: Since sales team members can be part of multiple sales groups, Quoting uses the Current sales group when the profile *ASO: Update Sales Team* is set to *Partial*. In Forms, the current sales group is obtained from *OTS: Default Group*, or if that is not set, from *OTS: Default User Role and Sales Group*.

Sales Credit Security

Quoting provides function security that determines which sales credits a user can view and whether the user can modify sales credit information on a quote.

The profile option *ASO: Modify Sales Credits* governs a user's ability to modify sales credit information, including:

- Adding or removing sales credit receivers
- Entering sales credit percentages
- Entering sales groups
- Entering credit types

If this profile is set to *Yes* for a user, that user can modify sales credit information for all sales credit receivers on the quote.

If set to *Partial* for a user, the user can modify sales credit information for their subordinates, as well as their own information.

For users that do not have the ability to modify sales credits, there are three levels of privilege for viewing sales credit information on a quote.

Note: If the group context is not set for a quote (*OTS: Default Group* is not set), a user will not be able to modify sales credits even if *ASO: Modify Sales Credits* is set to *Yes*. The user will only be able to view sales credits.

- If the profile *ASO: View Sales Credits* is set to *Yes* for a user, the user can view all sales credit information on the quote.
- If set to *Partial* and the user has a manager role in the sales group, the user can view his/her own sales credit information as well as the information for their subordinates. If the user is not a manager, the user can view only his/her own sales credits.
- If set to *No*, users can only view their own sales credit information.

For users that cannot modify sales credit information, Quoting will show the total credit percentage for each sales representative/group combination instead of showing revenue and non-revenue credits separately.

31.1.3 New Quote Security

New Quote Security restricts the parties for which a sales agent can create quotes. New Quote Security is governed by the profile option *ASO: New Quote Security*. If set to *Yes*, a user cannot create new standalone quotes. This includes copying existing quotes to new quotes.

Note: Setting this profile to *Yes* does not restrict a user's ability to create quotes from opportunities.

If this profile is set to *No*, the user can create quotes for all customers. If the profile option is set to *Sales Team*, the user must be on the account sales team in order to select that customer in the quote header.

Note: When Oracle Quoting is integrated with Oracle TeleSales, account sales team information is collected from Oracle TeleSales.

31.2 Adding a Resource to the Quote Sales Team

You can add resources to the quote sales team, if you have *ASO: Update Sales Team* set to *Yes* at the appropriate level.

Note: The Keep Flag is supported in this release only if automatic sales team assignment is enabled.

Use the following procedure to add a resource to the quote sales team.

Prerequisites

- The profile *ASO: Update Sales Team* must be set to *Yes* or *Partial* at the appropriate level.

Navigation

Quoting > Quote Header > Actions > Sales Team

Field Behavior

- Primary Salesperson
The Primary Salesperson is automatically populated in this form. Refer to the Primary Salesperson section within [Section 31.1, "Overview of Security"](#) for more information.
- Full Access
If selected, the sales team member has the ability to update quotes for which they are on the sales team.

Steps

1. Search for and select a resource. The Sales Team lists the new sales team member.

31.3 Changing the Primary Salesperson

To assign a new primary salesperson:

Prerequisites

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

Navigation

Quoting > Quote Header

Steps

1. Use the Salesperson LOV to select a new primary salesperson.

2. Save the quote.

The new primary salesperson shows up in the Sales Team form with the Primary flag checked.

Assigning Sales Teams and Allocating Sales Credits

This chapter outlines the procedures necessary to allocate sales credits.

- [Section 32.1, "Overview of Sales Team Assignments"](#)
- [Section 32.2, "Assigning a Sales Team Using Territory Manager"](#)
- [Section 32.3, "Overview of Sales Credit Allocation"](#)
- [Section 32.4, "Overview of Projected Commission"](#)
- [Section 32.5, "Performing an Automatic Sales Credit Allocation"](#)
- [Section 32.6, "Performing a Manual Sales Credit Allocation"](#)
- [Section 32.7, "Viewing Sales Credits"](#)
- [Section 32.8, "Viewing Projected Commission Calculations for a Quote"](#)

