

Oracle® Quoting

User Guide

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Oracle Quoting User Guide, Release 12

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- Did you understand the context of the procedures?
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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Quoting User Guide*.

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

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

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

- The Oracle Applications graphical user interface.

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

See Related Information Sources on page xvii for more Oracle Applications product information.

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Structure

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Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Related Guides

Oracle Quoting shares business and setup information with other Oracle Applications products. Therefore, you may want to refer 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.

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 an Oracle Applications form 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.

Introduction to Oracle Quoting

This chapter covers the following topics:

- Overview
- Oracle Quoting Key Features
- Oracle Quoting Integrations
- Accessing Oracle Quoting HTML Interface
- Accessing the Oracle Quoting Forms User Interface

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 place orders from quotes.

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

Oracle Quoting Key Features

The following are some of the key features in Oracle Quoting. Some of them are applicable to HTML UI or Forms UI alone and are listed separately.

- Enforce key business practices in the sales cycle with enhanced quote status and transition model
- Create quote templates that are solution-based models
- Specify End Customer Information
- Support flexible pricing within a quote including manual price overrides
- Support Automatic and On-demand pricing and tax computation modes
- Comply with Latin American Tax Requirements
- Support for multi-currency price lists
- Perform customer credit checks
- Create quote from an opportunity
- Convert quotes to orders
- Add configured products to a quote (including guided selling)
- Support for Header and Line Level Shipping/Billing for components of a configuration
- Add service products to a quote
- Support for Buy One, Get One Free (promotional goods)
- Check availability of products
- Search Customer Install Base for Trade-Ins
- Search for products using Oracle interMedia
- Support Line-Level Payments and Charges
- Allow contract terms and conditions to be added, negotiated, displayed and printed on the quote through enhanced integration with Oracle Sales Contracts
- Initiate approvals, using the Oracle Approvals engine, with out-of-the-box notifications
- Automatic territory assignment
- Automatic sales credit allocation

- View estimated commission
- Perform terms substitutions
- Print quotes in PDF and RTF formats with enhanced printing
- Support for XML Publisher RTF Templates and Output
- Support for printing sales supplements
- Share quotes with customers to public and restricted web storefronts
- Create and update quotes for different operating units
- Automatically populate quote fields based on business rules

HTML UI Only

- Customize user interface
- Ability to apply one or more quote templates at the time of quote creation
- Ability to simultaneously update multiple quote lines
- Ability to update quote detail from search results
- Support the TCA SmartMatch functionality to avoid the creation of duplicate customers and contacts
- Access sales assistance comments from customers

Forms UI Only

- Folder technology for customizing columns

Oracle Quoting Integrations

Oracle Quoting integrates with the following modules:

- Oracle Receivables, page 1-4
- Oracle Advanced Pricing, page 1-4
- Oracle Bills of Materials, page 1-5
- Oracle General Ledger, page 1-5
- Oracle Inventory, page 1-5
- Oracle Order Management, page 1-5

- Oracle Applications Framework, page 1-5
- Oracle Sales, page 1-5
- Oracle TeleSales, page 1-5
- Oracle Approvals Management, page 1-5
- Oracle Advanced Planning, page 1-5
- Oracle Configurator, page 1-6
- Oracle Incentive Compensation, page 1-6
- Oracle Territory Manager, page 1-6
- Oracle Sales Contracts, page 1-6
- Oracle iStore, page 1-6
- Oracle Install Base, page 1-6
- Oracle Payments, page 1-6
- Oracle Proposals, page 1-6
- Oracle XML Publisher, page 1-7
- Oracle Workflow, page 1-7

Oracle Receivables

Oracle Quoting uses Oracle Receivables to store customer information. Customer information is stored in the Trading Community Architecture (TCA) schema. Oracle Receivables also allows you to set up payment terms for your customers.

Using Oracle Receivables, you can also set up valid tax locations. Failure to set up state and tax account combinations can result in errors.

Refer the *Oracle Receivables User Guide* for complete information.

Oracle Advanced Pricing

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

Oracle Bills of Materials

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

Oracle General Ledger

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

Oracle Inventory

Provides all product information. Refer to the *Oracle Inventory User's Guide* for complete information.

Oracle Order Management

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

Oracle Applications Framework

Provides the framework and user interface for Oracle Quoting HTML UI. Enables personalization of the Oracle Quoting user interface. Refer to the *Oracle Applications Framework Personalization Guide*.

Oracle Sales

Oracle Quoting integrates with Oracle Sales to complete the sales flow in the HTML interface. Refer the *Oracle Sales User Guide* for more details.

Oracle TeleSales

Oracle Quoting integrates with Oracle TeleSales to complete the sales flow in the Forms interface. Refer the *Oracle TeleSales User Guide* for more details.

Oracle Approvals Management

Allows set up of approval hierarchies, rules and notifications. Refer to *Oracle Approvals Management Implementation Guide* for complete information.

Oracle Advanced Planning

Oracle Quoting uses Advanced Planning and Scheduling for Global Availability to Promise 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.

Oracle Configurator

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

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.

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.

Oracle Sales Contracts

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

Oracle iStore

Allows sales representatives to publish quotes to a storefront, and customers to request assistance with shopping carts from sales representatives using Quoting. Refer the *Oracle iStore Implementation Guide* for setup details.

Oracle Install Base

Provides a list of all customers' products and installation details. Refer to the *Oracle Install Base Implementation Guide* for complete setup information.

Oracle Payments

You can set up the risk factor threshold from Oracle Payments. Refer to the *Oracle Payments Implementation Guide* for complete setup information.

Oracle Proposals

Allows sales representatives to create customized proposals to distribute to customers. Refer to the *Oracle Proposals Implementation Guide* for setup information.

Oracle XML Publisher

Allows quote printouts to be produced using XDO (XML/XSL) technology. This is mandatory in order to print quotes.

Oracle Workflow

Provides notifications related to Approvals integration. Refer to the latest version of the *Oracle Workflow Administrator's Guide* for more information.

Accessing Oracle Quoting HTML Interface

The Quotes page is the gateway to viewing quote details and modifying existing quotes. The Quotes page opens with the results from the default saved view. For example, all 'My Approved Quotes' are displayed. From this page, you can search for quotes, create a new quote, export quote details to an excel sheet, modify select details for a quote, and add notes and tasks.

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

- Quote
- Customer
- Expiration Date
- Status
- Amount

You can designate a different Saved View as the default listing for your Quotes page. For more information see Saved Views, page 4-4.

You must be logged in as a valid Quoting user. This will be assumed for all the HTML procedures in this guide that are covered in chapters 2 through 18.

Log in to the Oracle HTML Quoting interface using the seeded Quoting User responsibility. The application can also be launched from the shortcuts on the Sales Dashboard when you log in with the Sales User responsibility.

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.

You must be logged in as a valid Forms Quoting user. This will be assumed for all the Forms procedures in this guide that are covered in chapters 19 through 36.

Log in to Oracle Forms with the Quoting Sales Agent or Quoting Sales Manager responsibility. Choose Quoting in the Navigator.

If you are a TeleSales agent, you can create quotes and access the Quotes forms from the Quote subtab of the eBusiness Center.

Creating Quotes

This chapter covers the following topics:

- Overview of Creating Quotes
- Creating a Quote
- Creating a Quote from an Opportunity
- Creating a Quote from a Customer or Contact
- Creating a New Version of a Quote

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
- Customer
- Expiration Date
- Currency
- Order Type
- Operating Unit
- Status

A record for the new quote is created when you enter this information and select **Apply**. If you had not specified a name for the quote, the name is generated as Quote for <Customer Name>.

With the exception of customer, customer account, and operating unit, other attributes

can be changed or added after quote creation. However, if the customer did not have a customer account prior to quote creation, it can be specified after quote creation. Subsequently, the customer account cannot be changed.

The searchable list of customers comes from Oracle Receivables. You can create new customers if the Create Customer button is enabled using OA Personalization in Quoting HTML UI.

For more information on OA Personalization, refer the *Oracle Applications Framework Personalization Guide*.

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.

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

Pre-Defined Quote Statuses

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

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

Quote Status	Description	Read-only
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 and remove attachments. You cannot 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 new quote.

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.

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.

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*.

Quote Defaulting

You may notice that when you select the option to create a quote, the page opens with some of the fields having values in them. This is possible because of defaulting rules.

The quote header defaulting rules are applied for each field that does not have a value and has a defaulting rule set up for it. The quote line defaulting rules are applied when a quote line is created. If a trigger attribute is subsequently changed, then the dependant attributes are cleared and defaulted again. For example, if the pricing agreement (trigger attribute) is changed, then the payment terms and price list (dependant attributes) values are cleared and the defaulting rules are applied again to derive fresh values. For more information on setting up defaulting rules, refer the *Oracle Quoting Implementation Guide*.

Prerequisites

- The profile option *ASO: New Quote Security* must be set to *No* at the appropriate level to create new, standalone quotes. If set to *Yes*, you cannot create new quotes but you can create quotes from opportunities. See *Enabling Quoting Security*, page 14-1, for more information.

Field Behavior

- **Templates**

Select one or more quote templates that you wish to apply to the quote.

- **Quote Number**

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

- **Customer**

Tip: If you know the customer's account number, you can enter it in the Account Number field and press the TAB key. The Customer is populated from the values associated with the account number.

If you select a customer with an address, the address field is automatically populated. See *Address Defaulting*, page 8-2 for more information.

The account number field is automatically populated based on the customer that you selected from the search results. If the customer has no accounts, one will be created based on the setting of the *ASO: Auto Account Creation* profile. See *Creation of Accounts*, page 7-4 for more information.

Important: The customers displayed in the search results are based on the value that the *ASN: Customer Access Privilege* profile is set to. Refer the *Oracle Quoting Implementation Guide* for more details.

- **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 system parameter *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 system parameter *Default Sales Group*. See the *Oracle Quoting Implementation Guide* for more information.

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

- Source Name

Source Name refers to various marketing sources, such as campaign, that are set up in Oracle Marketing. If the quote is created from an opportunity, the source name defaults from Oracle 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

- Contract Template

A default contract template is defaulted from the system parameter *Default Contract Template*.

- Flexfields

Flexfields can be enabled/disabled using OA Personalization.

See also:

- Creating a Quote from an Opportunity, page 2-8
- Creating a Quote from a Customer or Contact, page 2-9
- Overview of Creating Quotes, page 2-1

Creating a Quote from an Opportunity

If your discussions with the customer have reached an advanced stage, you can create a quote from the opportunity. Many of the values from the opportunity are passed on to the quote. If defaulting rules are set up, some fields in the quote header and lines may obtain values based on the rules. If a trigger attribute is subsequently changed, then the dependant attributes are cleared and defaulted again. For example, if the pricing agreement (trigger attribute) is changed, then the payment terms and price list (dependant attributes) values are cleared and the defaulting rules are applied again to derive fresh values.

Prerequisites

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

Navigate to Oracle Sales > Opportunity > Opportunities

Field Behavior

- Contract Template

A default contract template is defaulted from the system parameter *Default Contract Template*.

- Flexfields

Flexfields can be enabled/disabled using OA Personalization.

- Templates

You can select one or more quote templates to apply to the quote.

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

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 *Creation of Accounts*, page 7-4 or the *Oracle Quoting Implementation Guide* for more information.

- Opportunity Name
- Service Items

If the profile option *ASO: Require Service Reference on Add to Quote* is set to *Yes*, the service items from the opportunity are not copied to the quote. If set to *No*, the service items are copied and the start date is defaulted to the current date. The duration and period fields default from the values set up in Oracle Inventory for the service item. These can be changed after the quote is created.

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

Creating a Quote from a Customer or Contact

You can create a quote from the Update Customer or Update Contact pages. If you create a quote from a Customer, the quote is defaulted with the customer details. Similarly, if you create the quote from the Contact, the quote is defaulted with the customer and contact details.

For other details on creating a quote, see *Creating a Quote*, page 2-5.

Creating a New Version of a Quote

View all versions of a quote by clicking the Version number link of the Quote Number field in the Quote Header. When you create a new version, the version number increments by one.

Prerequisites

- The user must have update access to the quote.
- The highest version of the quote must not be 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 Contract acceptance details will not be copied to the new version. Additionally, you can review contract terms of previous quote versions with user and system variables resolved for specific versions of the quote.

Refer the Copying Quotes, page 10-1 chapter for details on the information that is passed to the new version of the quote.

Creating and Modifying Quote Templates

This chapter covers the following topics:

- Overview of Templates
- Creating a Template
- Modifying a Template
- Applying a Template to an Existing Quote

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 also add service products to templates.

See also:

- Creating a Template, page 3-1
- Modifying a Template, page 3-2
- Applying a Template to an Existing Quote, page 3-2

Creating a Template

Log in to Self Service Applications with the Quoting Sales Manager responsibility and select the Template Administrator menu.

Notes

- While creating a template, you must select the operating unit for it. Only users having access to the operating unit can use the template. The operating unit cannot be changed once the template is created.

- You can add model items to the template and configure them.

Modifying a Template

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.

Applying a 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.

Field Behavior

- Select **Add Product** from the lines section of the quote.
- **Source** From the LOV, select Quote Template.

Search and select the template to add products from it to the quote.

Note: You can also select templates to add to a quote while creating it. See Creating a Quote, page 2-5 for more details.

Searching

This chapter covers the following topics:

- Overview of Searching for Quotes
- Saved Views
- Search and Select: An Overview
- Searching for Customers
- Searching for Contacts
- Searching Addresses
- Using interMedia Search

Overview of Searching for Quotes

You can search either for quotes or other components within a quote. When you search for a quote, you can use the Simple and Advanced Searches as well as the Saved Views. In the Quotes page, you can search for quotes using different criteria.

A Simple search allows you to search using the following criteria:

- Quote Name
- Customer Name
- Contact Name
- Salesperson
- Status
- Days to Expiration

The following fields must be enabled using OA Personalization if you want to include them in your search.

- Quote Number
- Account Number
- Primary Salesperson
- Expiration Date From
- Expiration Date To

An Advanced Search allows you to search using:

- Days to Expiration
- Status
- Salesperson
- Order Type
- Account Number
- Agreement
- Contact Name
- Creation Date From
- Creation Date To
- Currency
- Customer Name
- Customer Type
- Days to Expiration
- Expiration Date From
- Expiration Date To
- Operating Unit
- Opportunity Name
- Opportunity Number
- Order Type

- Price List
- Primary Sales Group
- Primary Salesperson
- Quote Name
- Quote Number
- Sales Channel
- Sales Group
- Source Name
- Status
- Update Date From
- Update Date To
- Web Published
- Quote amount range
- Currency
- Update date range
- Assistance Requested
- Assistance Reason
 - Some of the fields that you want to use in your search may not be visible. Enable them using OA Personalization.
 - **Days to Expiration** If a value is specified in this field, the search results include all quotes in the range starting today + the value specified in the Days to Expiration field. The operator is ignored for this field. For all Date search parameters, the operators are ignored.

The search process returns the highest quote versions that match the specified criteria and are accessible to you.

- Search results display quotes from all the operating units that you have access to. For more information on operating units, see *Quote Access Security*, page 14-2.
- You must specify at least one of a set of search parameters for a search to be conducted. This is mandatory for all types of searches - simple and advanced.

See also:

- *Saved Views*, page 4-4
- *Search and Select: An Overview*, page 4-5
- *Searching for Customers*, page 4-6
- *Searching for Contacts*, page 4-8
- *Searching Addresses*, page 4-9
- *Using interMedia Search*, page 4-9

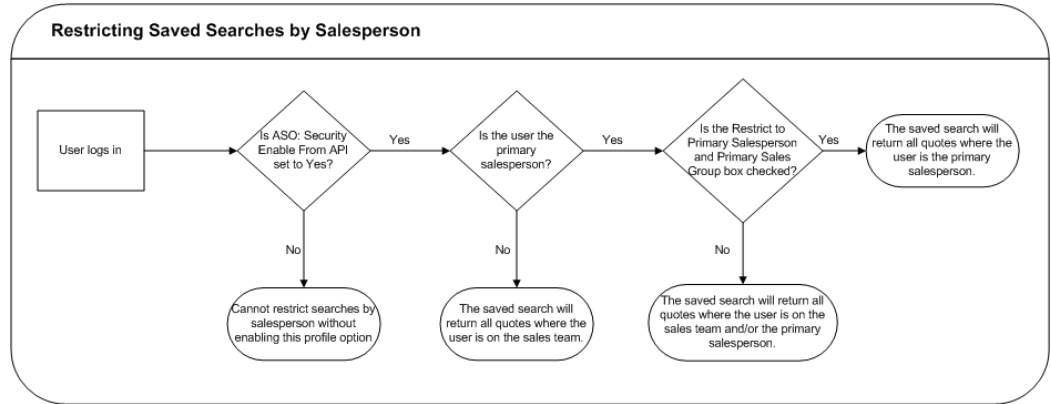
Saved Views

Saved Views allow you to save query criteria, select and organize the displayed columns, define sort criteria, and define one saved view as the default for the Quote page. You can delete or duplicate saved views. My Open Quotes is the seeded default saved view for the Quotes page.

Note: You cannot delete or modify seeded saved views except change the *Set As Default* flag.

If you want to restrict saved views so that only those quotes where the user is on the sales team and/or is the primary salesperson are displayed, 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 view process if trying to restrict the saved view by salesperson.



There are four seeded saved views:

- 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 user who has currently logged in.

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

Search and Select: An Overview

While searching for components within a quote such as a product, contact, or contract template, you use the Search and Select pages. Within the Search and Select pages, you can enter a keyword for a "begins with" match.

Tip: To view all results, leave the search area empty and click **Go**.

Some of the components that you can search for in the HTML UI are:

- Address
- Contact
- Contract Template
- Customer

- Extended Attributes
- Product
- Promotion Code
- Salesperson
- Source Name

There are several other components that you can search for from the various tabs in the quote.

Note: Some of the fields that you want to use in your search may not be visible. Enable them using OA Personalization.

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

Customer and contact searches are based on the Data Quality Management (DQM) Search functionality. Refer the *Oracle Quoting Implementation Guide* for details on enabling DQM.

Important: Non-DQM searches are not supported.

Searching for Customers

While creating a quote, you can search for customers (Organization or Person) using the Simple Search or Advanced Search. For more information on Business-to-Business (B2B) and Business-to-Customer (B2C) searches, refer the *Oracle Sales User Guide*.

Important: Non-DQM searches are not supported.

Searching for an Organization using Simple Search

To search for an organization using simple search, use the following criteria:

- Name
- DUNS Number
- Account Number
- Registry ID

- Web Site
- Taxpayer ID

All entered criteria are used in the search (an AND query).

Searching for an Organization using Advanced Search

To search for an organization using advanced search criteria, use the following as part of your search criteria:

- Name
- DUNS Number
- Account Number
- Classification
- Registry ID
- Web Site
- Taxpayer ID
- Relationship Role
- Address
- City
- Country
- Phone Number
- Postal Code
- Province
- State

Searching for a Person using Simple Search

To search for a Person using simple search, use the following as part of your search criteria:

- Name
- Phone Number
- Registry ID

- Account
- Job Title
- E-mail Address
- Taxpayer ID

Searching for a Person using Advanced Search

To search for a Person using advanced search, use the following as part of your search criteria:

- Name
- Phone Number
- Registry ID
- Account
- Classification
- Job Title
- E-mail Address
- Taxpayer ID
- Relationship Role
- Address
- City
- Country
- Postal Code
- Province
- State

Searching for Contacts

To search for a contact, use the following criteria:

- Name

- Job Title
- Email Address
- Phone Number

All entered criteria are used together during the search (an AND query)

Note: In Oracle Quoting, you can search for contacts only after specifying the customer.

Refer the *Oracle Sales User Guide* for more information on working with Contacts.

Searching Addresses

You can search addresses for customer contacts and persons. In Oracle Quoting, there are Ship To, Bill to and End Customer Addresses. You can search and select addresses from the Shipping and Billing tab in a quote. For more information on searching customer and contact addresses, see the *Oracle Sales User Guide*.

Using *interMedia* Search

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:

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

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

Note: Only *interMedia*-based searches are supported in Quoting HTML.

Credit Checks

This chapter covers the following topics:

- Overview of Credit Checking
- Performing a Credit Check

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 (OM) 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 the profile *ASO: Credit Check Rule* is set at the appropriate level. The external credit check is performed if it is configured by an application developer.