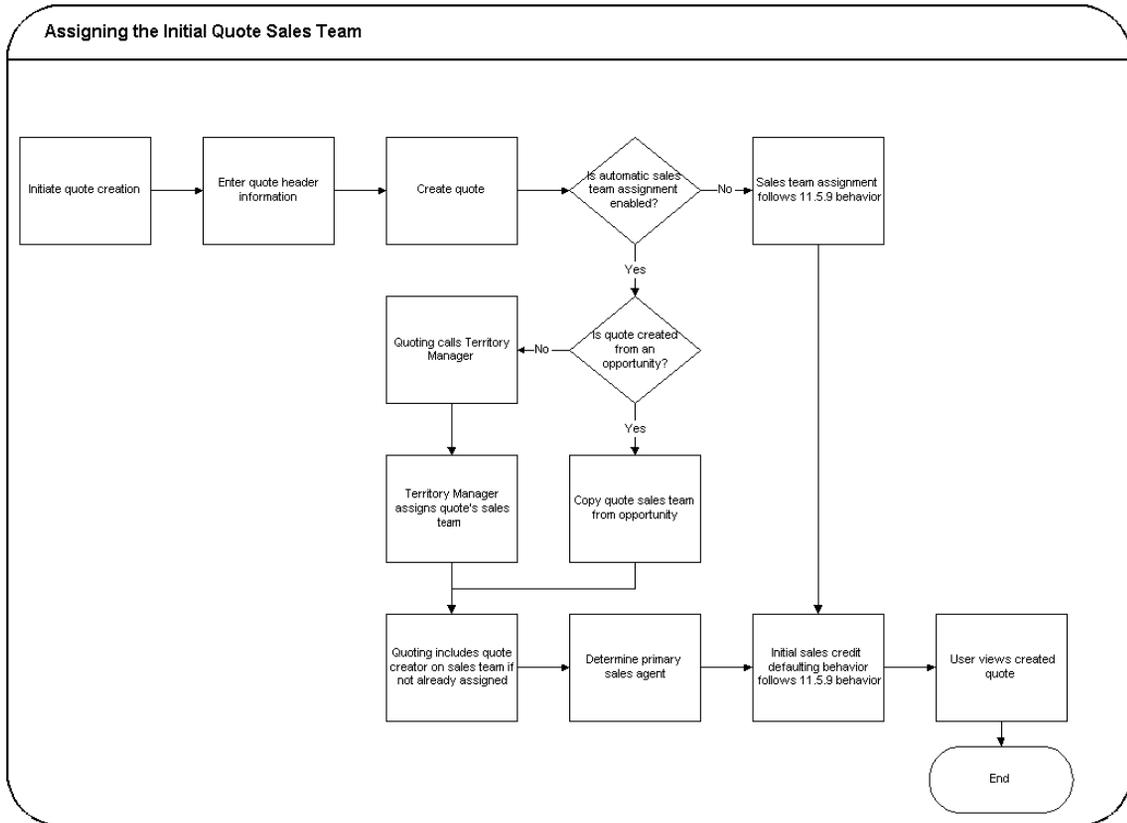
32.1 Overview of Sales Team Assignments

Integration with Oracle Territory Manager allows Quoting to ensure that the correct resources can access a quote. This integration is controlled by the profile option *ASO: Automatic Sales Team Assignment*. If set to *Partial*, Quoting calls Territory Manager to assign quotes sales teams at quote creation, and on user request. If set to *Full*, Quoting calls Territory Manager to assign quote sales team at quote creation, order submission, and on user request.

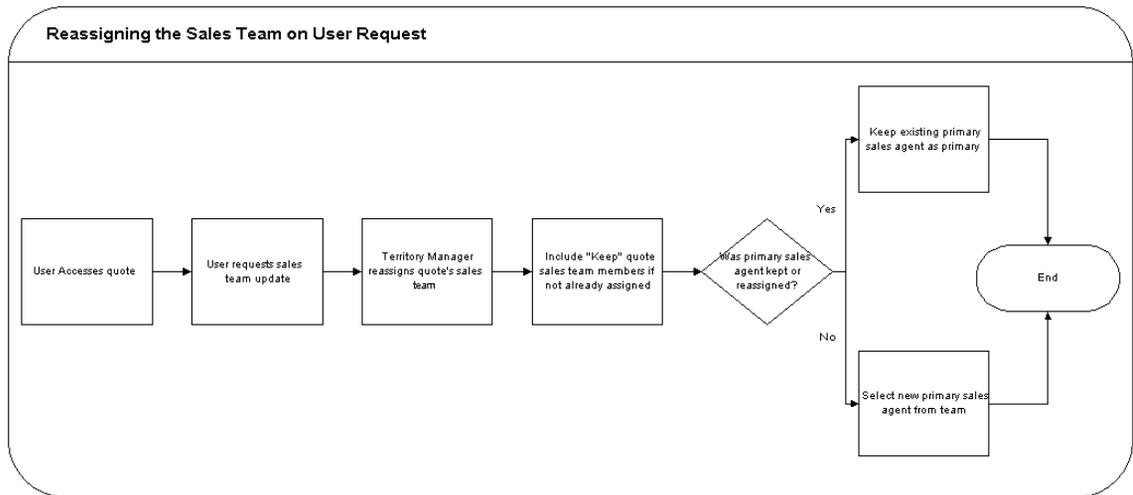
Note: If this profile option is set to either *Full* or *Partial* and sales credit allocation is enabled, Quoting calls Territory Manager for sales team assignments when a user requests a sales credit update.

Sales teams and territories are set up in Oracle Territory Manager. 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 as well as customers and geography.

Quoting then uses these territories to derive sales teams for quotes. The following diagram shows how Quoting determines the initial quote sales team.



The following diagram shows how Quoting assigns the sales team upon user request.



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

- Resource
- Group
- Role — Only appears in the UI if Automatic Sales Credit Allocation is enabled
- Territory ID — Territory ID does not appear in the UI. It is only stored in the database for reporting purposes.
- 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.

Keep Flag

The Keep Flag indicates whether a resource will be preserved on the sales team during sales team assignment. Any resource without the Keep Flag enabled will only remain on the quote sales team if the Territory Manager reassigns them. This includes the quote creator and primary salesperson. Additionally, if the Keep flag is selected for a resource on the sales team, the Full Access flag, role, and group will also not change based on Territory Manager settings.

Primary Salesperson Assignment

If *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*, the Primary Salesperson is selected at quote creation as follows, regardless of whether the 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 salesperson.
- If the quote creator is not a valid sales representative, the primary salesperson is selected randomly from valid sales representatives on the team with full access.
- If there are no valid sales representatives on the sales team with full access, the primary salesperson 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 salesperson is removed from the sales team during automatic sales team assignment, a new primary salesperson 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 the criteria, the primary salesperson is defaulted from *ASO: Default Salesrep*.

32.2 Assigning a Sales Team Using Territory Manager

Depending on the value set for the profile option *ASO: Automatic Sales Team Assignment*, the sales team assignment process can be automatically triggered. Refer to [Section 32.1, "Overview of Sales Team Assignments"](#) for more information.