Performing a Credit Check

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

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.

Navigate to Quoting > Actions > Initiate Credit Check

Pricing Products and Quotes

This chapter covers the following topics:

- Overview of Pricing
- Applying Pricing Adjustments
- Applying Promotion Codes
- Applying a Header Level Discount
- Applying a Line Level Discount
- Applying Pricing Agreements
- Applying Pricing Attributes
- Freezing Prices for a Quote
- Specifying Automatic/Manual Pricing Requests for a Quote
- Reset Pricing on a Quote
- Submitting a Manual Pricing Request
- Viewing Details of the Pricing Request
- Canceling a Pricing Request
- Viewing and Entering Quote Tax Details

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.)

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) or for each individual product (line level). The product price list supersedes the quote header 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.

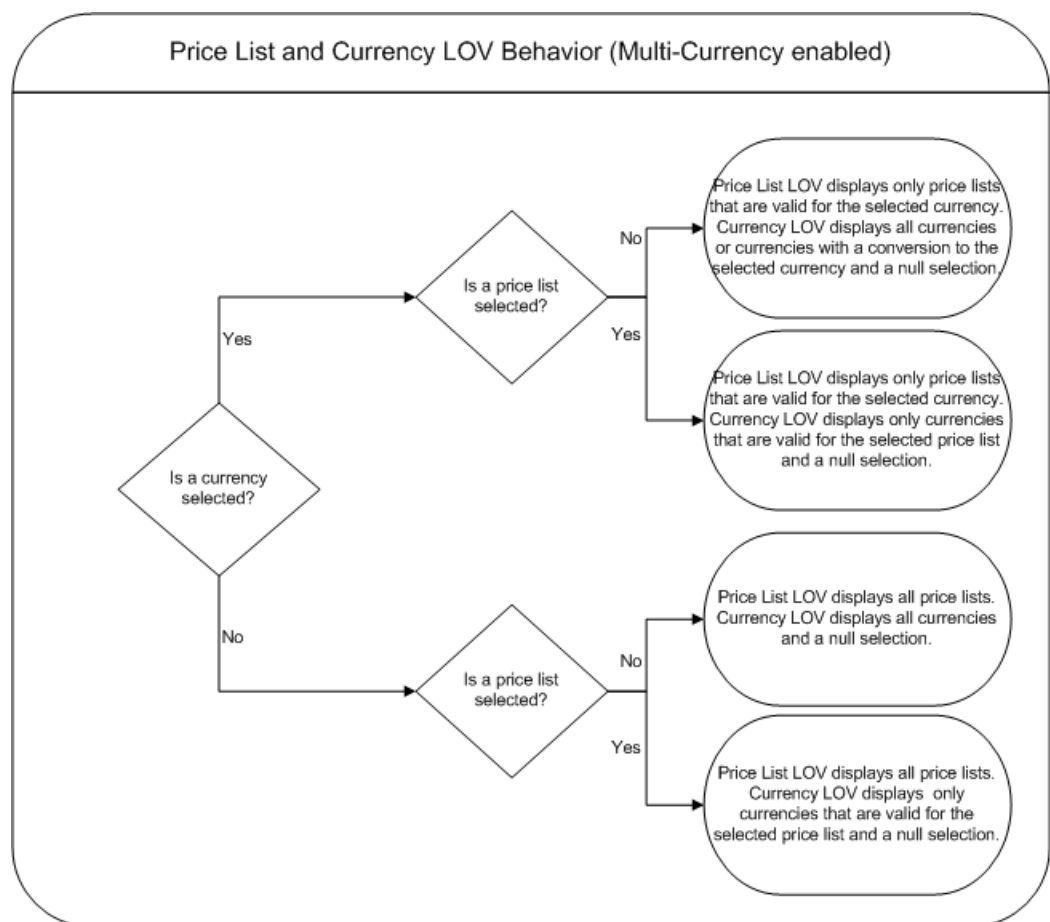
The *QP: Multi-Currency Usages* profile should be set to *Yes* at the application or

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.

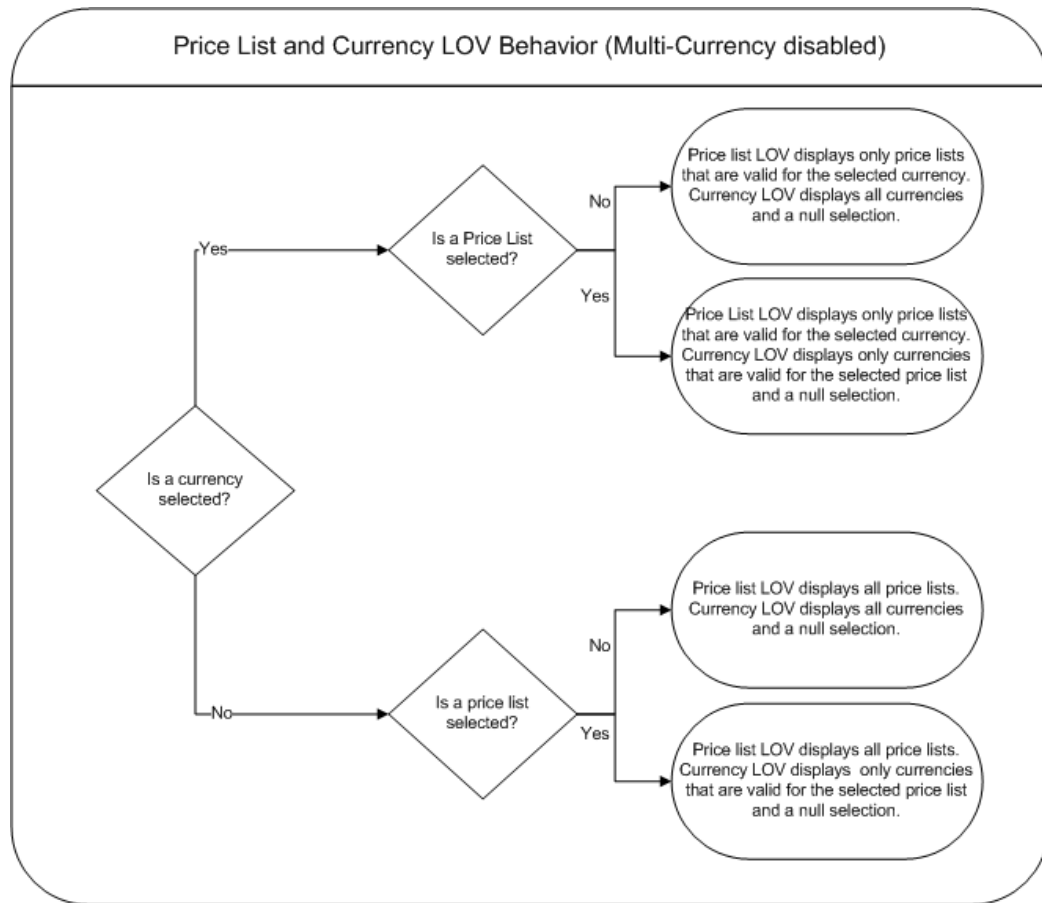
With multi-currency price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

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



Additionally, if the Price List field is disabled using OA Personalization 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 the Price List field is disabled 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 the Price List field is disabled using OA Personalization, the Price List and Currency LOVs are displayed as read only in the HTML user interface.

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

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 Pricing subtab in the Charges section.

You can also view the charges for each product line in the quote. Line level charges are displayed in the Charges section of the Pricing subtab in the Line Details page.

You can see all charges applied to the quote at the header and line levels using the View All Charges button from the Charges region of the Pricing tab at the header level. The View All Charges button is not enabled by default. Use OA Personalization to display the button.

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.

Note: The Price List, Agreement and Currency LOVs are based on the Pricing Date in the quote.

Promotional Goods

A Promotional Good is a free or discounted product that is automatically added to the quote when a qualifying product (or products) is 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.

Important: 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 it 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.

Notes

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.
- You can select automatic and non-automatic promotion codes.

Field Behavior

- Promotion Code Adjustment

This is an optional field. If no adjustment is selected, all the promotion's applicable promotion code adjustments are applied to the quote - header or line level.

If a specific adjustment is selected and it is automatic, it is added to the price adjustments table. If the selected adjustment is manual, it is available for selection in the Price Adjustments LOV.

You can see all price adjustments applied to the quote at the header and line levels using the **View All Adjustments** button from the Price Adjustments region of the Pricing tab at the header level. The View All Adjustments button is not enabled by default. Use OA Personalization to display the button.

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 and Line levels)
- 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 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 the modifier with the highest precedence which Oracle Quoting applies to the quote.

Caution: The values in the Payment Terms, Freight Terms, and Shipping Method fields, populated based on defaulting rules, may be overridden after the pricing call.

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

Quote Pricing Behavior

To improve performance, the number of pricing calls made have been optimized. See the notes below to understand the complete pricing behavior.

Notes

- Changes to the quote are preserved while navigating throughout the quote without explicitly saving the entire quote.
- Updating the quote by adding a new line, making changes to a line, changing price affecting attributes, and so on will result in the respective quote line being fully priced. However, the quote itself is not fully priced and this is reflected in the Price and Tax status indicators.
- The entire quote is saved and priced when any of the following actions are executed:

Quote Header Actions

- Place Order

- Web Publish Quote
- Print Quote
- Duplicate Quote
- Create New Version
- Update Sales Credits
- View Commission
- Freeze Price
- Initiate Credit Check

Sub-tab Actions

- Initiate Approval
- Create Proposal
- Reassign (Sales) Team
- Update (Contract) Terms

Clicking any of the following hyperlinks

- Customer Name (Quote To, Bill To, Ship To, End Customer)
 - Account Number/Details (Quote To, Bill To, Ship To, End Customer)
 - Contact Name (Quote To, Bill To, Ship To, End Customer)
 - Address (Quote To, Bill To, Ship To, End Customer)
 - Version Number
 - Opportunity (Link, Detail)
 - Proposal Name
-
- If the profile *ASO: Pricing Change Alert* is set to *Yes*, a message is displayed notifying you that a price affecting change has been made to the quote. If the profile is set to *No*, the notification message is not displayed.
 - If a price affecting change is made to the quote, the Pricing and Tax status flags display Incomplete. In case Automatic Pricing is set, the quote is re-priced when the quote is saved or the Price Quote action is initiated. If the quote is set for Manual Pricing, the quote is re-priced only when the Price Quote action is selected.

Important: In spite of the quote being set to Automatic Pricing, the entire quote is re-priced only when the quote is saved or the Price Quote action is initiated.

Applying Pricing Adjustments

In Oracle Advanced Pricing, modifiers are set up that result in price adjustments to a quote. Types of benefits include: discount in percent, amount or new price, discounts on other items, surcharges.

In Oracle Quoting, you can select an adjustment to apply to the quote at the header level or line level.

Prerequisites

- The Override Flag in Oracle Pricing must be enabled for the adjustment modifier.
- The profile *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.

For header level pricing adjustments, navigate to Quoting > Pricing subtab > Price Adjustments region > Add Adjustment

For line level promotion codes, navigate to Quoting > Line Details > Pricing subtab > Price Adjustments region > Add Adjustment

Applying 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.

For header level promotion codes, navigate to Quoting > Pricing subtab > Promotion Codes region > Add Promotion Code

For line level promotion codes, navigate to Quoting > Line Details > Pricing subtab > Promotion Codes region > Add Promotion Code

Applying a Header Level Discount

Prerequisites

- The profile *ASO: Discounting Privilege* must be set to *Full* at the appropriate level.
- Set up at least one header level, overrideable modifier in Oracle Pricing.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.

You can specify a header level discount percent from the Quote totals region in the Products tab.

Field Behavior

- Header Manual Discount

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

Applying a Line Level Discount

Prerequisites

- The profile *ASO: Discounting Privilege* must be set to *Full* at the appropriate level.
- Set up at least one line level, overrideable modifier in Oracle Pricing.
- The quote must not be in a read-only status.
- The highest version of the quote must be used.

Field Behavior

- Discount Percent

The Discount Percent column on the Lines page displays the total of all discounts 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.

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

- Discount Amount

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

- Selling Price, Discount Percent, Discount Amount. If these fields are enabled and you enter conflicting values in the fields, the line is priced based on:
 - Selling Price
 - Discount Percent
 - Discount Amount

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 or all agreements in all currencies if no customer is specified. Pricing agreements that are not specific to a customer are always displayed.

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.

Applying Pricing Attributes

Pricing Attributes are created in Oracle Advanced Pricing. They are used to control pricing activity. For example, Pricing uses attributes to define the eligibility of a customer order to receive a particular price or modifier. Pricing attributes may also be

used as elements of a pricing formula.

In a quote, you can apply pricing attributes to derive the price for a product. You can select the pricing context and specify values for the attribute.

To apply pricing attributes for a product in a quote, click the Add Attribute button in the Pricing Attributes region from the Line Details page.

Note: In HTML Quoting, you can apply pricing attributes after the product or service has been added to the quote.

However, pricing attributes cannot be specified in the following scenarios:

- Adding quote lines in the configurator session
- Adding related products
- Applying quote templates
- Creating a Quote from an Opportunity

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.

- Pricing Date is not limited to the current date, but can be any date in the past or future.
- The Price List, Agreement and Currency LOVs are based on the Pricing Date.

Pricing Date ensures that the prices on a quote do not change if product prices are updated in Oracle 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.

Specifying Automatic/Manual Pricing Requests for a Quote

The price of a quote is affected when a change is made that affects pricing. A quote change that affects the price will also affect tax calculations. 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
- Tasks changes
- Initiate/Cancel Approvals
- Changes to Pricing and Tax flags
- Sales Team changes
- Contract Terms changes
- Web Publish or Unpublish
- Initiate Credit Check
- Sales Supplement changes
- System driven quote status changes
- Place Order

Note: Changes made to a quote from the quote search results detail will not compute the price or tax on the quote as the changes are deemed to not affect the quote price.

There are two fields in the quote that you can select to enable automatic or manual

pricing and tax for individual quotes. Two profile options govern the initial values of these fields.

If the profile option *ASO: Calculate Price* is set to *Manual*, the *Manual* option is selected in the Price Calculation LOV by default. However, if you wish to automatically price this quote alone, you can select *Automatic* from the LOV. The profile setting is not overridden and remains *Manual* for other quotes.

If the profile option *ASO: Calculate Tax* is set to *Manual*, the *Manual* option is selected in the Tax Calculation LOV by default. You can select the *Automatic* option to enable automatic tax calculation provided you have selected the *Automatic* option in the Price Calculation LOV as well.

Important: Setting the *ASO: Calculate Price* profile to *Manual* and the *ASO: Calculate Tax* profile to *Automatic* is not supported because quote tax is based on the quote product pricing. Similarly, in the UI, you cannot select *Automatic* for the Tax Calculation field when the Price Calculation field is set to *Manual*.

Pricing and Tax Indicators

Action	Automatic Pricing/Tax	Manual Pricing/Tax
Price affecting change	• The affected lines are fully priced. • The Pricing and Tax status flags display Incomplete. • The entire quote is repriced and taxed when the quote is saved or the Price Quote action is initiated.	• The affected lines are not repriced. • The Pricing and Tax status flags display Incomplete • The entire quote is repriced and taxed when you initiate the Price Quote action.

In the Price Quote page, there are Submission Options that you can choose from to either price the quote right away or submit it for a batch request. The Submission Options field can be enabled in the HTML UI via OA Personalization.

You can still manually price a quote by selecting **Price Quote**, even if the Price Calculation and Tax Calculation fields 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 an individual quote is particularly helpful when you are:

- 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 applying multiple quote templates to a quote

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

If the pricing or tax statuses are incomplete, you cannot:

Header Level

- Place an order
- Web publish a quote
- Print a quote

Subtab actions

- Submit a quote for approval
- Create a proposal

Reset Pricing on a Quote

You can remove any price overrides and non-automatic adjustments applied to a quote via the Reset Pricing button. This button is available on the Quote Header and at the Line Level Pricing Adjustments region.

When you initiate reset pricing, any price overrides and non-automatic adjustments are removed.

In the *Automatic* pricing mode, when pricing is reset from the Quote Header, a full blown pricing call is made resetting the prices on the entire quote. If the pricing is reset from a quote line, the quote line alone is repriced.

In the *Manual* pricing mode, when the **Reset Pricing** button is clicked, the following takes place:

At the Header Level

- The pricing and tax status flags display Incomplete
- The entire quote is re-priced only when the Price Quote action is initiated. Subsequently, the pricing and tax status flags display Complete.

- Any price overrides and non-automatic adjustments applied to the quote are removed.

At the Line Level

- The pricing and tax status flags display Incomplete
- The quote line alone is re-priced only when the Price Quote action is initiated. Subsequently, the pricing and tax status flags display Complete.
- Any price overrides and non-automatic adjustments applied to the quote line are removed.

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.
- The profile *ASO: Discounting Privilege* profile must be set to either *Full* or *Partial*.

Submitting a Manual Pricing Request

Irrespective of the profile and field settings, you can still manually price a quote by selecting the Price Quote action. Manual pricing and tax calculations allow you to capture the most recent price/tax information.

Prerequisites

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

To manually price a quote, select Price Quote from the Actions LOV.

Notes

- If the Price Calculation and Tax Calculation fields are set to *Automatic* and you select the Price Quote action, the Price Quote page will not be shown but the quote will be priced. For any other combination of these field values, the Price Quote page is displayed.

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

- You have two Submission Options for pricing the quote: *Now* or *Submit pricing request and notify me when it is complete*. The display of the latter submission option is based on the lookup type ASO_UI_DISPLAY.
 - If you chose *Submit pricing request and notify me when it is complete*, a message 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 Quote Header 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.
- The Pricing Request field can be enabled/disabled via OA Personalization. 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 tab.

Note: The Submission Options section can be disabled in the HTML UI via OA Personalization.

Viewing Details of the Pricing Request

You can view the pricing request details if 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

Prerequisites

- The *Submission Options* field is enabled.
- The user must have Update access.
- The quote must not be in the read-only status.
- The quote has been submitted for batch pricing.

Note: After the batch pricing request completes, the user will receive an e-mail notification.

Canceling a Pricing Request

Prerequisites

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

Field Behavior

- Cancel Pricing Request

The Pricing Request status changes to Canceled. A message displays indicating that the pricing request was canceled. You also receive an e-mail notification confirming the cancellation.

Viewing and Entering Quote Tax Details

You can choose the tax handling and view other tax details for a quote. The Quote tax details are displayed in the Pricing tab of the Quote Header and Quote Line.

There are four tax options:

- Exempt — The current quote is exempt for a normally taxable customer site.
- Required — 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 valid only 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 Required tax option applies.

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

Field Behavior

- **Exemption Reason**
The menu displays tax exemption reasons.
- **Exemption Number**
The exemption number associated with the particular exemption.
- **Tax Regime Code**
The tax regime code associated with the tax rate code is displayed.
- **Tax**
The tax associated with the tax rate code is displayed.
- **Tax Status Code**
The tax status code associated with the tax rate code is displayed.

Refer the *Oracle E-Business Tax User Guide* and the *Oracle E-Business Tax Implementation Guide* for more details on setting up tax in the application.

Customers and Relationships

This chapter covers the following topics:

- Overview of Customers and Relationships
- Creating Customers
- Creating Contacts
- Creating Addresses

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.

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 an order is created from the quote.

The following table shows the mapping of the HTML UI terminology to the Oracle Order Management (OM) terminology.

Location in UI	Quoting Terminology	OM Terminology
Quote Header	Quote-to Customer, Account Number, Quote-to Contact, Quote-to Address Note: The quote-to address is not passed into OM.	Customer, Customer Number, Contact, Address
Shipping and Billing tab (Addresses > Shipping)	Customer Name, Account Number, Contact, Address	Ship To Customer, Ship To Customer Number, Ship To Contact, Ship To Address
Shipping and Billing tab (Addresses > Billing)	Customer Name, Account Number, Contact, Address	Bill To Customer, Bill To Customer Number, Bill To Contact, Bill To Address
Shipping and Billing tab (Addresses > End Customer)	Customer Name, Account Number, Contact, Address	End Customer, End Customer Number, End Customer Contact, End Customer Address

Customer information can be grouped into the following areas:

Quote-To Information

- Quote-To Customer, Account Number — 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 an order is created from the quote.