To manually call Territory Manager for sales team assignment:

Prerequisites

- *ASO: Automatic Sales Team Assignment* must be set to *Full* or *Partial*.
- The quote must be updateable.

- The user must have update access to the quote.

Navigation

Quoting > Actions > Sales Team

Steps

1. Click **Reassign Team**.
2. Quoting calls Territory Manager, which updates the sales team resources and their information.

If Territory Manager does not assign valid resources for the sales team, the quote sales team will not be updated. It will remain the same as it was before the reassignment request.

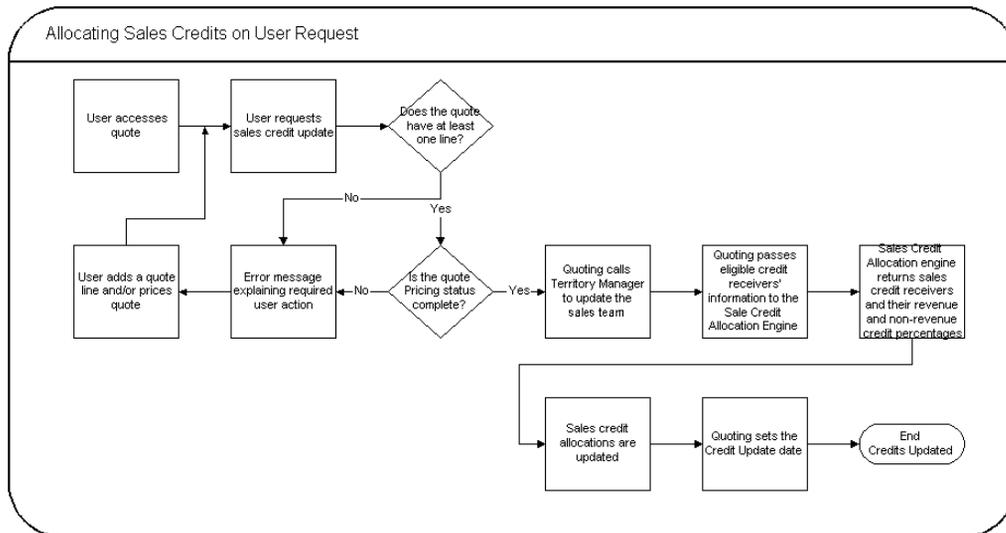
32.3 Overview of Sales Credit Allocation

Through integration with Oracle Incentive Compensation (OIC) or another sales credit allocation engine, you can automatically determine sales credit allocations for quotes. After updating the sales team using Oracle Territory Manager, Quoting will pass the sales representatives and their roles to the sales credit allocation engine. The sales credit allocation engine then returns the allocations based on administrator-defined rules.

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 the *Oracle Quoting Implementation Guide* for more information.

Note: Sales Credit Allocation must be used in conjunction with Automatic Sales Team Assignment. Therefore, if *ASO: Automatic Sales Credit Allocation* is set to *Full* or *Partial*, then *ASO: Automatic Sales Team Assignment* must also be set to *Full* or *Partial*.

It is particularly important that sales credit allocations are correct when an order is placed. Therefore, you can enable Quoting to automatically call the sales credit allocation engine when you attempt to submit an order.



Depending on the setup, sales credit allocation takes place either 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 the sales credit allocation engine. The sales credit allocation engine determines the credit distribution. The quote is then updated with this distribution.

Eligible Sales Credit Receivers

To be eligible to receive sales credit allocations, a resource must:

- Be a valid sales representative
- Be on the quote's sales team
- Have a specified role on the team

Note: Only roles of role type Sales, TeleSales, Field Sales, or Partners Relationship Management can be specified on the sales team.

You can manually enter sales credit information for sales representatives that do not meet these criteria.

Once the application has determined which sales representatives are eligible, it passes the resources and roles to the sales credit allocation engine. In turn, the sales credit allocation engine returns the following information for each receiver:

- Resource
- Revenue Type
- Credit Allocation Percentage

If the sales credit allocation engine 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 you are using the OIC sales credit allocation engine, this may happen when the OIC profile **Total Rev% is not 100** is set to **No**. This profile option can also be set to the following values:

- Even distribution — The remaining revenue percentage will be distributed evenly among the existing sales roles
- Weighted Average — The remaining revenue percentage will be based on a weighted average
- Custom — Custom code can be added

If the sales credit allocation engine returns revenue credits totalling 0% or null, Quoting will not uptake the transaction's credits. 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.

32.4 Overview of Projected Commission

Note: You cannot use projected commission functionality unless sales team assignment and sales credit allocation are enabled. *ASO: Automatic Sales Team Assignment* must be set to *Full* or *Partial*, *ASO: Automatic Sales Credit Allocation* must be set to *Full* or *Partial*, and *ASO: Calculate Projected Commission* must be set to *Yes*.

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

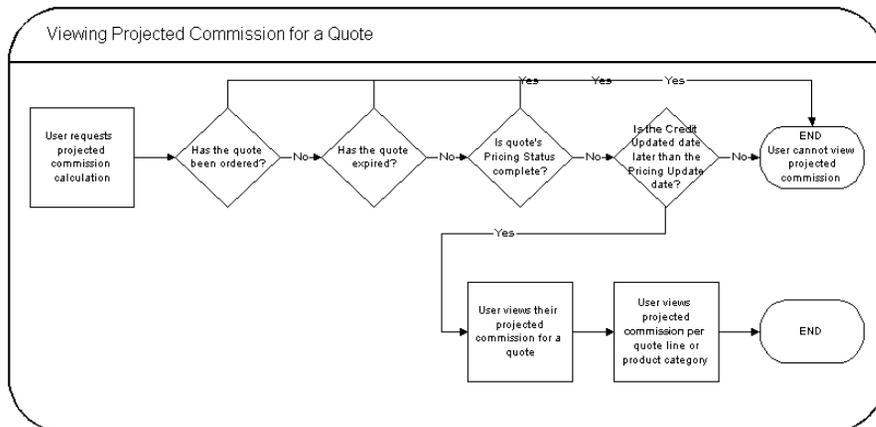
- An entire quote
- Each quote line
- Each product category

This information is useful, as the ability to view projected commissions can help to motivate sales representatives and encourage them to sell more and to sell particular products.

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



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.

32.5 Performing an Automatic Sales Credit Allocation

To perform a sales credit allocation:

Prerequisites

- *ASO: Automatic Sales Credit Allocation* must be set to *Partial* or *Full*
- *ASO: Automatic Sales Team Assignment* must be set to *Partial* or *Full*
- The quote must have at least one line
- The Pricing Status must be *Complete*
- The quote must have a Primary Salesperson
- To allocate sales credits per line, *ASO: Run Sales Credit Update for Quote Lines* must be set to *Yes*.
- The user has update access and the quote is updateable

Navigation

Quoting > Quote Header

Steps

1. Select **Actions > Automatic Sales Credit Update**.

After the sales credit allocation engine returns the credit receiver information, the credit update date is stored and displayed in the UI.

32.6 Performing a Manual Sales Credit Allocation

You can perform this procedure without automatic sales credit allocation enabled. Yet, you can still enter manual sales credits if automatic sales credit allocation is enabled.

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.

When there are multiple sales representatives involved in a sales process, you may need to allocate sales credits appropriately.

If you do not specify header level sales credits, the header level sales credit defaults 100% to the primary salesperson. Sales credits entered at the header level default to the line level during the sales compensation calculations.

Sales credits can also be specified at the line level. If changes are made at the line level and additional changes are made later at the header level, the header level changes will not be reflected at the line level.

You can allocate sales credits to any resource who is set up as a valid sales representative for the quote-to customer. A sales representative can only be listed once for each credit type on the Credit Allocation form.

To allocate sales credits at the header and line levels to any number of sales representatives:

Prerequisites

- The resource for sales credit allocation must be set up in Oracle Receivables as a valid sales representative for the quote-to customer.
- *ASO: Modify Sales Credits* must be set to *Yes*, or *Partial* (and the user is the current group's manager). Otherwise sales credits are read-only.

Navigation

Quoting > Quote Header > Actions > Assign Sales Credits

Quoting > Lines > Actions > Assign Sales Credits

Notes

Credit types are set up in Order Management using the Sales Credit Type form. Each sales credit is classified as a revenue or non-revenue sales credit type.

- Revenue sales credit — A sales credit you assign to salespeople based on your invoice lines. The total of all revenue sales credits must equal 100% of your invoice lines amount. Also known as a quota sales credit because it is applied to the sales representatives' quotas.
- Non-revenue sales credit — A sales credit you assign to your salespeople not associated with your invoice lines. This is given in excess of your revenue sales credits. Also known as a non-quota sales credit because it is not usually applied to the sales representatives' quotas.

Steps

1. To allocate a sales credit at the header level, place the cursor in the header of the Oracle Quoting form.

To allocate a sales credit at the line level, place the cursor in the Quote Lines tab.

2. Select **Actions > Assign Sales Credits > OK**.
3. Use the Salesperson LOV to select the sales representative for sales credit allocation.
4. Optionally, select a Sales Group for the salesperson.

Note: Since sales team members can be part of multiple sales groups, Quoting uses the Current sales group when a manual sales credit allocation is performed. In Forms, the current sales group is obtained from OTS: Default Group and OTS: Default User Role, and ASO: *Default Salesgroup*.

5. Use the Credit Type LOV to enter the type of sales credit.
6. Enter the percent of the allocation.

Note: The Revenue Total box must be blank or equal 100%.

7. Repeat this process for each sales representative credit allocation.
8. Select **Apply** to save your changes.

32.6.1 Removing a Sales Credit Receiver

To remove a sales credit receiver:

Navigation

Quoting > Actions > Assign Sales Credits (header)

Quoting > Quote Lines tab > Actions > Assign Sales Credits (line)

Steps

1. Select the sales representative and select **Remove**.

The sales representative credits are removed and the Revenue and Non-Revenue totals are recalculated.

2. Select **Apply** to apply the change and return to the main Quoting form.

Note: If you remove a sales credit allocation and select **Cancel** instead of **Apply**, the allocation will not be removed from the quote even though it disappears when you select **Remove**. You must select **Apply** to apply the change to the quote.

32.7 Viewing Sales Credits

To view sales credits for a quote:

Prerequisites

Either *ASO: Modify Sales Credits* must be set to *No* or *ASO: Modify Sales Credits* must be set to *Partial* AND the user is not a manager in the current sales group.

Navigation

Quoting > Actions > View Sales Credits (header)

Quoting > Quote Lines tab > Actions > View Sales Credits (line)

32.8 Viewing Projected Commission Calculations for a Quote

To view projected commission for a quote:

Prerequisites

- *ASO: Calculate Projected Commission* is set to *Yes*
- *ASO: Automatic Sales Credit Allocation* is set to *Full* or *Partial*
- *ASO: Automatic Sales Team Assignment* is set to *Full* or *Partial*
- The quote is in the highest version
- The quote is not in the *Order Submitted* status
- The quote is not expired
- The quote Pricing Status is *Complete*
- The Credit Update Date is later than the Pricing Update Date

Navigation

Quoting > Quote Header

Steps

1. Click **Actions > View Commission**.

Quoting calls Oracle Incentive Compensation to calculate projected commissions. OIC returns the commissions and Quoting displays a summary with totals by product category and quote line.