Bill-To Information

- **Bill-to Customer, Account Number** — 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, Account Number** — 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 field is optional.
- **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.

End Customer Information

- **End Customer, Customer Number** — The name of the customer who will be the ultimate recipient of the products. In most situations, the Quote-to customer is also the end customer. However, there are exceptions to this. For example, you may create a quote for a reseller organization, ABC Corporation. ABC Corporation, in turn, sells to XYZ Corporation. In this case, ABC Corporation is the Bill To Customer and XYZ Corporation is the End Customer as well as the Ship to Customer.
- **End Customer Contact** — A person representing the end customer, only when the end customer is of party type organization. This field is optional.
- **End Customer Address** — A physical location where the products are sent. This address can be associated with either the end customer or end customer contact.

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 *ASO: Auto Account Creation* profile. It 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 becomes an order.
- Create accounts only when Place Order—Accounts are created only when an order is created from the quote.

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

Quoting Behavior Based on Profile Options

Profile Option Setting	Create Sold-To	Select Sold-To	Create Ship-To/Bill-To/End Customer	Select Ship-To/Bill-To/End Customer	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

Profile Option Setting	Create Sold-To	Select Sold-To	Create Ship-To/Bi ll-To/End Customer	Select Ship-To/Bi ll-To/End Customer	Web Publishing	Order Conversio n
<i>ASO: Auto Account Creation set to 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 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 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
- An order is created from the quote

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 placed as an order.

Creating Customers

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

If the customer details that you enter are similar to a record already existing, the system prevents you from creating a duplicate customer.

Prerequisites

- The **Create Customer** button must be enabled using OA Personalization.

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.

Creating Contacts

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

If the contact details that you enter are similar to a record already existing, the system prevents you from creating a duplicate contact.

Prerequisites

- The **Create Contact** button must be enabled via OA Personalization.

Creating Addresses

Addresses for customers are typically created in Oracle 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.

Prerequisites

- The **Create Address** button must be enabled via OA Personalization.

Note: The Quote To customer must have at least one active address (any usage) to create a quote.

Entering Address and Payment Information

This chapter covers the following topics:

- Overview of Address and Payment Information
- Address Defaulting
- Entering Shipping and Billing Information
- Copying Quote-to Information
- Entering Payment Information
- Entering Line-Level Shipping or Billing

Overview of Address and Payment Information

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

Note: The Quote To customer must have at least one active address (any purpose) to create a quote.

- 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 an order is created from the quote.

- 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.

- **End Customer Address** — Address where the order is sent. This is applicable in multi-tiered selling models such as indirect sales through partner channels.

This is the address of the customer who may be the final recipient of the order in a multi-tiered selling model. For example, you may create a quote for a reseller organization, ABC Corporation. ABC Corporation, in turn, sells to XYZ Corporation. In this case, ABC Corporation is the bill-to customer and XYZ Corporation is the end customer as well as the ship-to customer.

You can also designate billing, shipping, and end customer 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. For a component of a configured product, line level shipping, billing, and end customer addresses can be specified as long as the parent model is not a model that must be shipped together with all its components.

Enable Billing Addresses at the line level using OA Personalization.

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:

1. Primary Sold-To address type usage for the Quote-To Contact
2. Identifying address for the Quote-To Contact
3. Primary Sold-To address type usage for the Quote-To Customer
4. 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:

1. Primary Sold-To address type usage for the Quote-To Customer
2. 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:

1. Primary Sold-To address type usage for the Quote-To Customer
2. 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:

1. Primary Bill-To address type usage for the Bill-To Contact
2. Identifying address for the Bill-To Contact
3. Primary Bill-To address type usage for the Bill-To Customer
4. 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:

1. Primary Bill-To address type usage for the Bill-To Customer
2. 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:

1. Primary Bill-To address type usage for the Bill-To Customer
2. 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:

1. Primary Ship-To address type usage for the Ship-To Contact
2. Identifying address for the Ship-To Contact
3. Primary Ship-To address type usage for the Ship-To Customer
4. 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:

1. Primary Ship-To address type usage for the Ship-To Customer
2. 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:

1. Primary Ship-To address type usage for the Ship-To Customer
2. Identifying address for the Ship-To Customer

Entering Shipping and Billing Information

Field Behavior

- Shipping, Billing, and End Customer fields

The shipping and billing customer fields are automatically populated with the Quote-To Customer name and account, if any. You must select the End Customer details as they are not defaulted. However, this is optional.

To create a new ship-to, bill-to or end customer, select Create Customer in the Search and Select: Customer page. This button does not appear on the page if it is disabled using OA Personalization. See Creating Customers, page 7-5 for more information.

- Shipping, Billing, and End Customer Contact

To create a new ship-to, bill-to or end customer 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 Creating Contacts, page 7-6 for more information.

- Shipping, Billing, and End Customer Address

The shipping and billing address have default values based on the information in Overview of Address and Payment Information, page 8-1. Select the End Customer

address as this is not defaulted.

To create a new ship-to, bill-to, or end customer 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 Creating Addresses, page 7-6 for more information.

- Requested Date Type
Indicates whether the Requested Date is the Requested Arrival Date or the Requested Ship Date.
- Requested Date
The date the customer requests the products to be shipped from the warehouse or received at the Ship To location. This can be either the Arrival or Ship date.
- Shipping Method
This LOV lists the valid shipping methods for the item validation organization for the operating unit associated with the quote.
- Shipment Priority
Indicates the urgency with which the order should be shipped. This LOV lists the values in the OM lookup SHIPMENT_PRIORITY.
- Demand Class
Demand Classes allow you to segregate demand into user-defined groups. The LOV for Demand Class is based on the OM Demand Class lookup. Demand Classes are used to check product availability (ATP).
- 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.
- Shipping Instructions
Enter shipping instructions, if any.
- 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.
- Packing Instructions
Enter packing instructions, if any.

Notes

- The following header level information is passed to Oracle Order Management upon submission:
 - Shipment Priority
 - FOB
 - Freight Terms
 - Requested Date Type
 - Demand Class
 - Requested Date
 - Shipping Method
 - Shipping Instructions
 - Packing Instructions

Copying Quote-to Information

You can copy the Quote-to information to Shipping, Billing, and End Customer separately or to all.

Prerequisites

- You should have Update access to the quote.
- The quote is not in the read-only status.
- The quote is the highest version.
- The quote has not been submitted for batch processing.

Notes

- You can copy Quote-to information from the Quote header - Shipping and Billing tab.

Entering Payment Information

Oracle Quoting allows you to specify payment terms at both the header and line levels of a quote. Depending on the payment type you choose, you can enter the details of a check or a credit card. Another payment type includes payment by cash.

Oracle Quoting supports the following payment scenarios:

- Pay for an entire order using a credit card.
- Use different payment methods for select lines.
- Use a credit card to pay for all lines with the exception of one line.
- Oracle Quoting does not show payment terms flagged for pre-payment.
- By default, the payment type field is NULL. If left blank in the Quote header, this could be interpreted as Invoice.
If this field is NULL in the quote line, the value in the header is inherited for the line as well.
- You can specify a PO Number at the line level. If left blank, the header's PO Number is referenced.
- If the payment type is Credit Card, the Bill-To Customer must be specified at both the header and line levels.

Oracle Quoting supports the use of Payment Terms Substitution. Please see Terms Substitution, page 6-6 for more information.

Field Behavior

- Payment Terms

Payment Terms in the Quote header 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 Payment is implemented, the application performs a credit card check at order placement. For more information, consult the *Oracle Payment Implementation Guide*.

Entering Line-Level Shipping or Billing

Field Behavior

- Requested Date

The date the customer requests the products to be shipped from the warehouse or received at the Ship To location. This can be either the Arrival or Ship date.

- Warehouse

Indicates the preferred shipping warehouse for the product. You can enable/disable this field using OA Personalization.

- 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, the 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.

- Shipment Priority

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

- Demand Class

Demand Classes allow you to segregate demand into user-defined groups. The LOV for Demand Class is based on the OM Demand Class lookup. Demand Classes are used to check product availability (ATP).

- 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.

- Shipping Instructions

Enter Shipping instructions, if any.

- 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.

- Packing Instructions

Enter packing instructions, if any.

Notes

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

- Shipment Priority
- FOB
- Freight Terms
- Requested Date Type
- Demand Class
- Requested Date
- Shipping Method
- Shipping Instructions
- Packing Instructions

Modifying Quotes

This chapter covers the following topics:

- Adding Products to the Quote
- Removing Products from the Quote
- Adding Services to Quotes
- Adding a Service to the Quote for a Product in the Customer's Installed Base
- Adding a Service for a Product on a Pending Order
- Modifying a Service
- Configuring Products
- Viewing Attributes of a Model
- Deleting a Component
- Duplicating an Existing Configuration in a Quote
- Duplicating a Line
- Adding a Related Product
- Checking Product Availability
- Adding Trade-Ins to Quotes
- Adding a Trade-in to the Current Quote
- Adding a Trade-in From the Customer Install Base
- Viewing Product Relationships in Install Base
- Splitting Lines
- Splitting a Configured Line
- Defaulting Rules in Quote Lines
- Viewing Quote Versions
- Linking a Quote to an Opportunity

- Entering Sales Supplement Information
- Changing the Base UOM for a Line
- Changing the Order Type for a Quote
- Using Descriptive Flexfields
- Updating Multiple Products in a Quote

Adding Products to the Quote

You can search for products to add to quotes. For information on how the product search is filtered, refer *Using interMedia Search*, page 4-9.

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

To add products to the quote, click **Add Product** from the Products subtab.

Field Behavior

- Search In

You can search for a product in Product Catalog, Quote Templates, or in Install Base.

- Search

- Action

Based on your choice in the Search In field, specify why you are searching for a particular product: to order, to reconfigure, to trade it in, and so on. If you chose to search for a product in a quote template, this field is not displayed.

- Template

This field is displayed if you chose to search for a product in a Quote Template. Specify the template name or description.

- Basic Information: Product

Next, specify what kind of a product you are searching for - All Categories, Application, Database, or Tools. Search by Part Number, Description, or Long Description using *interMedia* Search.

This field is not displayed when you search for a product in a quote template.

Line Numbers

Line numbering in Quoting is based on product type. The format of the line numbers is A.B.C.

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.

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

Line Number	Product Type
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
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 an order is created from the quote.

Removing Products from the Quote

Notes

- To remove a product from the quote, select it and choose the Remove Line option from the Actions LOV.
- To remove multiple products from a quote at the same time, use the Update Multiple Products option.

Adding Services to Quotes

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

- Warranties — These are services that are 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

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

If the ASO: *Require Service Reference on Add to Quote* profile is set to *Yes*, you cannot search for services from the product catalog. You can only add services to a product on a current quote, in the customer's Install Base, or on a Pending Order.

If the profile is set to *No*, services that the customer can order appear in a product catalog search. You can add these services to a quote and specify references for them later.

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

Once a service is added to a quote, you can view service details from the Service tab in the Line Details page.

Prerequisite

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

To add a service to a serviceable product in the current quote, select Add Services from the LOV in the Products tab.

Related Topics

- Adding a Service to the Quote for a Product in the Customer's Installed Base, page 9-6
- Adding a Service for a Product on a Pending Order, page 9-6

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

Prerequisites

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

To add a service for a product in the Installed Base, click **Add Service to Previous Purchase** from the Products subtab.

Field Behavior

- Source
Select Installed Base from the Source drop-down.
- Category LOV
Shows 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.
Select a category and search for a serviceable product.
- Add Services
Click to add a service to add to the selected product.

Adding a Service for a Product on a Pending Order

Prerequisites

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

To add a service for a product on a pending order, click **Add Service to Previous Purchase** from the Products subtab.

Field Behavior

- Source
Select Pending Orders from the Source drop-down.
- Search
Enter details of the order to search and select the order to add services to.
- Add Services
Click to add a service to add to the pending order.

Modifying a Service

Prerequisites

- The service to modify must be selected.

To modify services after they are added to the quote, select Modify Service from the Actions LOV in the Products subtab.

Configuring Products

Quoting accesses Oracle Configurator to configure model products. For information on using Configurator, refer 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.

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.

To configure a Model product, select Configure from the Actions LOV.

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.

- 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.

Notes

- A configuration is incomplete if the top level model product added to the quote using Configurator is missing mandatory components. A configuration is also marked incomplete if a model product is added to the quote without invoking Configurator. An incomplete configuration becomes complete after missing components are added to the model configuration.
- A configuration could also be invalid. If there are upper and lower limits for the quantity of a model component, and the user changes the component quantity outside the allowable range, the configuration is complete but invalid.
- In Quoting, you can save invalid or incomplete configurations. However, to place an order from the quote, the configuration must be complete and valid.

Viewing Attributes of a Model

The attributes of a model and its components are displayed as part of the Product Information details in the quote line. You can ascertain the following attributes of a model:

- **Ship Model Complete**
If set to Yes, it indicates that the entire configuration must be delivered in the same shipment. If set to No, components can ship separately.
- **Parent Model**
Indicates whether the parent model for a model component is an Assemble-to-Order (ATO) model or a Pick-to-Order (PTO) model.
- **Top Level Model**
Indicates whether the top model for a model component is an Assemble-to-Order (ATO) model or a Pick-to-Order (PTO) model.

The attributes are blank if the quote line is not part of a model configuration.

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. The deletion may result in an invalid configuration. You can save the quote but cannot place an order unless the configuration is valid and

complete.

Note: If you delete a component with an associated service, the service is also deleted.

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 the quote must be used.
- The quote must not be submitted for batch processing.
- The component to delete must be selected.

To delete a line in the quote, select the line and choose the Remove Line action from the LOV in the quote's Products subtab.

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 model
- 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.

To duplicate a configuration, select the first line in the configuration and choose the Duplicate Line action from the LOV in the quote's Products subtab.

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 into the new line(s).

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.

To duplicate a line in the quote, select the line and choose the Duplicate Line action from the LOV in the quote's Products subtab.

Adding a Related Product

Prerequisites

- Product relationships must be set up in Oracle Inventory.

To add a related product to the quote, select Add Related Products from the LOV in the Products subtab.

Checking Product Availability

You can check the availability of all products in a quote or the individual product lines in a quote. Availability is displayed for the following types of products in a quote:

- Standard items
- Assemble to Order (ATO) and Pick to Order (PTO) model items
- Kit items

For model items, Quoting displays the availability information based on the availability of the model as well as its components. The components include mandatory as well as included items.

In addition, the availability information for an entire quote displays attributes such as estimated ship date, estimated group ship date (for models), estimated arrival date, shipping warehouse, shipping method, and so on.

Note: Availability information is not displayed for product items of type Service, Trade In, Container model, and components of a container model.

To check the availability of an individual product line in a quote, select Check Availability from the list of action items for a line.

To check the product availability for an entire quote, click **Check Availability for All Products**.

Information that is displayed as part of the availability check is explained below. Some of these fields are updateable and applicable only if you are checking availability for an individual product line.

Field Behavior

- Copy To Shipping Details

Copies the values for the Requested Date, Warehouse, Shipping Method and Demand Class to the corresponding fields in the Shipping Details page.

- Refresh

You can change the Requested Date, Warehouse, Shipping Method, or Demand Class and click this button to get the availability results based on the change.

- Requested Date Type

The date the customer requests the products to be shipped from the warehouse or received at the Ship To location. The requested date is interpreted as the Requested Ship Date if the Requested Date Type attribute for the Quote To customer is Ship.

The requested date is interpreted as the Requested Arrival Date if the Requested Date Type attribute for the Quote To Customer is Arrival.

- Requested Date

The requested ship date or requested arrival date. The date the customer requests the products to be shipped from the warehouse or received at the Ship To location.

The following sequence is used to determine the value that should be passed to the ATP engine to determine availability:

1. Quote line level requested date
2. Requested date for the implicit ship set containing the quote line (applies to model components)
3. Requested date for the top model containing the quote line (applies to model components)
4. Requested date in the quote's header
5. Current System Date

- Warehouse

The warehouse from where the products will be shipped.

The value in this field is determined based on the following sequence:

1. The ship from warehouse value in the quote line
2. Ship from warehouse for the implicit ship set containing the quote line (applies to a model component)
3. Ship from warehouse for the top model containing the quote line (applies to model components)
4. NULL, if the *ASO: Use Sourcing Rule* profile is set to **Yes**
5. Value specified by the *ASO: Default Ship from Org* profile

- Shipping Method

The shipping method, for example, FedEx. The shipping method is determined based on the following sequence:

1. Quote line level shipping method
2. Shipping method for the implicit ship set containing the quote line (applies to model component)

3. Shipping method for the top model containing the quote line (applies to model component)
4. Quote header level shipping method
5. Null

If no shipping method is determined based on the above, the field is left blank.

- Demand Class

Demand Classes allow you to segregate demand into user-defined groups. The LOV for Demand Class is based on the OM Demand Class lookup. Demand Classes are used to check product availability (ATP).

- Requested Quantity

The requested quantity for the product

- On Hand Quantity

The current quantity of the product existing in inventory for the ship from warehouse.

- Estimated Group Ship Date

The estimated ship date for all the lines that belong to the same ship set grouping on a quote line.

- Estimated Ship Date

The estimated ship date for a quote line.

- Estimated Arrival Date

The estimated arrival date for a quote line to the destination. This date is arrived at based on the Shipping Method selected.

- Requested Date Quantity

The quantity available on the requested ship/arrival date for this quote.

- Estimated Quantity Available

The quantity available on the estimated ship date for a quote line.

Adding Trade-Ins to Quotes

If your 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.

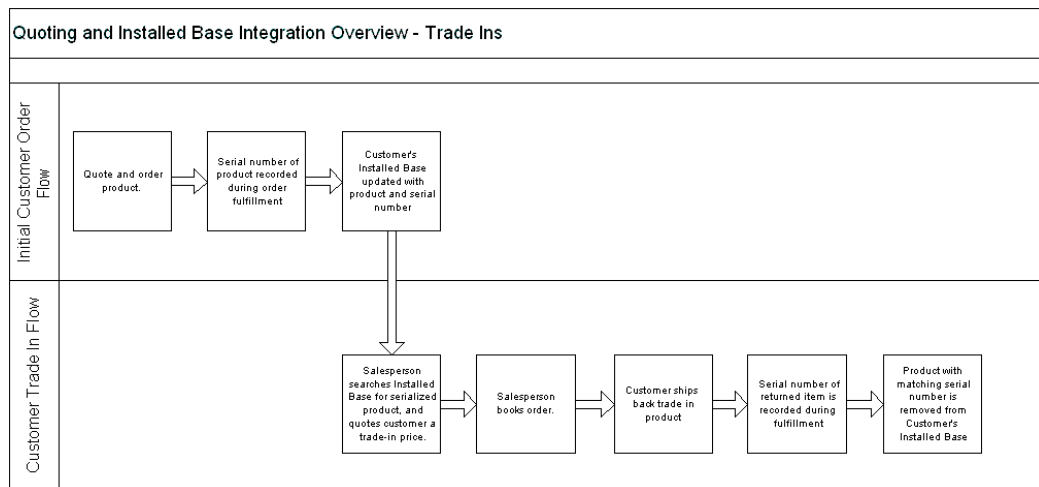
When the application calculates the order total, it recognizes products with the line category code **Return** as trade-ins. The application treats trade-in prices as credits and subtracts them from the order total. Tax is calculated for trade-ins, for the current date.

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.

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 then creates an order from the quote. 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.

Adding a Trade-in to the Current Quote

Prerequisites

- Enable the Line Category Code LOV using OA Personalization.
- The product that you want to trade-in must be returnable.
- The order category for the order type must be **Mixed**.
- The product total of the quote (excluding the trade-in) must exceed the value of the trade-in(s).

Tip: You can search for trade-in products from the Product Catalog if the order category for the order type is Mixed.

To add a trade-in to a quote, select Add Product from the LOV in the Products subtab.

Field Behavior

- Source
Select Product Catalog
- Search for Product to
Select Trade-In
- Product
Select the category of the product to trade-in and search for the product.

Adding a Trade-in From the Customer Install Base

Prerequisites

- The order category for the order type must be Mixed.
- The product total of the quote (excluding the trade-in) must exceed the value of the trade-in(s).

To add a trade-in from the customer Install Base to a quote, select Add Product from the LOV in the Products subtab.

Field Behavior

- Source
Select Installed Base
- Category LOV

Select the category of the product to trade-in and search for the product. The LOV shows 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.

- Total Price

After the product is added to the quote, the total price appears in brackets, indicating that the value is negative.

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

Viewing Product Relationships in Install Base

Some products are not stand-alone but have child components within them. Sometimes, the child components may have further child components. You can view the relationship between products in Oracle Install Base when you search for a product in the Install Base.

To view the product relationship, click the icon in the View Relationships column from the product search results.

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, you may want to order 5 laptops, and ship 3 of them to one location and 2 to another. All line attributes (price list, line level billing, line level shipping, line level payment details, line level attachments, and so on) are copied to the new lines.

Prerequisites

- The quantity on 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.

To split a line, select the line and choose the Split Line action from the LOV in the Products subtab.

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 into the new line(s).

Also see:

Splitting a Configured Line, page 9-17

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 payment details, line level attachments, and so on.) are copied as well.

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.

To split a configured line, select the line and choose the Split Line action from the LOV in the Products subtab.

Defaulting Rules in Quote Lines

When you add a quote line, defaulting rules are applied for each field that does not have a value and has a defaulting rule set up for it. When you update a quote line and change a trigger attribute, then its dependant attribute(s) are cleared and defaulted again. For more information on setting up defaulting rules, refer the *Oracle Quoting Implementation Guide*.

Defaulting rules are applied to quote lines when you perform the following actions on a quote:

- Add a product, related product, service item, promotional good to a quote
- Add a service to a previous purchase
- Add a model item from Install Base
- Configure a model

Viewing Quote Versions

To view the previous versions of the current quote, click the Version number link of the Quote Number field in the Quote Header.

Field Behavior

- Versions

Selecting the linked version number in the quote header displays an overview of all versions of the quote.

Linking a Quote to an Opportunity

You can link a quote to an existing opportunity.

Field Behavior

- Opportunity Name

Search for the opportunity by Name or Number.

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 the line level or at the header level.

The Question component of the sales supplement template allows the following response types:

- Currency
- Date
- Number
- Predefined

- Text
- Textbox
- File Attachment

Prerequisites

- The header and line level Sales Supplement subtab must be enabled using OA Personalization.
- Sales Supplement templates must be set up in Oracle Quoting - Forms.

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*.

- File Attachment

There are no restrictions on the type of attachments that you can upload to the supplement. However, attachments will not be printed when the quote is printed.

- Update

Click to modify the sections in the template.

- Remove

Click to change the sales supplement template for the quote.

Changing the Base UOM for a Line

Note: You cannot edit the UOM for a component of a model item.

Field Behavior

- UOM

The UOM LOV 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.

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

Field Behavior

- Order Type

The value defaulted into this field is from the system parameter *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.

Using Descriptive 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 identically in Oracle Quoting and Order Management.
- If you want to view and edit header-level flexfields in the Create Quote and Create Quote from Opportunity pages, enable the flexfields via OA Personalization. They are not enabled by default.

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.
- Line-level flexfields are displayed in the Product Information tab.

Updating Multiple Products in a Quote

You may need to update multiple products in a quote at the same time for many reasons. For example, if a quote has a hundred lines, and fifty of the lines need to be shipped to a different address from the header shipping address, it would be more efficient to enter the shipping address once for all fifty lines, instead of entering them individually.

Using the Update Multiple Products option, you can perform the following actions on multiple products simultaneously:

- Entering the Discount Percent
- Removing Lines
- Entering Shipping and Billing

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.

To update multiple products in a quote, select the **Update Multiple Products** button from the Lines region of the Update Quote Details page.

Notes

- If you are updating some fields in the product lines, only information in those fields is replaced. Fields that have not been updated remain unchanged.
- Defaulting rules are not applicable when you update multiple products in a quote.

Field Behavior

- Discount Percent for multiple products
 - The *ASO: Discounting Privilege* profile must be set to *Full*.
 - The behavior of this field is based on the *ASO: Require Minus Sign for Discount* profile option. See the *Oracle Quoting Implementation Guide* for more information.
 - For promotional goods, the *ASO: Enable Promotional Goods Override* profile must be set to *No*.
- Shipping and Billing details for multiple products:

- You cannot select sub-components of a model that cannot be shipped separately.
- If the shipping method chosen conflicts with the existing warehouse, the Warehouse detail is removed from the field.
- If you select a new Customer, any saved contact and address details are removed.
- Remove Line for multiple products:
 - You cannot remove sub-components of a standard model if the *ASO: Allow Quantity Updates for Component Item* profile is set to *No*.
 - You cannot remove the sub-component of a container model if the *ASO: Allow Quantity Updates for Component Item* profile is set to *No* or it is a changed component of a re-configuration from Oracle Install Base.

Copying Quotes

This chapter covers the following topics:

- Overview of Copying a Quote
- Copying a Quote

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.

Copying a Quote

You can copy a quote to make a new quote or make a new version of an existing quote. When a quote is copied, some information is carried over to the new quote. Table Copy Quote Behavior, page 10-1 details the information that is moved to the new quote or new version.

Copy Quote Behavior

	Copy to New Quote	Copy to New Version (HTML UI only)
Quote	Yes	Yes

	Copy to New Quote	Copy to New Version (HTML UI only)
Quote Number	No	Yes
Version Number	No	No
Opportunity	No	Yes
Contract Template	Yes	Yes
Contract Clauses and User Variables	Yes	Yes
Contract Acceptance details	No	No
Contract Attachments (Supporting Document and Contract category documents)	Yes	Yes
Contracts Deviation Abstract	Yes	Yes
Expiration Date	No	Yes
Status	No	No
Published Flag	No	No
Sales Channel	Yes	Yes
Campaign	Yes	Yes
Primary Salesperson	Yes	Yes
Primary Sales Group	Yes	Yes

	Copy to New Quote	Copy to New Version (HTML UI only)
Order Number	No	No
Customer (party and account)	Yes	Yes
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 and Line Level	Yes	Yes
Payment and Tax Information at Header and Line Level	Yes	Yes
Regular Products, Configured Products, Services and their reference source, Quantity, and UOM	Yes	Yes
Manual Price Adjustments	Yes	Yes

	Copy to New Quote	Copy to New Version (HTML UI only)
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	No	Yes
Notes	No	Yes
Tasks	No	Yes
Descriptive Flexfields at the Header and Line Level	Yes	Yes

	Copy to New Quote	Copy to New Version (HTML UI only)
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>)	Yes, irrespective of the settings in the profile
Approval History	No	Yes
Sales Supplement	No	Yes
Pricing Updated On	No	No
Pricing Status	See Table- Behavior of Quote Pricing Flags when a Quote is Copied, page 10-5	See Table- Behavior of Quote Pricing Flags when a Quote is Versioned, page 10-6
Tax Updated On	No	No
Tax Status	No	No
Assistance Requested	No	Yes
Assistance Reason Code	No	Yes

Behavior of Quote Pricing Flags when a Quote is Copied

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Automatic Price Flags - Incomplete or Complete with a price affecting change pending	Complete	Complete

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Automatic Price Flags - Complete indicator	Complete	Complete
Automatic Price Flags - Incomplete while the quote is submitted for batch processing	Incomplete	Complete
Manual Price Flags - Incomplete or Complete with a price affecting change pending	Incomplete	Incomplete
Manual Price Flags - Complete	Complete	Incomplete
Manual Price Flag - Incomplete while the quote is submitted for batch processing	Incomplete	Incomplete

Behavior of Quote Pricing Flags when a Quote is Versioned

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Automatic Price Flags - Incomplete or Complete with a price affecting change pending	Complete	Complete
Automatic Price Flags - Complete indicator	Complete	Complete
Manual Price Flags - Incomplete or Complete with a price affecting change pending	Incomplete	Incomplete

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Manual Price Flags - Complete	Complete	Incomplete

Creating Proposals from Quotes

This chapter covers the following topics:

- Overview of Proposals
- Creating a Proposal

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.

See also:

Creating a Proposal, page 11-1

Creating 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

To create proposals from Oracle Quoting, use the Proposals tab.

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

Initiating Approvals

This chapter covers the following topics:

- Overview of Approvals
- Initiating an Approval
- Viewing Approval Details
- Cancelling the Approval Process
- Approving a Quote
- Rejecting an Approval
- Reassigning an Approval

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.

Note: If approval rules are not defined, the user can self approve the quote. Instead of submitting the quote for approval, the user can click the **Approve Quote** button and the quote is approved.

Initiating an Approval

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

Prerequisites

- The Approvals subtab must be enabled using OA Personalization.
- 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*.

To initiate an approval, navigate to 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 e-mail 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. To be able to skip approvers, enable the Skip Approvers region using OA Personalization.

Viewing Approval Details

Prerequisites

- The Approvals subtab must be enabled using OA Personalization.

Field Behavior

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

Cancelling the Approval Process

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.

Approving a Quote

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

Prerequisites

- The Approvals subtab must be enabled using OA Personalization.
- You must have access to the operating unit in which the quote is created. If not, you cannot approve the quote.

Navigate to Self Service Applications > Workflow Administrator Web Applications > Worklist.

Field Behavior

- [Click Here For Quote Details](#)

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

Rejecting an Approval

Prerequisites

- The Approvals subtab must be enabled using OA Personalization.

To reject an approval, navigate to Self Service Applications > Workflow Administrator Web Applications > Worklist.

Reassigning an Approval

Prerequisites

- The Approvals subtab must be enabled using OA Personalization.

To reassign an approval, navigate to 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 following topics:

- Overview of Sales Contracts
- Viewing Contract Details
- Authoring and Negotiating Contract Terms
- Associating a Contract Template to a Quote
- Changing Contract Templates
- Removing Terms
- Adding and Deleting Sections
- Updating Clauses
- Creating Non-Standard Clauses
- Viewing the Deviations Report
- Moving Contract Terms
- Renumbering Contract Terms
- Resolving Alternate Clauses
- Checking for Clause Updates
- Entering and Updating Clause Variables
- Adding Unstructured Contract Terms
- Previewing Contract Terms
- Managing Contract Documents
- Viewing Contract Documents
- Adding Contract Documents
- Deleting Contract Documents
- Validation

- Printing Quotes with Contract Terms
- Order Submission with Contract Terms

Overview of Sales Contracts

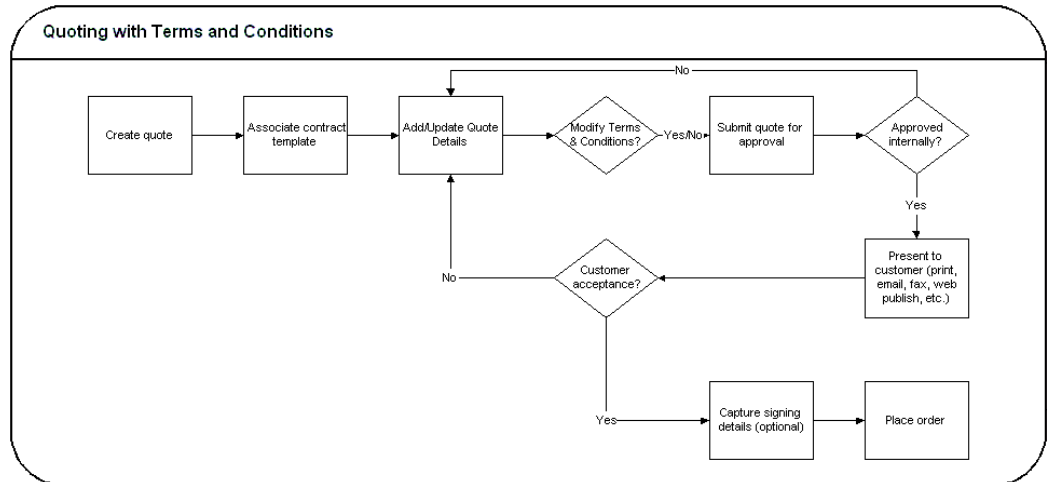
Important: It is strongly recommended that you implement Approvals if you plan to integrate with Oracle Sales Contracts and use the Contract Terms features. Use of the approvals process can help ensure that non-standard contract language receives additional approvals before the contract is presented 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

Tip: Oracle Quoting supports only Contract Templates created with the document type Sales Quote. Refer to the *Oracle Sales 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 user selects the **Contract Terms** subtab in Oracle Quoting. Consult the *Oracle Quoting Implementation Guide* 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 the *Oracle Sales Contracts Implementation and Administration Guide* for more details.

Viewing Contract Details

After selecting a quote to view, you can view contract details by selecting the **Contract Terms** subtab from the Quotes page. 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

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 submitted for batch pricing

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 the 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. Oracle Quoting passes the access level, depending on the status of the quote and quote security setup, to Sales Contracts.

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.

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
- The quote must not be in the read-only status.
- You must have update access to the quote

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 Sales Contracts Implementation and Administration Guide*.

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 subtab to do so.

Field Behavior

- Contract Template

A contract template is defaulted from the system parameter *Default Contract Template*.

Notes

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

Changing Contract Templates

You can change a contract template for 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.

Notes

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

Removing Terms

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

Notes

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

Adding and Deleting Sections

You can add and delete sections in the contract from the Contract Terms page.

Updating Clauses

When you update a clause, it becomes a non-standard clause.

Navigate to Quoting > Quote name > Contract Terms tab > Update Terms button. Select the clause to update, and click **Make Non-Standard** to update.

Field Behavior

- Focus

Select the icon beside a section or sub-section name to see the clauses in the section.

- Protect Text check box

If selected, you cannot update the clause.

- Value flashlight icon

Select the 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 Sales Contracts Implementation and Administration Guide*.

Creating Non-Standard Clauses

Notes

- In the Add Clause page, click the **Create Non-Standard Clause** button.

Tip: You can also create non-standard clauses from a standard clause.

Viewing the Deviations Report

Quoting generates a Deviations Report 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. The report highlights all the additions, revisions, and removals of standard clauses on a contract template.

The Deviations Report displays the Standard sections or clauses that have been changed. Use the Compare Text feature to view the exact changes made.

Notes

- The Compare Text page displays a red line comparison of changes made to the clause text. Inserted text is underlined, deleted text is marked with a strike-through line.
- Changes to embedded variables within clause text are not compared on a quote. Variable tags are compared, not variable values.

Moving Contract Terms

You can move sections or clauses in a Contract and arrange them as per your requirements.

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 Renumbering Contract Terms, page 13-7 for more information.

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 *Oracle Sales Contracts Implementation and Administration Guide*.

Notes

- 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.

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.

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.

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 Sales Contracts Implementation and Administration Guide*.

Adding Unstructured Contract Terms

You can modify a structured contract term or upload a newly authored document as Contract Terms for the quote. To modify the structured contract terms, you can download the existing structured terms to a file (Rich Text Format or Microsoft Word 2003 format), make the required modifications, and upload the document back into the quote. This document is now considered the Contract Terms for the quote. Alternatively, you can also upload a newly authored document (of any file type) as the Contract Terms, with or without a Contract Template being associated with it.

A quote is considered to have contract terms if the Contract Source displays Structured Terms or Attached Document.

Modifying Existing Structured Contract Terms

If the quote has structured contract terms associated with it, the Contract Source is

displayed as Structured Terms. You must download it, modify the terms as required, and upload the document back. The Contract Source remains Structured Terms.

Notes

- Select the Download Contract option from the Actions list.
- Lock the contract to prevent another user from modifying it till you download the structured contract term.
- Select Unlock Contract from the Actions list when you are ready to upload the modified contract terms.
- Select Upload Contract from the Actions list to upload the modified terms.
- Select Structured Terms from the New Contract Source list when you upload the modified contract terms.
- You can retain the structured terms for reporting purposes by selecting the Enable Structured Terms for Reporting check box.

Uploading a New Document as Contract Terms

If the quote has structured contract terms associated with it, the Contract Source is displayed as Structured Terms. If you do not want the existing terms, you can upload a completely new document that will be the new terms. The Contract Source now displays Attached Document.

Notes

- Select Upload Contract from the Actions list to upload the new document.
- Select Attached Document from the New Contract Source list when you upload the new terms.
- You can retain the structured terms for reporting purposes by selecting the Enable Structured Terms for Reporting check box.

Previewing Contract Terms

You can preview the contract terms attached to the quote. The preview is generated in a PDF format.

If the contract terms on the quote is unstructured, i.e. the Contract Source is Attached Document, the preview is generated only if the following conditions are satisfied:

- The attachment exists and it is the Primary Contract Document
- The document Category is Contract

- The Authoring Party is Internal
- The document is in .rtf format.
- The Oracle Contract version information is embedded within the document.

Notes

- If the document is in any other format, Quoting opens the document using the application that the document is associated with.
- If the Oracle Contract version information is not available, the contract terms cannot be previewed.

Managing Contract Documents

Contract documents are files manually attached to a quote that represent or are 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.

Viewing Contract Documents

Notes

- Select Manage Contract Documents from the Actions LOV in the Contract Terms page.
- To view the contract documents for a particular Document Category, choose the proper category.

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.

To add a contract document, select Add a New Document in the Manage Contract Documents page.

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.

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 to fix warnings. For more information on warnings, see the *Oracle Sales Contracts Implementation and Administration Guide*.

Notes

- To manually validate a contract, select Validate from the Actions LOV.
- 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.

Printing Quotes with Contract Terms

To print quotes containing contract terms, you use the Oracle XML Publisher printing solution.

The Oracle XML Publisher printing solution provides the ability to generate a printable PDF or RTF document that can be formatted according to the 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*. Quotes printed using XML Publisher can be either in PDF or RTF 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.

If the contract terms on the quote are unstructured, i.e. the Contract Source is Attached Document, the attachment is merged into the printed quote if the following conditions are satisfied:

- The attachment exists and is the Primary Contract Document
- The Category of the Contract Term is Contract
- The Authoring Party is Internal
- The attachment is in .rtf format
- The attachment is generated from within the Oracle E-Business Suite.

If any of the above conditions are not satisfied, the printed quote is generated without any terms and conditions.

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

Tip: 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.

Prerequisites

- *OKC: Enable Sales Contracts* must be set to *Yes* at the appropriate level.

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

Notes

- To print a quote, select Print Quote from the Actions LOV.
- If there are validation issues, a page may display warnings.
- Depending on your browser settings, 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.

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 covers the following topics:

- Overview of Security
- Quote Access Security
- Quote Function Security
- New Quote Security
- Adding a Resource to the Quote Sales Team
- Changing the Primary Salesperson

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 through OA Personalization by enabling or disabling of fields in the UI.

New Quote Security

New Quote Security determines if users can create new standalone quotes.

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 system parameter *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.

Quote Access Security

Quote access security takes place in three levels: Operating Unit Security, Quote Availability Security, and Data Security.

- **Operating Unit Security**

The Multiple Organization Access Control feature enables users to access one or more 'Operating Units' within one user responsibility. The flexible security profile *MO: Security Profile* controls the access for one responsibility to multiple Operating Units. The security profile will permit access to one, multiple or all Operating Units in the system.

- Users may be given access to one or more operating units, with one of the operating units marked as the default. The user can access quotes across operating units seamlessly and does not have to switch responsibilities.
- Users must select the operating unit at the time of creating the quote or quote template. This cannot be changed once the quote or quote template is saved.
- Search results display quotes from all operating units that the user has access to.

The Quote Availability and Data Security are available when the *ASO: Enable Security Check* profile is enabled.

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

If the user is a manager, all quotes for teams where the user's subordinates are members are also available.

- **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 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: If the *ASO: Manager Role Access* profile is set to *Update*, the manager can update all quotes for the sales team(s) that 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.

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 in the 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 user has the ability to change the selected price list for a quote if the Price List field is enabled using OA Personalization. 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 user can create new customers if the Create Customer button is enabled using OA Personalization in Quoting HTML UI. This 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 — Enable the **Create Contact** and **Create Address** buttons via OA Personalization.
- Update sales team information — The value in the 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 the profile options *ASO: Modify Sales Credits* and *ASO: View Sales Credits* determine if users can view and/or modify sales credit information.

For information on OA Personalization, refer the *Oracle Applications Framework Personalization Guide*.

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, the 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*, a user who is a manager 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

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, the 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 belonging to the same sales group (assuming the user is a manager), 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.

- 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.

New Quote Security

New quote security controls the user's ability to create new quotes. It is controlled by the profiles *ASO: New Quote Security* and *ASN: Customer Access Privilege*.