Notes and Attachments

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

- [Section 33.1, "Overview of Notes and Attachments"](#)
- [Section 33.2, "Viewing and Adding Notes to a Quote"](#)
- [Section 33.3, "Creating an Attachment"](#)
- [Section 33.4, "Deleting an Attachment"](#)
- [Section 33.5, "Copying an Attachment from Another Quote"](#)

33.1 Overview of Notes and Attachments

Notes contain descriptive information generated by users about specific quotes.

Users can add attachments to their quotes allowing them to store relevant documents or files. Attachments include communications from customers or sales representative's notes about a quote.

33.2 Viewing and Adding Notes to a Quote

Use this procedure to create notes for a quote. Notes contain descriptive information generated by users about business transactions.

Prerequisites

The quote for which you want to create a note must be displayed in the Oracle Quoting main form.

Navigation

Quoting > Actions > View Notes

Field Behavior

- Summary tab

Displays the user, date created, entered by ID, and the first line of note text for the highlighted note. Use the arrow key to scroll through and view information for each note.

- More

Allows you to enter additional text beyond the character limit in the main notes text box.

Note: User will no longer be able to see the notes automatically whenever:

- Notes are copied from an existing Quote to a New Quote (FORMS UI ONLY)
- Notes are copied from an existing Quote to a New Quote Version (FORMS AND HTML UI)
- Notes are copied from an opportunity (FORMS AND HTML UI)

In the above mentioned cases, User has to explicitly query to see those Notes. To View these notes without explicitly executing a query in Quoting UI, Customer has an option to apply ATG Notes component patch B (2673637).

Steps

1. Select **New** and enter the note text into the Notes field.
2. Select the note type and status.
3. Enter related objects in the Related To field.

You can relate the note to any object as well as to the active quote. The note can have multiple relations.

4. Use the Value LOV to enter a valid reference number for the related section.

33.3 Creating an Attachment

There are five types of documents you can attach to a quote:

- **Document Reference** — A reference to any type of document stored in a database accessed through a Document Management system.
- **Short Text** — Text stored in the database containing less than 2000 characters.
- **Long Text** — Text stored in the database containing 2000 characters or more.
- **File** — A file that requires other server applications to view.
- **Web Page** — A URL reference to a web page that you can view with a web browser.

You can create attachments at the header or line level.

To create an attachment for a quote:

Prerequisites

- The Oracle Quoting form must display the quote to which you want to add an attachment.
- The user must save the quote before creating an attachment.
- To create attachments at the header level, place the cursor in a header field and follow the instructions below.

To create attachments at the line level, place the cursor in a line level field and follow the instructions below.

Navigation

Quoting > Attachments form

Field Behavior

- Paper Clip Icon
Opens the Attachments form.

Steps

1. Select a Category and enter a description for the attachment.

The Category controls which applications can access the attachment. The default category is **Miscellaneous**, as this category is viewable from all applications with attachments enabled.

2. Select the Data Type.

The attached document can be any of the following data types:

- **Short Text**

- **Long Text**

If the Data Type is **Long Text** or **Short Text**, a text field is enabled on the form where you can directly input text.

- Enter the attachment text into the text form.
- Save your work.

- **Document Reference** - A reference to any type of document stored in a database accessed through a Document Management system.

- **File**

If the Data Type is **Document Reference** or **File**, you must upload your file.

- Once you select either **Document Reference** or **File** as the Data Type, the Upload a File window displays.

- **Browse** for and select your file. Select OK.

If the file uploaded successfully, you will see a confirmation message.

- Close the browser to return to the Attachments form.
- Select **Open Document** to view your attached file.

- **Web Page**

If the Data Type is **Web Page**, you must enter a source in the Source tab.

- The Source tab automatically displays when you select **URL** from the data type list.
- Type in the URL for the web page in the File or URL field.
- Select **Open Document** to view your attached file.

For more information on attachments, refer to the *Oracle Applications User's Guide*.

33.4 Deleting an Attachment

When you delete an attachment, you remove the association between the attached document and the quote.

To remove an attachment from a quote:

Prerequisites

- The quote containing the attachment(s) you want to delete must be displayed in the Oracle Quoting form.
- To view header attachments, place the cursor in a header level field.
To view line attachments, place the cursor in a line level field.

Navigation

Quoting > Attachments

Steps

1. Select the attachment to remove and select Edit > Delete.
2. A decision window appears asking if you want to delete the attachment, or the document and the attachment.
 - Select **Attachment** to delete the attachment to the file. The file still exists in the Document Catalog.
 - Select **Document and Attachment** to delete the attachment and delete the file from the Document Catalog.

33.5 Copying an Attachment from Another Quote

To copy an attachment from another quote:

Prerequisites

- The Oracle Quoting form must display the quote to which you want to add an attachment.
- The user must save the quote before adding an attachment.

Navigation

Quoting > Attachments

Steps

1. Select **Document Catalog**.

2. Enter the search criteria into the Find Existing Documents section and click **Find**.

You can search using the description, category, data type, attached to, file or URL, or usage.

3. Select the attachment and close the browser to return to the Attachments form.
4. Select **Attach**.

The Attach button lists the number of attachments you are adding to your quote.