If the profile is set to *Yes*, the user cannot create new standalone quotes unless the quote is created from an opportunity. If set to *No*, the user can create new standalone quotes. They can copy existing quotes to new quotes and creating quotes from opportunities.

If the *ASN: Customer Access Privilege* 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: Create customer sales teams using the Territory Manager module of Foundation, Oracle Sales or Oracle TeleSales.

Adding a Resource to the Quote Sales Team

Prerequisites

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

To add a resource to the quote sales team, navigate to Quoting > Sales Team.

Field Behavior

- Full Access

If selected, sales team members have the ability to update quotes assigned to them.

Changing the 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.

To assign a new primary salesperson, change the sales representative assigned in the Primary Salesperson field in the Quote Header.

Assigning Sales Teams and Allocating Sales Credits

This chapter covers the following topics:

- Overview of Sales Team Assignments
- Assigning a Sales Team Using Territory Manager
- Overview of Sales Credit Allocation
- Performing an Automatic Sales Credit Allocation
- Performing a Manual Sales Credit Allocation
- Overview of Projected Commission
- Viewing Projected Commission Calculations for a Quote

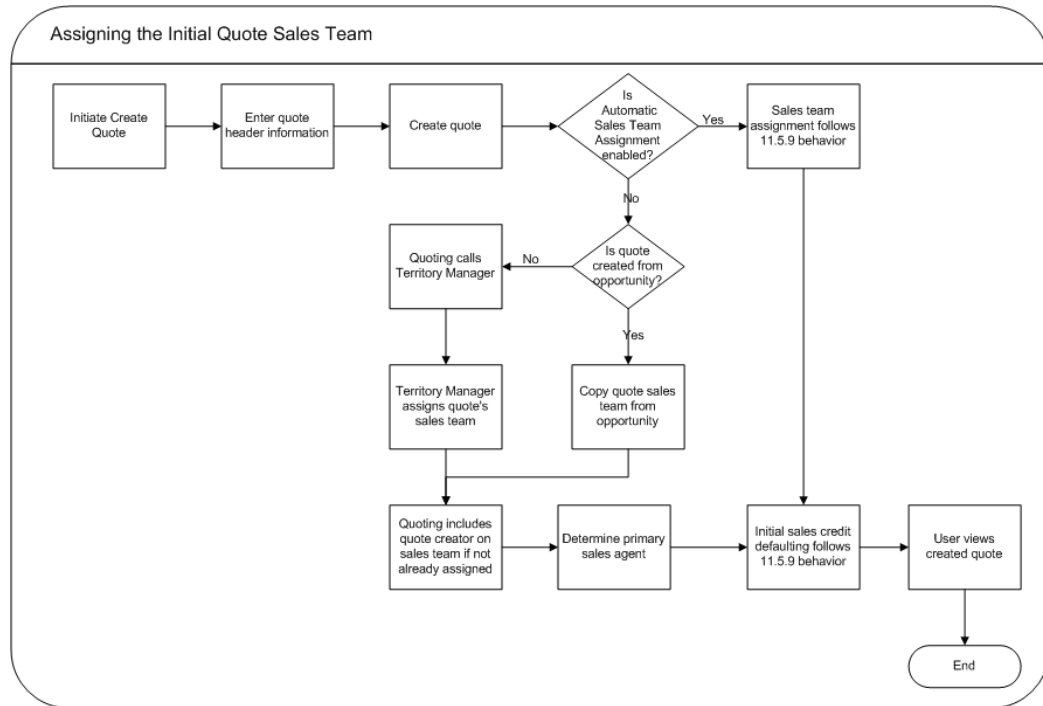
Overview of Sales Team Assignments

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 the sales teams at quote creation, and on user request. If set to *Full*, Quoting calls Territory Manager to assign the sales team at quote creation, order submission, and on user request.

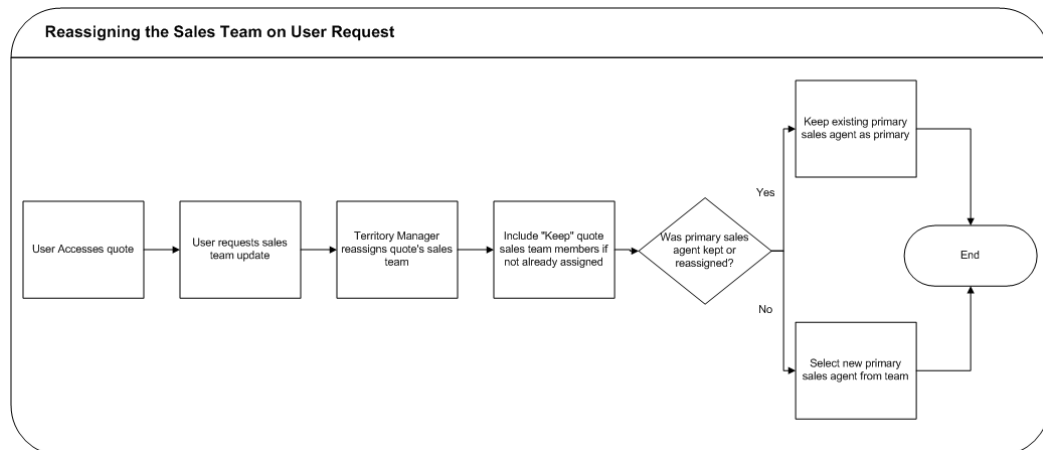
Note: If this profile option is set to either *Full* or *Partial* and sales credit allocation is also enabled, Quoting calls Territory Manager for sales team assignments when a user requests a sales credit update.

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 *Do Not Reassign* 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.

Assign Territory Access Concurrent Program

This program updates the Quoting sales teams based on any territory changes made in Oracle Territory Manager. Users with the Sales Administrator responsibility can schedule to run the concurrent program.

Do Not Reassign Flag

The Do Not Reassign flag indicates whether a resource will be preserved on the sales team during sales team assignment. Any resource without the Do Not Reassign 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 Do Not Reassign 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 *Default Salesrep* system parameter. 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 the *Default Salesrep* system parameter.

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 Overview of Sales Team Assignments, page 15-1 for more information.

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.

To manually call Territory Manager for sales team assignment, navigate to Quoting > Sales Team

Field Behavior

- Reassign Team

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.

Overview of Sales Credit Allocation

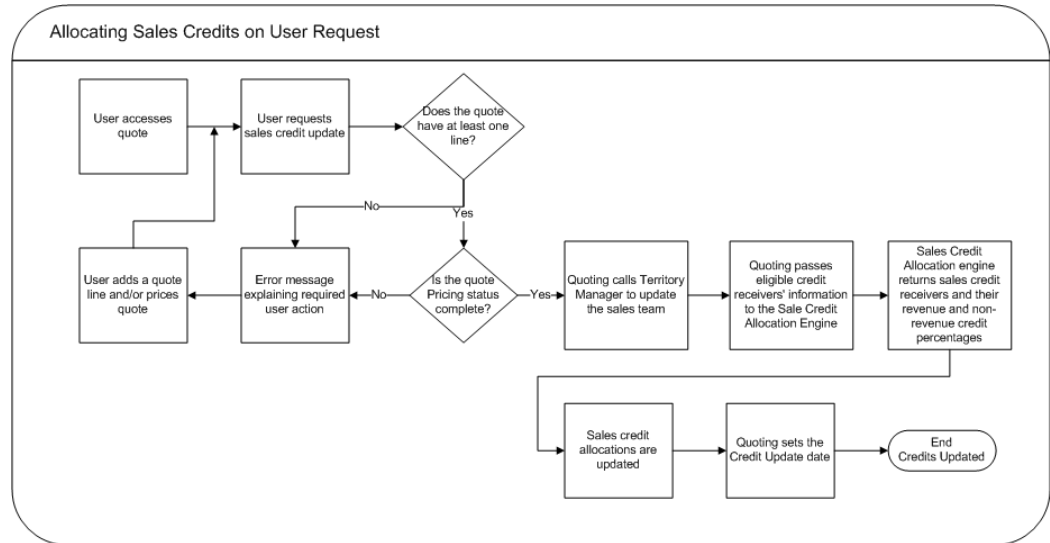
Through integration with Oracle Incentive Compensation (OIC) or another sales credit allocation engine, you can automatically determine sales credit allocations for quotes. After updating the sales team using Oracle Territory Manager, Quoting will pass the sales representatives and their roles to the 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* respectively.

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 Adding a Resource to the Quote Sales Team, page 14-6 for more information.

Once Quoting determines 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 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.

Performing an Automatic Sales Credit Allocation

Prerequisites

- The *ASO: Automatic Sales Credit Allocation* profile must be set to *Partial* or *Full*
- The *ASO: Automatic Sales Team Assignment* profile 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, the *ASO: Run Sales Credit Update for Quote Lines* profile must be set to *Yes*.
- The user has Update access and the quote is updateable.

To perform a sales credit allocation, select Update Sales Credits from the Actions LOV.

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 disabled to enter manual sales credits.

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.
- The profile *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.

Notes

- To manually allocate sales credits, click the Sales Team tab in the Quoting page.
- 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 clicking **Apply**, the header level sales credit is defaulted into the line.

However, once you assign a line level sales credit and click **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.
- To search for revenue sales credits, choose a revenue credit type and enter a percentage.
- To search for non-revenue sales credits, choose a non-revenue credit type and enter a percentage.

Overview of Projected Commission

Note: You cannot use projected commission functionality unless sales team assignment and sales credit allocation are enabled. The profiles *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 (OIC) integration, Quoting users can view their projected commission for:

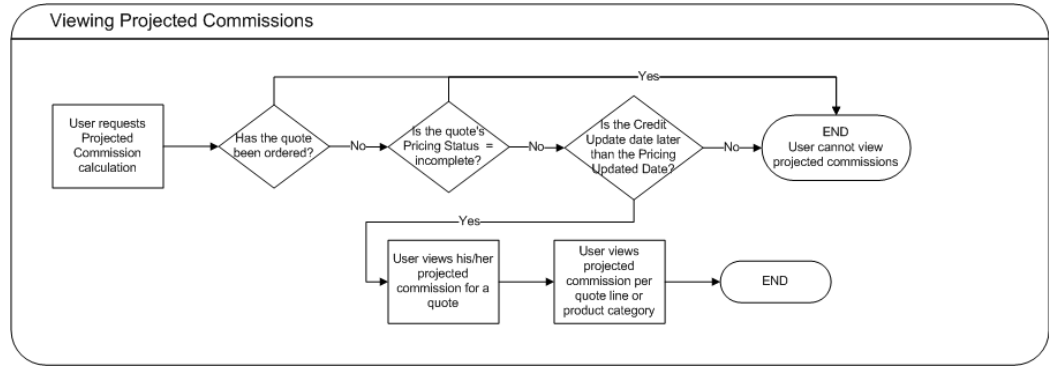
- An entire quote
- Each quote line
- Each product category

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 is used.

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.

See also:

Viewing Projected Commission Calculations for a Quote, page 15-9

Viewing Projected Commission Calculations for a Quote

Prerequisites

- The profile *ASO: Calculate Projected Commission* is set to *Yes*
- The profile *ASO: Automatic Sales Credit Allocation* is set to *Full* or *Partial*
- The profile *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 Pricing Status is Complete
- The Sales Credit Update Date is later than the Pricing Update Date

To view projected commission for a quote, select View Commission from the Actions

LOV.

Notes, Tasks, and Attachments

This chapter covers the following topics:

- Overview of Notes, Tasks, and Attachments
- Adding Notes to a Quote
- Creating a Task
- Adding an Attachment

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 *Sales Assistance* note type is seeded in Quoting.

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.

Adding Notes to a Quote

Field Behavior

- More button

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

Creating a Task

Notes

- Fill out the Create Tasks form as described in the *Oracle Common Application Calendar Implementation Guide*.

Adding an Attachment

Attachments can be of the following types: Files, URLs, text, and document references retrieved from a document catalog. You can enter a description for an attachment and also specify a category for it. For an attachment that is free text, you must specify a name.

Prerequisites

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

Notes

- You can insert attachments in the header and line levels of a quote.
- You can update an attachment if the attachment's usage is not Standard.
- You can delete attachments in a quote even if it is in a read-only state.

Field Behavior

- Add

Select the type of attachment to insert from the LOV:

- File/Web Page/Select

Specify a description and category for the attachment, and define the attachment.

- From Document Catalog

You can specify the search criteria to select a document from the catalog.

Printing and Publishing

This chapter covers the following topics:

- Overview of Printing
- Printing a Quote
- Overview of Publishing Quotes
- Web Publishing a Quote
- Unpublishing a Quote
- Viewing Sales Representative Assistance Requests

Overview of Printing

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

The printouts 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, e-mail 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 a valid contract template is associated with the quote.

The Signature block is added if the quote is executable.

The printing functionality in Quoting is implemented through Oracle XML Publisher. You can choose between two output formats: PDF format or Rich Text Format (RTF).

The print layout defaults based on the value defined in the profile option *ASO: Default Layout Template*.

See also:

Printing a Quote, page 17-2

Printing a Quote

Prerequisites

- The highest version of the quote must be used.

Notes

- Select Print Quote from the Actions LOV.
- 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
XML Publisher offers you the choice between the PDF or RTF output formats.

- **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.
- **Print in Executable Mode**
If checked, the quote is printed along with a signature section.
- **Template**
For XML Publisher, the seeded template defaults from the profile option *ASO: Default Layout Template*.
- **Show Header Attachments**
This field can be enabled/disabled using OA Personalization.
If selected, all header level Text type attachments in the Miscellaneous document category will print.
- **Show Line Attachments**
This field can be enabled/disabled using OA Personalization.
If selected, all line level Text type attachments in the Miscellaneous document category will print.
- **Show Header Sales Supplement**
Displayed if the Sales Supplement subtab is enabled at the header level using OA Personalization.
- **Show Line Sales Supplement**
Displayed if the Sales Supplement subtab is enabled at the line level using OA Personalization.

Overview of Publishing Quotes

Sales representatives have the ability to share quotes with customers by web

publishing. A quote version may be web published if it meets all of the following conditions:

- The user has update access to the quote
- The highest version of the quote must be used
- The quote is not in Order Submitted or Inactive status
- The profile *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

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. If the customer is not an FND_USER, the sales representative can create an FND_USER for the customer by entering a user name when attempting to publish a quote.

See also:

- Web Publishing a Quote, page 17-4
- Unpublishing a Quote, page 17-5

Web Publishing 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.

Notes

- To web publish a quote, select Web Publish from the Actions LOV.

- If the customer is not an FND_USER, you will be prompted to create a user with a valid e-mail address. You must also choose a preferred language for the user. A Welcome to Store e-mail notification is sent to the customer.

Important: Based on the setup in Centralized User Administration, you must have Single Sign-on compliance to create FND_USERS. For more information, refer the *Oracle iStore Implementation and Administration Guide*.

- If the customer is an FND_USER, you can submit the quote for web publishing directly. The Web Publish Quote e-mail notifications are sent to the customer and to you.
- You have the option not to web publish the quote after creating the user.
- 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. If the customer has access to restricted Store minisites, these are listed as well. You can choose to publish the quote in restricted minisites as well as public access minisites.

Unpublishing 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 user must have update access to the quote.
- The quote is not in Ordered or Inactive status.

To unpublish a previously published quote, select Web Unpublish from the Actions LOV.

Viewing Sales Representative Assistance Requests

When a customer requests sales representative assistance for a shopping cart or quote

via iStore, you can view the assistance request in the quote.

There could be two flows in such a scenario. When a customer requests for assistance from iStore during online shopping, a quote is created and the request is visible in the quote. A customer can also request for assistance after a quote is published to a web store.

Prerequisites

- The Assistance Request fields are hidden by default. You must enable them using OA Personalization. For information on OA Personalization, refer the *Oracle Applications Framework Personalization Guide*. Once enabled, the fields are visible in the quote's header.

Field Behavior

- Assistance Requested

This criterion shows if an iStore customer has requested sales representative assistance for the quote. It is Yes if the customer has requested assistance, No if the customer has not. Click the link next to this field to view the request note.

- Assistance Reason

This criterion shows the reason code the iStore customer selected in the assistance request.

Placing Orders

This chapter covers the following topics:

- Overview of Placing Orders
- Placing an Order

Overview of Placing Orders

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

Placing 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.
- The profile *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.

Notes

- To place an order, select Place Order from the Actions LOV.
- Once an order is placed, the order number appears as a hyperlink in the Quote Header. 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 when it is submitted as an order. 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 as an order.

Using Folder Functionality

This chapter covers the following topics:

- Using Folder Functionality to Customize Forms
- Fields That Cannot be Hidden

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.

Notes

- Use the Folder menu to customize the form.
- 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*.

Fields That Cannot be Hidden

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

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

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

Form	Field
Quote Header > Addresses	Ship To Address Details
Quote Header > Addresses	Default From Quote To (Bill To)
Quote Header > Addresses	Default From Quote To (Ship To)
Quote Header > Addresses	Bill To Customer
Quote Header > Payment, Shipping	Payment Terms
Quote Header > Payment, Shipping	Payment Type
Quote Header > Tax	Tax Handling
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

Form	Field
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
Price Adjustments > Details (for a Promotional Good - promotional item)	Qualifying Product

Form	Field
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 chapter covers the following topics:

- Overview of Creating Quotes
- Quote Status
- Creating a Quote
- Selecting an Existing Customer in the Oracle Quoting Form
- Creating a Quote From an Opportunity

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 field.

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

Quote Defaulting

You may notice that when you select the option to create a quote, the form opens with some of the fields having values in them. This is possible because of defaulting rules.

The quote header defaulting rules are applied for each field that does not have a value and has a defaulting rule set up for it. The quote line defaulting rules are applied when a quote line is created. If a trigger attribute is subsequently changed, then the dependant attributes are cleared and defaulted again. For example, if the pricing agreement (trigger attribute) is changed, then the payment terms and price list (dependant attributes) values are cleared and the defaulting rules are applied again to derive fresh values. For more information on setting up defaulting rules, refer the *Oracle Quoting Implementation Guide*.

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 you had not specified a name for the quote, the name is generated as Quote for <Customer Name>.

Quote number, customer, customer account (if specified), and operating unit fields 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 Sales, Oracle TeleSales, or Oracle Quoting - HTML.

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. See Section Quote Status, page 2-2 for more details. These restrictions and permissions can be fully determined by your organizational policies and implemented by your System Administrator.

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 or in the Approval Pending statuses
- 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.

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

Pre-Defined Quote Statuses

The following table shows the available seeded quote statuses.

Predefined Quote Statuses

Quote Status	Description	Read-only
Approval Canceled	Sales representative canceled the approval process.	No

Quote Status	Description	Read-only
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

Quote Status	Description	Read-only
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 and remove attachments. You cannot 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.

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.

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

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 *Customer Data*, page 25-1 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
- Primary Sales Group
- Expiration Date
- Order Type
- Currency
- Operating Unit
- Quote Number (if *ASO: Automatic Numbering* is set to *No*)

Field Behavior

- Quote

The name of the quote 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. For more information on the profile, 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 *Customers and Relationships*, page 25-1 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.
- Status

This status of the quote 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 system parameter *Default Order Type*.

- Operating Unit

This LOV displays all the operating units that you have access to. The default value is based on either the defaulting rules setup or the `MO_UTILS.Get_Default_OU` API.

- 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 *Default Salesrep* system parameter.

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 system parameter *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.

Selecting an Existing Customer in the Oracle Quoting Form

Prerequisites

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

Field Behavior

- Customer LOV

Displays customers with or without active accounts. The customer list displayed is based on the value set in the *ASN: Customer Access Privilege* profile. 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 *Creation of Accounts*, page 25-4 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.

Notes

- 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*.

Creating a Quote From an Opportunity

If your discussions with the customer has reached an advanced stage, you can create a quote from an opportunity. Many of the values from the opportunity are passed on to the quote. If defaulting rules are set up, some fields in the quote header and lines may obtain values based on the rules. If a trigger attribute is subsequently changed, then the dependant attributes are cleared and defaulted again. For example, if the pricing agreement (trigger attribute) is changed, then the payment terms and price list (dependant attributes) values are cleared and the defaulting rules are applied again to derive fresh values.

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.

Notes

- The following fields, when available, are defaulted and cannot be changed:
 - Customer
 - 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*)
- If the profile option *ASO: Require Service Reference on Add to Quote* is set to *Yes*, the

service items from the opportunity are not copied to the quote. If set to *No*, the service items are copied and the start date is defaulted to the current date. The duration and period default from the values set up in Oracle Inventory for the service item. These can be changed after the quote is created.

Using Quote Templates

This chapter covers the following topics:

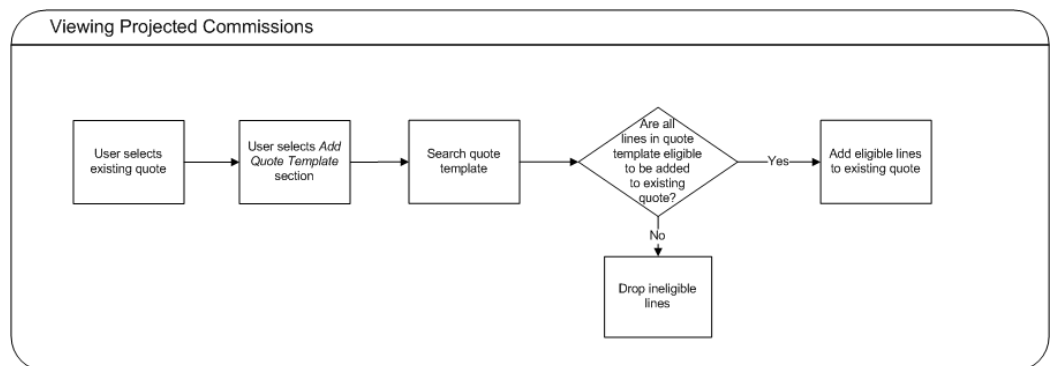
- Overview of Quote Templates
- Adding a Quote Template to an Existing Quote

Overview of Quote Templates

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

While creating a template, you must select the operating unit for it. Only users having access to the operating unit can use the template. The operating unit cannot be changed once the template is created.

In the Forms UI, you can work with templates by choosing the Template Administrator option from Setup.



Adding 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.

Notes

- Log in to Oracle Quoting with the Quoting Sales Manager responsibility.
- Select the quote to add the template to.
- Select Add Quote Templates from the Actions LOV, and search for templates.
- In the Quote Templates Results section, you can select multiple templates by holding down the Shift key for contiguous selection, or non-contiguously by holding down the Ctrl key.
- The Template Details table is a child table of the Results table. It displays the line details of the template selected in the Results table. If multiple templates are selected, the Template Details table displays details for the last template selected.

Searching

This chapter covers the following topics:

- Searching Using the Query Method
- Searching for Quotes
- Basic Search
- Advanced Search
- Searching for Customers
- Using interMedia Search

Searching Using the Query Method

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

- Quote
- 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 Total (Pricing Region)
- Quote Total (Pricing Region)
- Line Category (Pricing Region > Details)
- Line Type (Pricing Region > Details)
- 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.

Prerequisites

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

Notes

- To enter the search criteria, select View > Query by Example > Enter. The color of the searchable fields changes to blue.
- To execute the search, select View > Query by Example > Run.
- Check the status bar to see how many matching entries were found.

Searching for Quotes

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*.

Search results display quotes from all the operating units that the user has access to. For more information on operating units, see *Operating Unit Security*, page 32-2.

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.

Basic Search

Notes

- Select View > Find or click the flashlight icon on the toolbar.

Enter search criteria in the fields in the Basic tab.

- 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*.

Advanced Search

Notes

- Select View > Find or click the flashlight icon on the toolbar.
- Click the Advanced tab and enter your search criteria. The Advanced Search criteria uses operators to search.

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 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 *Using Folder Functionality*, page 19-1 for more information.

Notes

- Select View > Find or click the flashlight icon on the toolbar.
- Select Organization or Person from the Find LOV.
- 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.

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

Tip: While searching for products using *interMedia* Search, enter the partial search criteria in the Product field followed by the '%' wildcard. To view the complete list of search results, click the LOV icon using the mouse or use the keyboard shortcut (Help > Keyboard Help). Do not use the TAB key to open the LOV or click the LOV icon without entering a search criteria in the Product field.

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 chapter covers the following topics:

- Overview of Credit Checks
- Performing a Credit Check

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 and 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 (OM) 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.

Performing 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.

To perform a credit check, select Initiate Credit Check from the Actions LOV.

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 chapter covers the following topics:

- Overview of Pricing
- Specifying Automatic/Manual Pricing and Tax Requests for a Quote
- Reset Pricing on a Quote
- Submitting a Manual Pricing Request
- Viewing Details of the Pricing Request
- Canceling a Pricing Request
- Pricing a Product
- Applying Pricing Agreements
- Applying Pricing Attributes
- Overriding Price Break Level Adjustments
- Pricing Configurable Products
- Applying Promotion Codes
- Adjusting the Price of a Product in the Quoting Form
- Applying a Non-Automatic Discount to a Product or the Entire Quote
- Manually Adjusting Prices in the Price Adjustments Form
- Freezing Prices for a Quote
- Applying Non-Automatic Charges
- Overriding Charge Values

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.)

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.

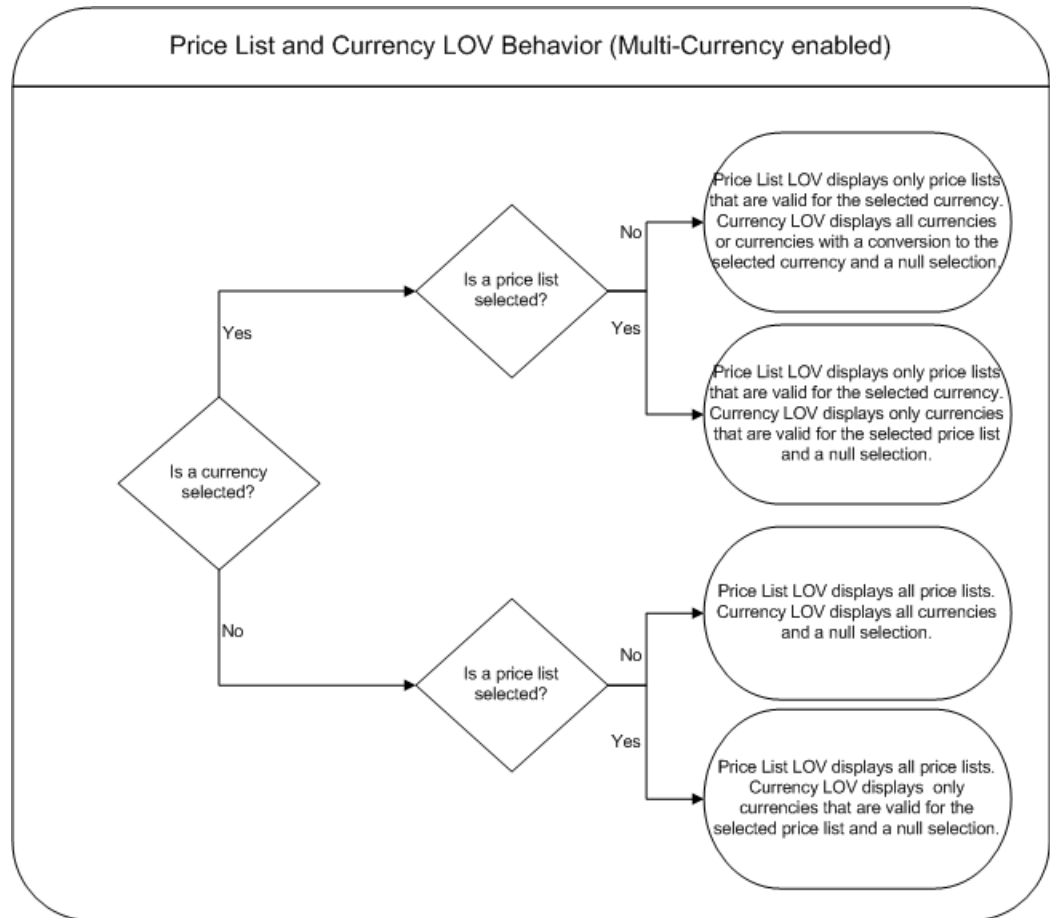
In order to use multi-currency price lists, there must be a conversion list associated with each price list. The conversion list, set up in Advanced Pricing, contains an algorithm that converts the base currency price from the price list into one or more additional currencies.

Caution: 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.

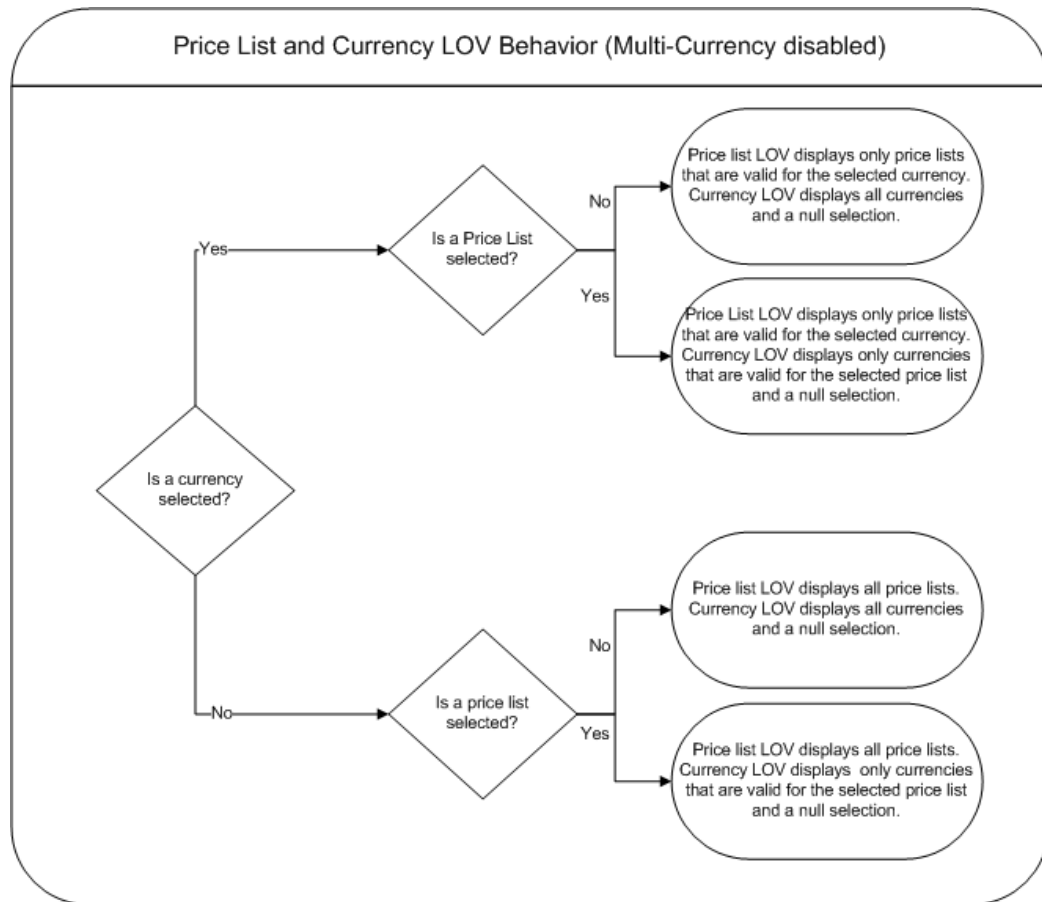
With multi-currency price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

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



Additionally, if the profile *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:



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.

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 by selecting *Adjust Charges* from the Actions LOV. If a line is selected when you choose the action, all charges applied to the line is displayed.

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.

Discounts

Oracle Quoting allows both header-level and line-level discounts. Discounts at the header are applicable to the entire quote and affect 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

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. 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.

Note: The Price List, Agreement and Currency LOVs are based on the Pricing Date in the quote.

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.

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.

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 Install 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.

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.

Caution: The values in the Payment Terms, Freight Terms, and Shipping Method fields, populated based on defaulting rules, may be overridden after the pricing call.

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

Quoting Pricing Behavior

To improve performance, the pricing calls within a quote are restricted. See the notes below to understand the complete pricing behavior.

Notes

- Changes to the quote are preserved while navigating throughout the quote without explicitly pricing the entire quote.
- Updating the quote by adding a new line, making changes to a line, changing price affecting attributes, and so on will result in the respective quote line being fully priced. However, the quote itself is not fully priced and this is reflected in the Price and Tax status indicators.
- The entire quote is saved and priced when any of the following actions are executed:

Quote Header Actions

- Place Order
- Web Publish Quote
- Print Quote
- Duplicate Quote
- Create New Version
- Update Sales Credits
- View Commission
- Freeze Price
- Initiate Credit Check

Sub-tab Actions

- Initiate Approval
- Create Proposal
- Reassign (Sales) Team
- Update (Contract) Terms

Clicking any of the following hyperlinks

- Customer Name (Quote To, Bill To, Ship To, End Customer)

- Account Number/Details (Quote to, Bill To, Ship To, End Customer)
 - Contact Name (Quote To, Bill To, Ship To, End Customer)
 - Address (Quote to, Bill to, Ship to, End Customer)
 - Version Number
 - Opportunity (Link, Detail)
 - Proposal Name
 - If the profile *ASO: Pricing Change Alert* is set to *Yes*, a message is displayed notifying you that a price affecting change has been made to the quote. If the profile is set to *No*, the notification message is not displayed.
 - If a price affecting change is made to the quote, the Pricing and Tax status flags display Incomplete. In case Automatic Pricing is set, the quote is re-priced when the quote is saved or the Price Quote action is initiated. If the quote is set for Manual Pricing, the quote is re-priced only when the Price Quote action is selected.
- Important:** In spite of the quote being set to Automatic Pricing, the entire quote is re-priced only when the quote is saved or the Price Quote action is initiated.

Specifying Automatic/Manual Pricing and Tax Requests for a Quote

The price of a quote is affected when a change is made that affects pricing. A quote change that affects the price will also affect tax calculations. 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

There are two fields in the quote that you can select to enable automatic or manual pricing and tax for individual quotes. Two profile options govern the initial values of these fields.

If the profile option *ASO: Calculate Price* is set to *Manual*, the *Manual* option is selected in the Price Calculation LOV. However, if you wish to automatically price this quote alone, you can select *Automatic* from the LOV. The profile setting is not overridden and remains *Manual* for other quotes.

If the profile *ASO: Calculate Tax* is set to *Manual*, the *Manual* option is selected in the Tax Calculation LOV. You can select the *Automatic* option to enable automatic tax calculation provided you have selected the *Automatic* option in the Price Calculation LOV.

Note: Setting the profile *ASO: Calculate Price* to *Manual* and the profile *ASO: Calculate Tax* to *Automatic* is not supported because quote tax is based on the quote product pricing. Similarly, in the UI, you cannot select the Automatic Tax check box in the quote when the Automatic Pricing check box is not selected.

Pricing and Tax Indicators

Action	Automatic Pricing/Tax	Manual Pricing/Tax
Price affecting change	• The affected lines are fully priced. • The Pricing and Tax status flags display Incomplete. • The entire quote is repriced and taxed when the quote is saved or the Price Quote action is initiated.	• The affected lines are not repriced. • The Pricing and Tax status flags display Incomplete • The entire quote is repriced and taxed when you initiate the Price Quote action.

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 on this profile.

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 an individual quote is particularly helpful when you 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 large number of quote lines in a quote template or applying multiple quote templates to a quote
- 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, you cannot:

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

Reset Pricing on a Quote

You can remove any price overrides and non-automatic adjustments applied to a quote via the Reset Pricing button. This button is available on the Quote Header and at the Line Level Pricing Adjustment regions.

When you initiate reset pricing, any price overrides and non-automatic adjustments are removed.

In the *Automatic* pricing mode, when pricing is reset from the Quote Header, a full blown pricing call is made resetting the prices on the entire quote. If the pricing is reset from a quote line, the quote line alone is repriced.

In the *Manual* pricing mode, irrespective of where the reset pricing action is initiated, the entire quote is repriced.

Submitting a Manual Pricing Request

Irrespective of the profile and check box settings, you can still manually price a quote by selecting the Price Quote action. Manual pricing and tax calculations allow you to capture the most recent price/tax information.

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.

To manually price a quote, navigate to Quoting > Price Quote

Notes

- If the Price Calculation and Tax Calculation fields are set to *Automatic* and you select the Price Quote action, the Price Quote page will not be shown but the quote will be priced. For any other combination of these field values, the Price Quote page is displayed.

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

- If you have the profile *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 the profile *ASO: Enable Batch Processing* is set to *No*, these options are not available and the application defaults to *Now*.
 - 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 completed 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.

Viewing Details of the 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: After the batch pricing request completes, the user will receive an e-mail notification.

To view pricing request details, navigate to Quoting > Actions > Pricing Request Details

Canceling 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.

To cancel a pricing request, select Cancel Pricing Request from the Actions LOV.

Pricing a Product

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 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

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. Pricing agreements that are not specific to a customer are always displayed.

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 be 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.

Applying Pricing Attributes

Prerequisites

- Pricing attributes must be set up in Oracle Advanced Pricing.

To apply custom pricing attributes, navigate to:

- Quoting > Quote Lines tab > Pricing Attributes (line)

Notes

- To apply custom pricing attributes, 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.

Note:

- In the Forms UI, pricing attributes can be specified when adding the product or service in the Quote Lines table. Additionally, pricing attributes can also be specified after the product or service has been added to the quote.

However, pricing attributes cannot be specified in the following scenarios:

- Adding quote lines in the configurator session
 - Adding related products
 - Applying quote templates
 - Creating a Quote from an Opportunity
-
- Custom pricing attributes are supported at the line level only.

Overriding Price Break Level Adjustments

Price breaks are quantity delimiters to which are associated prices or discounts by range of quantity and amount. These breaks may occur at either the line-level or the quote header-level and can be associated with a line or group of lines.

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

Prerequisites

- The Override Flag in Oracle Pricing must be enabled for the adjustment modifier.
- The profile *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.

To override price break level adjustments, select Price Adjustment from the Actions LOV in the Quote Header or Quote Lines tab.

Pricing Configurable Products

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

Prerequisites

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

To price configurable products, navigate to Quoting > Lines

Notes

- List prices for each configured component are visible in Oracle Configurator.
- The total price for the configured model appears in the Line Total field in the Details region.

For setup details, refer the *Oracle Configurator Master Index* and the *Oracle Configurator Implementation Guide*.

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, select Promotions/Pricing Attributes from the Actions LOV.

Prerequisites

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

Field Behavior

- Level

Displays the level at which the promotion is applied. Available values, which are designated in Pricing, are *Order* and *Line*.

Notes

- After selecting Apply in the Promotions form, the prices in the quote are repriced based on the promotion amount.

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 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. Note that only the Automatic Adjustment price changed whereas Manual Adjustment price remained the same after repricing.

Repricing Example

	Before Reprice	After Reprice
Unit List Price	\$100.00	\$100.00
Automatic Adjustment (Discount)	\$20.00	\$10.00
Manual Adjustment (Discount)	\$20.00	\$20.00
Unit Net Price	\$60.00	\$70.00

Manual adjustments include discounts and surcharges.

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 Selling Price field is read only.
- If the product is a promotional good, the profile *ASO: Enable Promotional Good Price Override* must be set to *Yes*.

Notes

- 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.

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 of line, and line level adjustments.

To apply a non-automatic discount to a product or to the entire quote, select Price Adjustments from the Actions LOV.

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

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 Manually Adjusting Prices in the Price Adjustments Form, page 24-20.
- 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 form 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.

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, select Price Adjustments from the Actions LOV.

Prerequisites

- *ASO: Discounting Privilege* is set to *Full*
- The quote must not be in a read-only status.
- The highest version of the quote must be used.

Field Behavior

- Value

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

- Reason Code

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.

This field is required if you manually change the automatic modifier value and optional if you manually change the manual modifier value.

Notes

- To select a non-automatic adjustment, see *Applying a Non-Automatic Discount to a Product or the Entire Quote*, page 24-18.
- See *Overriding Price Break Level Adjustments*, page 24-15 for information to manually override price break adjustments.

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.

- Pricing Date is not limited to the current date, but can be any date in the past or future.
- The Price List, Agreement and Currency LOVs are based on the Pricing Date.

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.