Publishing and Printing

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

- [Section 34.1, "Overview of Printing"](#)
- [Section 34.2, "Printing a Quote"](#)
- [Section 34.3, "Overview of Publishing Quotes"](#)
- [Section 34.4, "Web Publishing a Quote"](#)

34.1 Overview of Printing

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

The print outs for Print Quote vary depending on whether or not the quote is *executable*. A quote is *executable* if there is a valid transition from the current quote status to *Order Submitted* status. The non-executable Print Quote report displays a customizable disclaimer in addition to the following key information:

- Quote information — Quote number, revision, date, expiration date, header level payment term
- Customer information — Customer name, address, email address, and phone number; ship-to customer name, address, and phone number; bill to customer name, address, and phone number
- Pricing Agreement information — Agreement name, number, revision, and revision date

- Line information — Product number and description, UOM, Qty, Unit Net Price, Total Net Price, Sales Tax, Configurations for model products, Total price for model products
- Attachments — Text type header and line attachments that are associated with the document category **Miscellaneous**
- Charges — Quote line level charges, quote header level charges, and a summary of charges for entire quote
- Tax — A summary of tax charges, including tax code and tax rate
- Sales Supplement — Header and line level sales supplement details including template name, sections, components, and component responses
- Contract Information — Contract terms for a contract associated with the quote

Note: Contract information is only available on the printed quote report if Sales Contracts integration is enabled and *ASO: Print Method* is set to *XML Publisher* and a valid contract is associated with the quote.

The following sections are added if the quote is executable:

- Signature block

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

34.2 Printing a Quote

To print a quote:

Prerequisites

- The highest version of the quote must be used.
- The quote must be saved.
- The Pricing status must be **Complete**.
- The Tax status must be **Complete**.
- The quote must not be submitted for batch pricing.

Navigation

Quoting > Quote Header > Actions > Print Quote

Notes

Depending on your browser, either a browser window opens displaying the printout or you are asked to open or save the printout. If you need a paper copy of the quote, choose your browser's Print option to print the report.

Field Behavior

- **Output Format**

If using the Oracle Reports print option, the seeded output formats are: PDF format or Rich Text Format (RTF). If using the XML Publisher print option, all reports are printed in PDF format.
- **Show Price Adjustments**

If checked, price adjustments and list prices will print.
- **Show Charges**

If checked, charges details appear on the quote printout. If unchecked, charges details are not printed but, total charges are displayed in the Subtotal section of the printout
- **Show subtotal by product category**

If checked, the subtotal for each product category will be printed at the end of the report. Use product categories belonging to the default category set for the Order Management functional area.
- **Template**

If using the Oracle Reports printing option, the seeded default template is Default Print Layout. Values sourced from Order Capture lookup ASO_PQUOTE_TEMPLATES.

If using the XML Publisher printing option, the seeded default template is derived from the profile option *ASO: Default Contract Template*.
- **Show Header Attachments**

Enabled if *ASO: Print Quote Show Attachments* is *Yes*. If enabled, it should be unchecked by default.

If checked, all header level Text type attachments in the Miscellaneous document category will print.

- Show Line Attachments

Enabled if *ASO: Print Quote Show Attachments* is *Yes*. If enabled, it should be unchecked by default.

If checked, all line level Text type attachments in the Miscellaneous document category will print.

- Show Header Sales Supplement

Displayed if *ASO: Enable Sales Supplement* is set to *Yes*.

- Show Line Sales Supplement

Displayed if *ASO: Enable Sales Supplement* is set to *Yes*.

34.3 Overview of Publishing Quotes

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

- The user has update access to the quote.
- The highest version of the quote must be used.
- The quote is not in *Order Submitted* or *Inactive* status.
- The quote is not expired.
- *ASO: Enable Web Publishing* is set to *Yes*.
- If the quote-to customer is of type **Organization**, a quote-to contact has been specified.
- There is at least one specialty store in which the quote can be web published.
- The quote must not already be web published.
- The quote must not be submitted for batch pricing.
- The pricing and tax statuses must both be **Complete**.
- The quote name must be specified.

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

If the quote-to customer is of type **Person**, the sales representative publishes the quote directly to the quote-to customer. If the quote-to customer is of type **Organization**, the sales representative publishes the quote to the quote-to contact. A quote version can only be published to an FND_USER. Oracle Quoting will verify that the quote-to customer/contact is an FND_USER. If the customer is not an FND_USER, the sales representative can create an FND_USER for the customer.

34.4 Web Publishing a Quote

To web publish a quote:

Prerequisites

- *ASO: Enable Web Publishing* must be set to *Yes* at the appropriate level.
- You must have update access to the quote.
- The highest version of the quote must be used.
- The quote is not in *Order Submitted* or *Inactive* status.
- The quote is not expired.
- If the quote-to customer is of type **Organization**, a quote-to contact has been specified.
- There is at least one specialty store to which the quote can be web published.
- The quote must not already be web published.
- The quote must not be submitted for batch pricing.
- The Pricing and Tax statuses must be **Complete**.
- The quote name must be specified.

Navigation

Quoting > Quote Header > Actions > Web Publish

Notes

- If the customer is not an FND_USER, you will be prompted to enter a User Name. The system auto generates a password and creates an FND_USER for the customer. This information is then emailed to the customer.
- The Specialty Store ID is stored in the quote header.

34.4.1 Unpublishing a Quote

To unpublish a previously published quote:

Prerequisites

- *ASO: Enable Web Publishing* must be set to *Yes* at the appropriate level.
- The quote must currently be web published.
- The highest version of the quote must be used.
- The user must have update access to the quote.
- The quote is not in *Order Submitted* or *Inactive* status.
- The quote is not expired.
- The quote is not submitted for batch pricing.

Navigation

Quoting > Quote Header > Actions > Web Unpublish

Placing Orders

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

- [Section 35.1, "Overview of Placing Orders"](#)
- [Section 35.2, "Placing an Order"](#)

35.1 Overview of Placing Orders

When you place an order in Oracle Quoting, the quote is converted into an order using Oracle Order Management.

35.2 Placing an Order

To convert a quote into an order:

Prerequisites

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

- The quote is not expired.
- The Pricing and Tax statuses must be **Complete**.

Navigation

Quoting > Quote Header > Place Order

Steps

1. Select **Place Order**.

Your order is submitted to Oracle Order Management and you receive a confirmation number. You can then track the order in Order Management.

The order confirmation displays:

- Order Number
- Order Total
- Shipping Method
- Currency
- Ship-To Customer
- Ship-To Account
- Ship-To Contact
- Ship-To Address

Glossary

Advanced Pricing

A member of the Oracle Order Management and Logistics application module. It is integrated within Oracle Quoting, as a setup mechanism and pricing engine that executes pricing and promotional calculations for Order Management.

AK region

Area where a user with Application Developer Common Module can customize specific areas of responsibility and modify LOVs, drop down menus, buttons, and regions in the HTML UI.

API

An Application Programming Interface (API) is a published interface to accomplish a business or scientific function. An API defines a contract to its users by guaranteeing a published interface, but hides its implementation details.

Approval Canceled

A seeded quote status in Oracle Quoting, indicating that the sales representative has canceled the approval process.

Approval Pending

A seeded quote status in Oracle Quoting, indicating that the quote is pending approval, and is read-only.

Approval Rejected

A seeded quote status in Oracle Quoting, indicating that the approval has been rejected by the approvers.

Approved

A seeded quote status in Oracle Quoting, indicating that the quote has been approved by the necessary approvers.

AR

Oracle Accounts Receivable, which is a component of the Oracle Financials application module.

ATP

Availability to Promise. The quantity of current on-hand stock, outstanding receipts and planned production that has not been committed through a reservation or placing demand. In Oracle Inventory, you define the types of supply and demand that should be included in your ATP calculation.

attachments

Attachments such as documents or URLs for a single line item on a quote.

availability

The percentage or amount of scheduled time that a computing system provides application service.

batch pricing

The entire quote is priced including any manual/automatic adjustments, pricing qualifiers, pricing attributes and promotions via a concurrent manager in the Advanced Pricing module. The quote is considered fully priced after such a pricing call.

Bill To customer

The name and financial account of the customer who is invoiced for the goods or service ordered.

BOM item type

An item classification that determines the items you can use as components in a Bill of Material. BOM item types include standard, model, option class, and planning items.

button

An object on the UI that accesses a form when the user places the cursor on top of it and clicks on it.

child

Referring to an itemized level that is below a referenced level.

clause

The business and legal content that describes the rights and obligations of a business when transacting with other businesses.

concatenation

Information from two fields merged together in the output.

Configurator

A member for the Oracle Order Management and Logistics application module. It is integrated within Oracle Quoting, and allows customers to pick related products to products they have already selected and configure model products.

contact

A contact is an individual that represents an organization.

container model

Model where associated components are dynamically selected based on user action and Configurator rules.

contract

A legally binding business document that specifies agreement between business entities with contract terms for present or future transactions between them with obligations and entitlements identified for each party of that contract to serve within the legal framework.

contract approval

Approval process whereby the contract terms within the sales contract are reviewed and approved by the legal experts before release to the customer. The sales management team themselves may approve actual changes that are made.

credit check

Ability to gauge customer credit worthiness during the quoting process. Oracle Order Management's credit check is integrated with Quoting.

cross-sell

A cross-sell item is an item that you can sell as an addition to an item in your quote.

date field

A field in which the user may only enter or select a date.

descriptive flexfield

A field that your organization can extend to capture extra information not otherwise tracked by Oracle Applications. A descriptive flexfield appears in your window as a single character, unnamed field. Your organization can customize this field to capture additional information unique to your business.

discount

Reduces the price by a fixed amount or percentage, or provides a new price.

Draft

A seeded quote status in Oracle Quoting, indicating the initial status of the quote.

executable

A quote is considered to be in an executable state if there is a valid transition from the current quote status to *Order Submitted* status.

financial account

Information for a customer that provides their Quote To, Bill To, Ship To and Sold To information. Also provides an account number for the customer.

Forms UI

User interface developed with a Forms based platform.

fuzzy search

Widens the scope of a search and finds data comparable to the search criteria. The fuzzy search method uses Word Replacement Rules to map a word, abbreviation, or special character that might be entered by a user as a search criteria to a similar word.

header level

Level of information for a quote that contains information not related to individual products, licenses, services, or prices.

HTML UI

User interface developed on an HTML platform.

Inactive

A seeded quote status in Oracle Quoting indicating that no further activity is allowed on the quote.

installed base

A customer's installed base lists the products and services installed at the customer site.

instance

A single representation of an item.

Intermedia

A text search utility that allows keyword searches for greater flexibility when conducting searches.

item attribute

A feature associated with a particular item type, also known as an item attribute. An item type attribute is defined as a variable whose value can be looked up and set by the application that maintains the item. An item type attribute and its value is available to all activities in a process.

line level

All information associated with a line. It can include price list, adjustment, sales credit, and tax detail information.

lost

A quote status indicating that the customer did not accept the quote.

LOV

A list of valid values in a text field, from which the user must choose.