Field Behavior

- Freeze Prices

If you choose this option, the Pricing Date field in the Summary region shows the current date. This date is used for all subsequent pricing calculations.

- Unfreeze Prices

If you choose this option, the Pricing Date field in the Summary region is cleared. The current date is used for all subsequent pricing calculations.

Applying Non-Automatic Charges

Prerequisites

- To apply non-automatic charges at the line level, you must select a line in the Quote Lines tab.
- The profile *ASO: Discounting Privilege* must be set to *Full* or *Partial*.

To apply non-automatic charges, select Adjust Charges from the Actions LOV.

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 it is 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.

Overriding Charge Values

Prerequisites

- The profile *ASO: Discounting Privilege* must be set to *Full*.

To override charge values in the Charges Summary form, select Adjust Charges from the Actions LOV.

Notes

- You can only override line-level charge values from the line level form and header-level charge values from the header level form.
- You cannot override any charges that are automatically added.

Customers and Relationships

This chapter covers the following topics:

- Overview of Customers and Relationships
- Creating a Customer

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.

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 creating an order from the quote.

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 becomes an order in Oracle Order Management.

The following table shows the mapping of Oracle Quoting terminology to the Oracle Order Management (OM) terminology.

Location in UI	Quoting Terminology	OM Terminology
Quote Header tab	Quote To Customer, Account Number, Quote To Contact, Quote To Address Note: The Quote To address is not passed into OM.	Customer, Customer Number, Contact, Address
Addresses section of the Quote Header tab - Ship To region	Ship To Customer, Ship To Customer Account, Ship To Contact, Ship To Address	Ship To Customer, Ship To Customer Number, Ship To Contact, Ship To Address
Addresses section of the Quote Header tab - Bill To region	Bill To Customer, Bill To Customer Account, Bill To Contact, Bill To Address	Bill To Customer, Bill To Customer Number, Bill To Contact, Bill To Address
Addresses section of the Quote Header tab - End Customer region	End Customer, End Customer Account, End Customer Contact, End Customer Address	End Customer, End Customer Number, End Customer Contact, End Customer Address

This customer data can be grouped into the following areas:

Quote-To Information:

- **Quote-To Customer, Account** — 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 an order is created from the quote.

Bill To Information:

- **Bill To Customer, Account** — The name and financial account of the customer to be invoiced for the goods or services 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, Account** — 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.

End Customer Information

- **End Customer, Account** — The name of the customer who will be the ultimate recipient of the products. In most situations, the Quote To customer is also the end customer. However, there are exceptions to this. For example, you may create a quote for a reseller organization, ABC Corporation. ABC Corporation, in turn, sells to XYZ Corporation. In this case, ABC Corporation is the Bill To Customer and XYZ Corporation is the End Customer as well as the Ship to Customer.
- **End Customer Contact** — A person representing the end customer, only when the end customer is of party type organization.
- **End Customer Address** — A physical location where the products are sent. This

address can be associated with either the end customer or end customer contact.

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 *ASO: Auto Account Creation* profile. This profile 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 becomes an order.
- Create accounts only when Place Order—Accounts are created only when the quote becomes an order.

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

Quoting Behavior Based on Profile Options

Profile Option Setting	Create Sold To	Select Sold To	Create Ship To/Bill To/End Customer	Select Ship To/Bill To/End Customer	Web Publishing	Order Conversion
ASO: Auto Account Creation 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
ASO: Auto Account Creation 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
ASO: Auto Account Creation 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 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
- An order is created from the quote

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 becomes an order.

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* for more information.

Note: The Oracle Receivables Enter Customer form always creates accounts for new customers. Therefore, 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, select Enter Customer from the Actions LOV in the Quote Header.

Prerequisites

- The profile *ASO: Create New Customer* must be set to *Yes* at the appropriate level.

Notes

- Fill in the form as described in the *Oracle Receivables Users Guide*.
- You can create prospect customers from Quoting - HTML, Oracle Telesales, or Oracle Sales.

Entering Address and Payment Information

This chapter covers the following topics:

- Overview of Address and Payment Information
- Defaulting of Addresses
- Entering Billing Information
- Entering Shipping Information
- Entering Quote To Address
- Copying Quote To Information
- Entering Header Shipping Details
- Entering Payment Information
- Entering Line-level Billing
- Entering Line-Level Shipping

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.

Note: The Quote To customer must have at least one active address (any purpose) to create a quote.

- 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 the quote becomes 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.

- **End Customer** — Address where the order is sent. This is applicable in multi-tiered selling models such as indirect sales through partner channels.

This is the address of the customer who may be the final recipient of the order in a multi-tiered selling model. For example, you may create a quote for a reseller organization, ABC Corporation. ABC Corporation, in turn, sells to XYZ Corporation. In this case, ABC Corporation is the Bill To customer and XYZ Corporation is the end customer as well as the Ship to customer.

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. For a component of a configured product, line level shipping and billing addresses can be specified as long as the parent model is not a model that must be shipped together with all its components. Line level billing is controlled by the profile option *ASO: Enable Line Level Billing*.

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:

1. Active Primary Sold To address type usage for the Quote To Contact
2. Identifying address for the Quote To Contact

3. Active Primary Sold To address type usage for the Quote To Customer
4. 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:

1. Active Primary Sold To address type usage for the Quote To Customer
2. 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:

1. Active Primary Sold To address type usage for the Quote To Customer
2. 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:

1. Active Primary Bill To address type usage for the Bill To Contact
2. Identifying address for the Bill To Contact
3. Active Primary Bill To address type usage for the Bill To Customer
4. 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:

1. Active Primary Bill To address type usage for the Bill To Customer
2. 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:

1. Active Primary Bill To address type usage for the Bill To Customer
2. 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:

1. Active Primary Ship To address type usage for the Ship To Contact
2. Identifying address for the Ship To Contact
3. Active Primary Ship To address type usage for the Ship To Customer
4. 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:

1. Active Primary Ship To address type usage for the Ship To Customer
2. Identifying address for the Ship To Customer

End Customer

The End Customer address is defaulted at the time of quote creation based on the following conditions:

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

1. Primary Ship To address type usage for the End Customer Contact
2. Identifying address for the End Customer Contact
3. Primary Ship To address type usage for the End Customer
4. Identifying address for the End Customer

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

1. Primary Ship To address type usage for the End Customer
2. Identifying address for the End Customer

If the End 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:

1. Primary Ship To address type usage for the End Customer
2. Identifying address for the End Customer

Entering Billing Information

If you wish to bill individual lines to different locations, see *Entering Line-level Billing*, page 26-9.

To enter a Bill To customer and address for an order, navigate to Quoting > Quote Header > Addresses

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.

Field Behavior

- Copy From Quote To

Selecting Copy From Quote To copies address information from the quote-to address.

- Bill To Customer and 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.

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.

Notes

- 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.
- The Bill To Account is optional when creating/saving the quote, unless the Bill To Customer has at least one active account.

Entering Shipping Information

If you wish to ship individual lines to different locations, see Entering Line-Level Shipping, page 26-10.

To enter a ship-to customer and address for an order, navigate to Quoting > Quote Header tab > Addresses

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.

Field Behavior

- Copy From Quote To
Selecting Copy From Quote To copies address information from the Quote To address.
- Ship To Customer and 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.

Notes

- 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.
- 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.

Entering Quote To Address

To designate a Quote To Address, navigate to 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 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.

Notes

- 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.

Copying Quote To Information

You can copy the Quote To information to Shipping, Billing, and End Customer addresses separately or to all.

Prerequisites

- You should have 'Update' access to the quote.
- The quote is not in the read-only status.
- The quote is the highest version.
- The quote has not been submitted for batch processing.

To copy Quote To information, select the Addresses option from the quote header.

Entering Header Shipping Details

To enter shipping details, navigate to 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.

This LOV lists all shipping methods available in the lookup SHIP_METHOD.

- 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

- 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.

- Demand Class

Demand Classes allow you to segregate demand into user-defined groups. The LOV for Demand Class is based on the OM Demand Class lookup. Demand Classes are used to check product availability (ATP).

Entering Payment Information

Oracle Quoting allows you to specify payment terms at both the header and line levels of a quote. Depending on the payment type you choose, you can enter the details of a check or a credit card. Other payment types include payment by cash.

Oracle Quoting supports the following payment scenarios:

- Pay for an entire order using a credit card.
- Use different payment methods for select lines.
- Use a credit card to pay for all lines with the exception of one line.
- Oracle Quoting does not support pre-payment terms.
- By default, the payment type field is NULL. If left blank in the Quote header, this could be interpreted as Invoice.

If this field is NULL in the quote line, the value in the header is inherited for the line as well.
- By default, the line level payment details are disabled. You can enable them by setting the *ASO: Enable Line Level Payments* profile to *Yes*. For more details, refer the *Oracle Quoting Implementation Guide*.

- You can specify a PO Number at the line level. If left blank, the header's PO Number is referenced.
- If the payment type is Credit Card at the header level, then the Bill To Customer must be specified at the header level. If the payment type is Credit Card at the line level, then the Bill To Customer must be specified at the line level.

Oracle Quoting supports the use of Payment Terms Substitution. Please see Terms Substitution, page 24-7 for more information.

To enter payment information for your customer, navigate to Quoting > Quote Header > Payment, Shipping

Prerequisites

- The Quote Header tab displays the customer.

Notes

- Payment Terms are defaulted at the time of quote creation based on the Header-level Agreement. Payment term defaulting can also occur when the Header-level Agreement is assigned or changed.
- If the payment type is by credit card and if Oracle Payment is also installed, the application performs a credit card check once the quote is submitted as an order. For more information, consult the *Oracle Payment Implementation Guide*.

Entering Line-level Billing

To designate line level billing information, navigate to Quoting > Lines > Bill-To

Prerequisites

- The item for which you want to designate a different billing address, must be displayed in the Quote Lines tab.
- The *ASO: Enable Line Level Billing* profile 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.

Field Behavior

- Customer

The behavior of this field depends on the setting of the profile option *ASO: Enforce Account Relationships*. See Creation of Accounts, page 25-4.

- 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.

Entering Line-Level Shipping

To designate line level shipping information, navigate to Quoting > Quote Lines tab > Ship-To

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.

Field Behavior

- Customer

The behavior of this field depends on the setting of profile option *ASO: Enforce Account Relationships*. See *Creation of Accounts*, page 7-4.

- 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.

- Requested Date Type

The type of date the customer requests the products to be shipped from the warehouse or received at the Ship To location. This can be either the Arrival or Ship.

- Requested Date

The requested date can either be the shipped date or the received date.

- Demand Class

Demand Classes allow you to segregate demand into user-defined groups. The LOV for Demand Class is based on the OM Demand Class lookup. Demand Classes are used to check product availability (ATP).

- Warehouse

This field is disabled if *ASO: Enable Manual Warehouse Selection* is set to *No*.

Note: You can specify the Warehouse and Requested Date for a component.

- 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

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.

Modifying Quotes

This chapter covers the following topics:

- Modifying a Customer Quote
- Adding Products to the Quote
- Line Numbers
- Adding a Service to the Quote
- Entering Installation Details
- Duplicating a Line
- Configuring a Product
- Viewing Attributes of a Model
- Deleting a Component
- Duplicating an Existing Configuration in a Quote
- Splitting a Configured Line
- Adding a Related Product
- Defaulting Rules in Quote Lines
- Checking Product Availability
- Manually Selecting a Warehouse
- Adding Trade-In Products to Quotes
- Adding a Trade-in to the Current Quote
- Adding a Trade-in From the Customer Install Base
- Splitting Lines
- Entering Quote Tax Details
- Viewing Quote Tax Details
- Viewing Quote Versions

- Using the Customer History Form to View Customer's Quotes
- Viewing the Order History for a Customer
- Applying an Agreement to the Quote
- Entering Sales Supplement Information
- Using Descriptive Flexfields
- Changing the Order Type for a Quote

Modifying a Customer Quote

Whether you can modify a quote depends on its status. Not all quote statuses allow you to make modifications.

Notes

- 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 *Quote Status*, page 20-3 for more information.

Adding Products to the Quote

To add products to the quote, navigate to Quoting > Quote Lines

Prerequisites

- Your customer is displayed in the Header tab of the Oracle Quoting form.

Field Behavior

- Product LOV

Select the product, or enter the product description or part number. The behavior of this field depends on whether *interMedia* Search is enabled. See *Using interMedia Search*, page 22-4 for more information.

Or use the product search, by selecting Actions > Product Search, and copy and paste the part number from the search results to the Product field.

- Product Details

The Product Details form indicates the user item type and whether the product is returnable, serviceable, shippable, or is a support service.

- Qty

The quantity defaults from the profile option *ASO: Default Ordered Qty*. See the *Oracle Quoting Implementation Guide* for more information.

- Price List LOV

You can only select a price list if the profile *ASO: Price List Override* is set to *Yes*.

- Item Type

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 *Configuring a Product*, page 27-8 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.

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.

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.

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 becomes an order.

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:
 - 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.

Adding a Service to a Serviceable Product on the 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.

To enter a service for a serviceable product on the current quote, select Service Items from the Actions LOV.

Notes

- The Service Items form displays included services, services already included with the serviceable product, and available extended services.
- If the service that you select is not on the current price list, you will get a Pricing error when you try to create a line.
- If the service item requires line level mandatory flexfields and/or pricing attributes, then you should not add multiple services at the same time.

Adding a Service to a Quote without a Serviceable Product

To add a service to a quote that does not contain serviceable products, select Service from the LOV in the Quote Lines tab.

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 region 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.

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, select Installation Details from the Actions LOV.

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.

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.

Fill out the form as described in the *Using the Transaction Details Window* section of the *Oracle Install Base User Guide*.

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, select Duplicate Line from the Actions LOV.

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.

Configuring a Product

You can select the optional and mandatory components for a model product. This is done using Oracle Configurator.

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 the profile *ASO: Allow Quantity Updates for Top Level Model Item* is set to *Yes*.
- You can only change the quantity for components if the profile *ASO: Allow Quantity Updates for Component Item* is set to *Yes*.

To configure a model product, navigate to 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.
- A configuration could also be invalid. If there are upper and lower limits for the quantity of a model component, and the user changes the component quantity outside the allowable range, the configuration is complete but invalid.
- In Quoting, you can save invalid or incomplete configurations. However, to place

an order from the quote, the configuration must be complete and valid.

Viewing Attributes of a Model

The attributes of a model and its components are displayed as part of the Product details in the quote line. You can ascertain the following attributes of a model:

- Ship Model Complete

If selected, it indicates that the entire configuration must be delivered in the same shipment. If not selected, components can ship separately.

- Parent Model

Indicates whether the parent model for a model component is an Assemble-to-Order (ATO) model or a Pick-to-Order (PTO) model.

- Top Level Model

Indicates whether the top model for a model component is an Assemble-to-Order (ATO) model or a Pick-to-Order (PTO) model.

The attributes are blank if the quote line is not part of a model configuration.

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. The deletion may also result in an invalid configuration. You can save the quote but cannot place an order unless the configuration is valid and complete.

Note: If you delete a component with an associated service, the service is also deleted.

Prerequisites

- The profile *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

To delete a component, select the line and click the Delete icon from the toolbar.

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.

To duplicate an existing configuration in a quote, select Duplicate Line from the Actions LOV.

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 payment details, line level attachments, and so on.) are copied as well.

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.

To split a configured line, select Split Line from the Actions LOV.

Adding a Related Product

You add related products to substitute an existing product, up-sell or cross-sell. You can add multiple cross-sell products to a quote.

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 quote must not be submitted for batch pricing.

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.

Defaulting Rules in Quote Lines

When you add a quote line, defaulting rules are applied for each field that does not have a value and has a defaulting rule set up for it. When you update a quote line and change a trigger attribute, then its dependant attribute(s) are cleared and defaulted again. For more information on setting up defaulting rules, refer the *Oracle Quoting Implementation Guide*.

Defaulting rules are applied to quote lines when you perform the following actions on a quote:

- Add a product, related product, service item, promotional good to a quote
- Add a service to a previous purchase
- Add a model item from Install Base
- Configure a model

Checking Product Availability

You can check the availability of all products in a quote or the individual product lines

in a quote. Availability is displayed for the following types of products in a quote:

- Standard items
- Assemble to Order (ATO) and Pick to Order (PTO) model items
- Kit items

For model items, Quoting displays the availability information based on the availability of the model as well as its components. The components include mandatory as well as included items.

In addition, the availability information for an entire quote displays attributes such as estimated ship date, estimated group ship date (for models), estimated arrival date, shipping warehouse, shipping method, and so on.

Note: Availability information is not displayed for product items of type Service, Trade In, Container model, and components of a container model.

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 Availability To Promise (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.

To find out when the desired quantity of a product will become available, select Check Availability from the Actions LOV.

Information that is displayed as part of the availability check is explained below. Some of these fields are updateable.

Field Behavior

- Save checkbox

If this checkbox is selected and you click Apply, Quoting copies the values for the Requested Date, Warehouse, Shipping Method and Demand Class to the corresponding values in the Shipping Details form.

- Refresh

You can change the Requested Date, Warehouse, Shipping Method, or Demand Class and click this button to get the availability results based on the change.

- Requested Quantity
The requested quantity for the product.
- On Hand Quantity
The current quantity of the product existing in inventory for the ship from warehouse.
- Requested Date Type
The date the customer requests the products to be shipped from the warehouse or received at the Ship To location. The requested date is interpreted as the Requested Ship Date if the Requested Date Type attribute for the Quote To customer is Ship. The requested date is interpreted as the Requested Arrival Date if the Requested Date Type attribute for the Quote To Customer is Arrival.
- Requested Date
The requested ship date or requested arrival date. The date the customer requests the products to be shipped from the warehouse or received at the Ship To location.

The following sequence is used to determine the value that should be passed to the ATP engine to determine availability:
 1. Quote line level requested date
 2. Requested date for the implicit ship set containing the quote line (applies to model components)
 3. Requested date for the top model containing the quote line (applies to model components)
 4. Requested date in the quote's header
 5. Current System Date
- Warehouse
The warehouse from where the products will be shipped.

The value in this field is determined based on the following sequence:
 1. The ship from warehouse value in the quote line
 2. Ship from warehouse for the implicit ship set containing the quote line (applies to a model component)
 3. Ship from warehouse for the top model containing the quote line (applies to model components)

4. NULL, if the *ASO: Use Sourcing Rule* profile is set to *Yes*
 5. Value specified by the *ASO: Default Ship from Org* profile
- **Shipping Method**
The shipping method, for example, FedEx. The shipping method is determined based on the following sequence (most preferred to least preferred):
 1. Quote line level shipping method
 2. Shipping method for the implicit ship set containing the quote line (applies to model component)
 3. Shipping method for the top model containing the quote line (applies to model component)
 4. Quote header level shipping method
 5. NULL
 - **Demand Class**
Demand Classes allow you to segregate demand into user-defined groups. The LOV for Demand Class is based on the OM Demand Class lookup. Demand Classes are used to check product availability (ATP).
 - **Estimated Group Ship Date**
The estimated ship date when all of the requested lines that belong to the same ship set grouping on a quote line will be available for shipping.
 - **Estimated Ship Date**
The estimated ship date for a quote line.
 - **Estimated Arrival Date**
The estimated arrival date for a quote line to the destination. This date is arrived at based on the Shipping Method selected.
 - **Requested Date Quantity**
The quantity available on the requested ship/arrival date for this quote.
 - **Estimated Quantity Available**
The quantity available on the estimated ship date for a quote line.

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.

Manually Selecting a Warehouse

Prerequisites

- The profile option *ASO: Enable Manual Warehouse Selection* must be set to *Yes*.
- The quote must be saved.
- The line for which you want to select a warehouse must be selected.

To manually select the warehouse from where the current product will ship, select Shipping from the LOV in the Quote Lines tab.

Notes

- To save the warehouse designation for future ATP checks, ensure that the Save flag is selected. Future ATP checks for the line are performed against the selected warehouse.

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-in 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 region. 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* for more information.

Adding a Trade-in to the Current Quote

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*.

- The product total of the quote (excluding the trade-in) must exceed the value of the trade-in(s).

To enter a product as a trade-in, navigate to Quoting > Quote Lines

Method 1:

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.

Method 2:

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.

Adding a Trade-in From the Customer Install Base

Oracle Install Base has records of products purchased by customers from your organization. You can trade-in products by accessing the Install Base.