LOV text field

A field where the user may either choose a value from an LOV, or type in the name of the value. The typed value must be a value existing in the LOV.

mandatory field

Field that must be filled out by the user in order to move to the next field or form.

multiple instantiation

The ability to configure a child model of a top level multiple times in the same configuration. The child model is only listed in the BOM once but can be spawned as many times as needed in the configuration.

non-quota sales credit

See [non-revenue sales credit](#).

non-revenue sales credit

Sales credit you assign to your salespeople not associated with your invoice lines. This is sales credit given in excess of your revenue sales credit.

numeric field

A field where the user may only enter numeric values.

optional field

Field that is not required by the user to filled in order to move to the next field or form.

opportunity

An opportunity is created in Oracle Field Sales or Oracle Telesales, whereby a sales representative initiates the sales process with initial customer contact, or lead, and ends when the sales representative creates a sale or loses the sale. The stored information is stored as an opportunity. Opportunities can be converted into quotes in Oracle Quoting.

Order Submitted

A seeded quote status in Oracle Quoting indicating that the quote has been submitted as an order to Oracle Order Management.

order type

An order transaction type can be for any of the following order categories: **ORDER**, **RETURN** or **MIXED**. Line transaction types can be for any of the categories: **ORDER** or **RETURN**. When an order is created with a particular transaction type, the order category code determines which lines are permitted for that order. If the category code is **ORDER**, then the order can have only regular Lines. If the category code is **RETURN**, then the order can have only return lines. If the category code is **MIXED**, then the order can have both kinds of lines.

partial configuration

The ability to modify part of an existing configuration without launching the entire configuration in Configurator.

price list

Price lists contain prices and currencies associated with products and services.

product number

Unique instance identifier in Installed Base.

profile option

Features in the Oracle Quoting application that one can set to affect the appearance, performance and functionality of the application according to each user. Can also be set at site, application and responsibility levels.

quota sales credits

See [revenue sales credit](#), [non-revenue sales credit](#).

quote

A quote is an offer to a customer that contains priced items and shows a total price for the offer. You create a quote when you accumulate items and any associated services and save it.

Quote To customer

The person or organization for whom the quote is being created for.

quote number

Oracle Quoting automatically assigns a quote number to the quote if the profile option **ASO: Automatic Numbering** is set to **Yes**. The quote number is composed of the quote number itself and a version number that increments each time a new quote version is created.

quote status

The quote status indicates the stage of preparation that a quote is in. There are seeded quote statuses: **Approval Canceled**, **Approval Pending**, **Approval Rejected**, **Approved**, **Draft**, **Inactive**, **Order Submitted**, and **Store Draft**.

quote version

The quote version, which is part of the quote number, indicates the latest version of the quote. The version increments when the status of the quote is changed or if the quote is copied into a revision.

read-only field

Changes cannot be made to the information, if any, in a read-only field, it can only be viewed.

reconfigure

The ability to make changes to a configured model that has already been purchased by the Quote To customer.

related items

An acceptable substitute you define for an item so you may receive the item if your supplier cannot ship the original item on the purchase order.

re-order

The customer is purchasing a model with the same configuration from a previous order.

resources

Anything of value, except material and cash, required to manufacture, cost, and schedule products. Resources include people, tools, machines, labor purchased from a supplier, and physical space.

returnable

An item attribute indicating that an item can be used for a trade-in.

revenue sales credit

Sales credit you assign to your salespeople that is based on your invoice lines. The total percentage of all revenue sales credit must be equal to 100% of your invoice lines amount. Also known as quota sales credits. See non-revenue sales credit, sales credit.

role

One or more users grouped by a common responsibility or position.

role types

A collection of roles associated with a particular CRM module.

search string

Parameters entered into the criteria field when a user conducts a search.

section

A part of the form that is delineated from the other parts of the form by borders and/or a category name for the section.

seeded

Data already included and/or already a part of the standard Oracle Quoting application.

serviceable, serviceable item

An item attribute indicating that a service can be associated with the item.

service reference

A form that links a service to its associated serviceable item.

shippable

An item attribute indicating that the item can be shipped.

Ship To customer

The name and financial account information of the customer to whom the goods or services are delivered.

shopping cart

A collection of items that a customer selects for purchase in an Oracle iStore 11i Web store. In the context of the quote creator, the shopping cart is referred to as a quote.

Sold To customer

The name and financial account of the customer. The sold-to customer is financially responsible for the order.

Store Draft

A seeded quote status in Oracle Quoting that indicates the quote is for Oracle iStore internal use only. Allows Oracle iStore to have a Draft to Order flow that is separate from Oracle Quoting.

substitute

A substitute item is an item you can substitute for one that is not currently available.

surcharge

Increases the price by a fixed amount or percentage or provides a new price.

system administrator

Individuals who have the ability to set profile options and define users.

taxpayer identification number

Also known as fiscal code or NIF.

taxpayer registration number

Also known as Value Added Tax (VAT) number.

tax exempt

A customer, business purpose, or item to which tax charges do not apply.

TeleSales

An application which is part of the Oracle Sales application module. It integrates with Oracle Quoting to complete the Opportunity to Quote to Order sales cycle.

trade-in, trade-in item

A trade-in is performed when a customer wants to return an item for credit against an order.

UI

User Interface.

UOM

Unit of measure.

up-sell

An up-sell item is a more expensive model that you can substitute for an item in your quote.

web publish

Publishing a quote to a customer via the web, where the quote can be viewed by the customer via web instead of a hard copy or fax.

wildcard

A special character within a search parameter that tells the application to search for all records that are similar to the search parameter. In Oracle Quoting, % is the wildcard character. For example, if you enter **order%** as a quote name search parameter, the application returns all quotes with names that begin with **order**.

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