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*.
- The product total of the quote (excluding the trade-in) must exceed the value of the trade-in(s).

To add a trade-in from the customer Install Base to a quote, navigate to Quoting > Quote Lines > Trade In 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.
- 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 the profile *ASO: Display Installed Base Attributes* is set to *Yes*.

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.

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. All line attributes (price list, line level billing, line level shipping, line level payment details, line level attachments, and so on) are copied to the new lines.

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.

To split a line, select Split Line from the Actions LOV.

Field Behavior

- Total

Displays the summation of the Split Quantity values.

Entering Quote Tax Details

You can choose the tax handling and view other tax details for a quote. The Quote tax details are displayed in the Quote Header and Line Pricing details.

There are three tax options:

- Exempt — The current quote is exempt for a normally taxable customer site.
- Required — 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 Required 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

Note: If tax setup is based on Latin tax, the Tax Handling, Exempt Reason, and Exempt Number fields will be cleared and disabled.

To enter tax exemption information for a quote, navigate to Quoting > Quote Header tab > Tax

Field Behavior

- Exempt Number
This field is displayed if the tax method chosen is Exempt. You can select a pre-defined tax exemption certificate from the LOV or enter a new, unapproved exemption number certificate.
- Exempt Reason
This field is displayed if the tax method chosen is Exempt.

Refer the *Oracle E-Business Tax User Guide* and the *Oracle E-Business Tax Implementation Guide* for more details on setting up tax in the application.

Viewing Quote Tax Details

You can view tax details for each quote line.

Prerequisites

- The line for which you want to view tax details must be selected in the Quote Lines tab.

To view tax details, select Tax Details from the Actions LOV.

Viewing 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.

To view the versions of a quote, select the Quote Versions tab.

Notes

- You can view old versions of a quote by selecting View. Previous versions are displayed in read-only form in the Quoting UI.
- You can use Copy Quote on a previous version to make it the highest version of the quote. See Copying a Quote , page 28-7 for more information.

Using the Customer History Form to View Customer's 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 which became orders or contracts.

Since previous versions of Oracle Quoting did 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.

To view customer history, select the Customer History option from the Reports menu.

Notes

- Quotes tab

The tab lists all quotes for this customer. Each line lists quote, quote number, operating unit, account, 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.

- 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.

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.

To view the order history, select the Customer History option from the Reports menu. The Orders tab displays the order history.

Field Behavior

- View Quote

Highlight an order to view the order details and select View Quote to view the quote that preceded the order.

- View Order

Select to view the Order.

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, select the Agreement LOV in the Quote Header and Quote Lines tabs.

Notes

The price list and payment terms are defaulted based on the selected agreement.

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.

The Question component of the sales supplement template allows the following

response types:

- Currency
- Date
- Number
- Predefined
- Text
- Textbox
- File Attachment

Prerequisites

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

To enter Sales Supplement information, select Enter Sales Supplement from the Actions LOV.

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*.

- File Attachment

There are no restrictions on the type of attachment that you can upload to the supplement. However, attachments will not be printed when the quote is printed.

- Update

Click to modify the sections in the template.

- Remove

Click to remove this sales supplement template for the quote.

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 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.

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.

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

Change the order type for a quote from the Order Type LOV in the Quote Header tab.

Field Behavior

- Order Type

The value defaulted into this field is from the system parameter *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 chapter covers the following topics:

- Overview of Copying a Quote
- Copying a Quote

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.

<i>Copy Quote Behavior</i>		
	Copy to New Quote	Copy to New Version (Forms only)
Quote	Yes	Yes
Quote Number	No	Yes
Version Number	No	No
Opportunity	No	Yes
Contract Template	Yes	Yes

	Copy to New Quote	Copy to New Version (Forms only)
Contract Clauses and User Variables	No	Yes
Contract Acceptance Details	No	No
Contract Attachments (Supporting Document and Contract category documents)	Yes	Yes
Contracts Deviation Abstract	Yes	Yes
Expiration Date	No	Yes
Status	No	No
Published Flag	No	No
Sales Channel	Yes	Yes
Campaign	Yes	Yes
Primary Salesperson	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>)	Yes
Primary Sales Group	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>)	Yes
Order Number	No	N/A

	Copy to New Quote	Copy to New Version (Forms only)
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 and Line Levels	Yes	Yes
Payment and Tax Information at Header and Line Level	Yes	Yes
Regular Items, Configured Items, Service Items and their reference source, Quantity, and UOM	Yes	Yes
Manual Price Adjustments	Yes	Yes
Automatic Price Adjustments	Yes	Yes

	Copy to New Quote	Copy to New Version (Forms only)
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 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>)	Yes
Approval History	No	No

	Copy to New Quote	Copy to New Version (Forms only)
Sales Supplement	No	No
Pricing Updated On	No	No
Pricing Status	No	No
Tax Updated On	No	No
Tax Status	No	No
Automatic Pricing flag	See Table Behavior of Quote Pricing Flags when a Quote is Copied, page 28-5	See Table Behavior of Quote Pricing Flags when a Quote is Versioned, page 28-6
Automatic Tax flag	See Table Behavior of Quote Pricing Flags when a Quote is Copied, page 28-5	See Table Behavior of Quote Pricing Flags when a Quote is Versioned, page 28-6
Assistance Requested	No	Yes

Behavior of Quote Pricing Flags when a Quote is Copied

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Automatic Price Flags - Incomplete or Complete with a price affecting change pending	Complete	Complete
Automatic Price Flags - Complete indicator	Complete	Complete

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Automatic Price Flags - Incomplete while the quote is submitted for batch processing	Incomplete	Complete
Manual Price Flags - Incomplete or Complete with a price affecting change pending	Incomplete	Incomplete
Manual Price Flags - Complete	Complete	Incomplete
Manual Price Flag - Incomplete while the quote is submitted for batch processing	Incomplete	Incomplete

Behavior of Quote Pricing Flags when a Quote is Versioned

Source Quote - Current State	Source Quote - State after Copy	Destination Quote - State after Copy
Automatic Price Flags - Incomplete or Complete with a price affecting change pending	Complete	Complete
Automatic Price Flags - Complete indicator	Complete	Complete
Manual Price Flags - Incomplete or Complete with a price affecting change pending	Incomplete	Incomplete
Manual Price Flags - Complete	Complete	Incomplete

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.

Prerequisites

- The original quote must be displayed in the Oracle Quoting form.

To copy a quote, select Copy Quote from the Actions LOV.

Notes

- **New quote:** This option copies the quote information you selected 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 into a new version of the existing quote. You cannot create a new version of a quote if the status of the current quote is in Approval Pending or Order Submitted status.

Creating Proposals from Quotes

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. From Oracle Quoting, you can create proposals and view existing proposals for a quote.

Creating a Proposal

You can initiate the action to create a proposal from within Forms Quoting. However, the HTML UI of the Proposals page opens.

Prerequisites

- The quote is not expired
- The quote has not been submitted for a 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.

To create a proposal, select Proposals from the Actions LOV.

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

Initiating Approvals

This chapter covers the following topics:

- Overview of Approvals
- Initiating an Approval
- Viewing Approval Details
- Canceling the Approval Process
- Approving a Quote
- Rejecting an Approval

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.

Note: If approval rules are not defined, the user can self approve the quote. Instead of submitting the quote for approval, the user can click the **Approve Quote** button and the quote is approved.

Initiating an Approval

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

Prerequisites

- The Approvals subtab must be enabled using OA Personalization.

- 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.

To initiate an approval, select Approvals from the Actions LOV.

Notes

- You can choose to skip approvers if the profile *ASO: Allow Skip Approvers* is set to *Yes*.
- Successful approval submission is confirmed in a pop-up window. The quote is then Read-only and is in *Approval Pending* status.

Viewing Approval Details

Prerequisites

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

To view approval details, select Approvals from the Actions LOV.

Notes

- The Approvals form displays details about the approval process, including the approval status.

Canceling the Approval Process

You can cancel the approval process mid-way if required.

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.

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.

Prerequisites

- The profile *ASO: Enable Approvals* must be set to *Yes* at the appropriate level.
- You must have access to the operating unit in which the quote is created. If not, you cannot approve the quote.

To approve a quote, navigate to Self Service Applications > Workflow Administrator Web Applications > Worklist

Notes

- [Click Here For Quote Details](#)

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

Rejecting an Approval

Prerequisites

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

To reject an approval, navigate to Self Service Applications > Workflow Administrator Web Applications > Worklist

Negotiating Contract Terms on Quotes

This chapter covers the following topics:

- Overview of Sales Contracts
- Viewing Contract Details
- Authoring and Negotiating Contract Terms
- Associating a Contract Template to a Quote
- Changing Contract Templates
- Removing Terms
- Adding and Deleting Sections
- Updating Clauses
- Creating Non-Standard Clauses
- Creating a Non-Standard Clause from Standard Clauses
- Viewing the Deviations Report
- Moving Contract Terms
- Renumbering Contract Terms
- Resolving Alternate Clauses
- Checking for Clause Updates
- Entering and Updating Clause Variables
- Adding Unstructured Contract Terms
- Previewing Contract Terms
- Managing Contract Documents
- Viewing Contract Documents
- Adding Contract Documents
- Deleting Contract Documents

- Validation
- Printing Quotes with Contract Terms
- Order Submission with Contract Terms

Overview of Sales Contracts

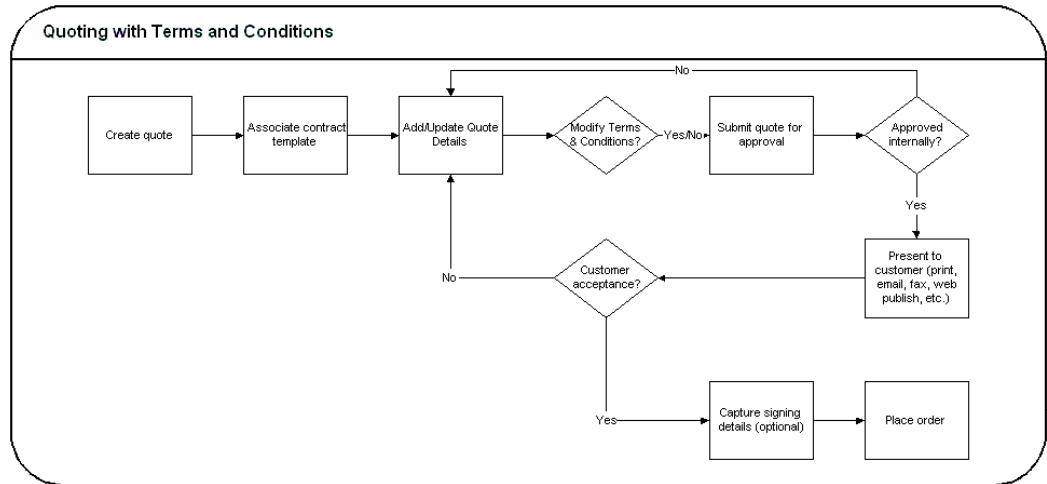
Important: It is strongly recommended that you implement Oracle Approvals if you plan to integrate with Oracle Sales Contracts and use the Contract Terms features. Use of the approvals process can help ensure that non-standard contract language receives additional approvals before the contract is presented 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 the 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 Sales 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. Refer the *Oracle Quoting Implementation Guide* for more details.

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

Viewing Contract Details

After selecting a quote to view, you can view contract details by selecting Contract Terms from the Actions LOV in the quote. 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

To view contract details, select Contract Terms from the Actions LOV.

Field Behavior

- Preview Terms

Selecting the **Preview Terms** button launches a new browser window with the

associated contract terms in PDF format. This option is available only if there is a contract template associated with the quote.

- **Update Terms**

Accesses the Contract Terms page. This field is 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*.

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 the 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 appropriate access level, depending on the 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 in the read-only status.
- 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 if:

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

An additional level of security, controlling the contract negotiation features that a user has access to, is covered in the Function Level Security section of the *Oracle Sales Contracts Implementation and Administration Guide*.

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. When you search for a contract template, results display all valid contract templates that are associated with the document type *Sales Quote*.

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.

To associate a contract template to a quote, select a value for the Contract Template field in the Quote Header tab.

Field Behavior

- Contract Template

A contract template is defaulted from the system parameter *Default Contract Template*.

Changing Contract Templates

You can change a contract template for 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.

When you search for contract templates, results display all valid contract templates that are associated with the document type *Sales Quote*.

Removing Terms

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

Notes

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

Adding and Deleting Sections

You can add sections to the contract and also delete them from the Contract Terms page.

Updating Clauses

To update clauses, select Contract Terms from the Actions LOV.

Field Behavior

- Make Non-Standard

To be able to make any changes to the terms, it should be made non-standard.

- Protect check box

If selected, you cannot update the clause.

- Add Variables

You can search and insert a variable, select a value for the variable, and insert it as text in the Clause Variables section.

Creating Non-Standard Clauses

Field Behavior

- Add Clause

Select either a section, sub-section, or clause and then click Add Clause to add a clause.

- Create Non-Standard Clause
Click to create your own clause.

Creating a Non-Standard Clause from Standard Clauses

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

Field Behavior

- Create Non-Standard Clause
Click to convert a standard clause to a non-standard one.
- Protect Text check box
If selected, you cannot update the clause.

Viewing the Deviations Report

Oracle Sales Contracts generates a Deviations Report that compares the text of two clauses when you have created a non-standard clause in a quote from a standard clause. The report highlights the additions, revisions, and removals of standard clauses on a contract template.

The Deviations Report displays the Standard sections or clauses that have been changed. Use the Compare Text feature to view the exact changes made.

Notes

- The Compare Text page displays a red line comparison of changes made to the clause text. Inserted text is underlined, deleted text is marked with a strike-through line.
- Changes to embedded variables within clause text are not compared on a quote. Variable tags are compared, not variable values.

Moving Contract Terms

Notes

- After moving the section or clause, you will need to manually renumber the contract terms. Refer to Renumbering Contract Terms, page 31-7 for more information.

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 Sales Contracts Implementation and Administration Guide*.

Notes

- 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.

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.

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.

Notes

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

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 Sales Contracts Implementation and Administration Guide*.

Adding Unstructured Contract Terms

You can modify a structured contract term or upload a newly authored document as Contract Terms for the quote. To modify the structured contract terms, you can

download the existing structured terms to a file (Rich Text Format or Microsoft Word 2003 format), make the required modifications, and upload the document back into the quote. This document is now considered the Contract Terms for the quote. Alternatively, you can also upload a newly authored document (of any file type) as the Contract Terms, with or without a Contract Template being associated it.

A quote is considered to have contract terms if the Contract Source displays Structured Terms or Attached Document.

Modifying Existing Structured Contract Terms

If the quote has structured contract terms associated with it, the Contract Source is displayed as Structured Terms. If you want to modify the existing terms, download it first, modify the terms as required, and upload the document back. The Contract Source remains Structured Terms.

Notes

- Select the Download Contract option from the Actions list.
- Lock the contract to prevent another user from modifying it till you download the structured contract term.
- Select Unlock Contract from the Actions list when you are ready to upload the modified contract terms.
- Select Upload Contract from the Actions list to upload the modified terms.
- Select Structured Terms from the New Contract Source list when you upload the modified contract terms.
- You can retain the structured terms for reporting purposes by selecting the Enable Structured Terms for Reporting check box.

Uploading a New Document as Contract Terms

If the quote has structured contract terms associated with it, the Contract Source is displayed as Structured Terms. If you do not want the existing terms, you can upload a completely new document that will be the new terms. The Contract Source now displays Attached Document.

Notes

- Select Upload Contract from the Actions list to upload the new document.
- Select Attached Document from the New Contract Source list when you upload the new terms.
- You can retain the structured terms for reporting purposes by selecting the Enable Structured Terms for Reporting check box.

Previewing Contract Terms

You can preview the contract terms attached to the quote. The preview is generated in a PDF format.

If the contract terms on the quote is unstructured, i.e the Contract Source is Attached Document, the preview is generated only if the following conditions are satisfied:

- The attachment exists and it is the Primary Contract Document
- The document Category is Contract
- The Authoring Party is Internal
- The document is in .rtf format.
- The Oracle Contract version information is embedded within the document.

If the document is in any other format, Quoting opens the document using the application that the document is associated with.

If the Oracle Contract version information is not available, the contract terms cannot be previewed.

Managing Contract Documents

Contract documents are files manually attached to a quote that represent or are 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.

Viewing Contract Documents

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.

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.

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.

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 Sales Contracts Implementation and Administration Guide*.

Notes

- 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.

Printing Quotes with Contract Terms

To print quotes containing contract terms, you use the Oracle XML Publisher printing solution.

The Oracle XML Publisher printing solution provides the ability to generate a printable PDF or RTF document that can be formatted according to 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*. Quotes printed using XML Publisher can be either in PDF or RTF 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.

If the contract terms on the quote are unstructured, i.e. the Contract Source is Attached Document, the attachment is merged into the printed quote if the following conditions are satisfied:

- The attachment exists and is the Primary Contract Document
- The Category of the Contract Term is Contract
- The Authoring Party is Internal
- The attachment is in .rtf format
- The attachment is generated from within the Oracle E-Business Suite.

If any of the above conditions are not satisfied, the printed quote is generated without any terms and conditions.

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.

Prerequisites

- The profile *OKC: Enable Sales Contracts* must be set to *Yes* at the appropriate level.
- A layout template (stylesheet) must be registered with XML Publisher Template Manager and specified in the profile option *ASO: Default Layout Template*.

To print a quote with contract terms, select Print Quote from the Actions LOV.

Notes

- If there are validation issues, a page may display warnings.
- Depending on your browser setting, either a browser window opens displaying the print out 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.

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 covers the following topics:

- Overview of Security
- Adding a Resource to the Quote Sales Team
- Changing the Primary Salesperson

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. It 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 system parameter *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.

Quote Access Security

Quote Access Security takes place in three levels:

- Operating Unit Security
- Based on the value set for the profile *ASO: Enable Security Check*, quote access is also restricted based on:
 - Quote Availability Security
 - Quote Data Security

Operating Unit Security

The Multiple Organization Access Control feature enables users to access one or more 'Operating Units' within one user responsibility. A flexible security profile *MO: Security Profile* controls the access of one responsibility to multiple operating units. The security profile will permit access to one, multiple or all Operating Units in the system.

- Users may be given access to one or more operating units, with one of the operating units marked as the default. The user can access quotes between operating units seamlessly and does not have to switch between responsibilities.
- Users must select the operating unit at the time of creating the quote or quote

template. This cannot be changed once the quote or quote template is saved.

- Search results display quotes from all operating units that the user has access to.

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

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 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 that 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.

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 the 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 the 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 the profile option *ASO: Create New Customer* controls a user's ability to create new customer information. This functionality ensures that users 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 the profile option *ASO: Update Customer* controls a user's ability to update existing customer information.
- **Update sales team information** — The value of the 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 the profile options *ASO: Modify Sales Credits* and *ASO: View Sales Credits* determine if users can modify and/or view 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 user is a manager:

- 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

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.

- 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.

New Quote Security

New Quote Security restricts the parties for which a sales agent can create quotes. New Quote Security is governed by the profiles *ASO: New Quote Security* and *ASN: Customer Access Privilege*. If the profile *ASO: New Quote Security* is set to *Yes*, you 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 *ASN: Customer Access Privilege* 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.

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 *Do Not Reassign* flag is supported in this release only if automatic sales team assignment is enabled.

Prerequisites

- The profile *ASO: Update Sales Team* must be set to *Yes* or *Partial* at the appropriate level.

To add a resource, select Sales Team from the Actions LOV.

Field Behavior

- Primary Salesperson

The Primary Salesperson is automatically populated in this form. Refer to the Primary Salesperson , page 32-2section 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.

Changing the Primary Salesperson

Prerequisites

- The profile *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.

You can change the primary salesperson for a quote from the Salesperson field in the Quote Header.

Assigning Sales Teams and Allocating Sales Credits

This chapter covers the following topics:

- Overview of Sales Team Assignments
- Assigning a Sales Team Using Territory Manager
- Overview of Sales Credit Allocation
- Overview of Projected Commission
- Performing an Automatic Sales Credit Allocation
- Performing a Manual Sales Credit Allocation
- Removing a Sales Credit Receiver
- Viewing Sales Credits
- Viewing Projected Commission Calculations for a Quote

Overview of Sales Team Assignments

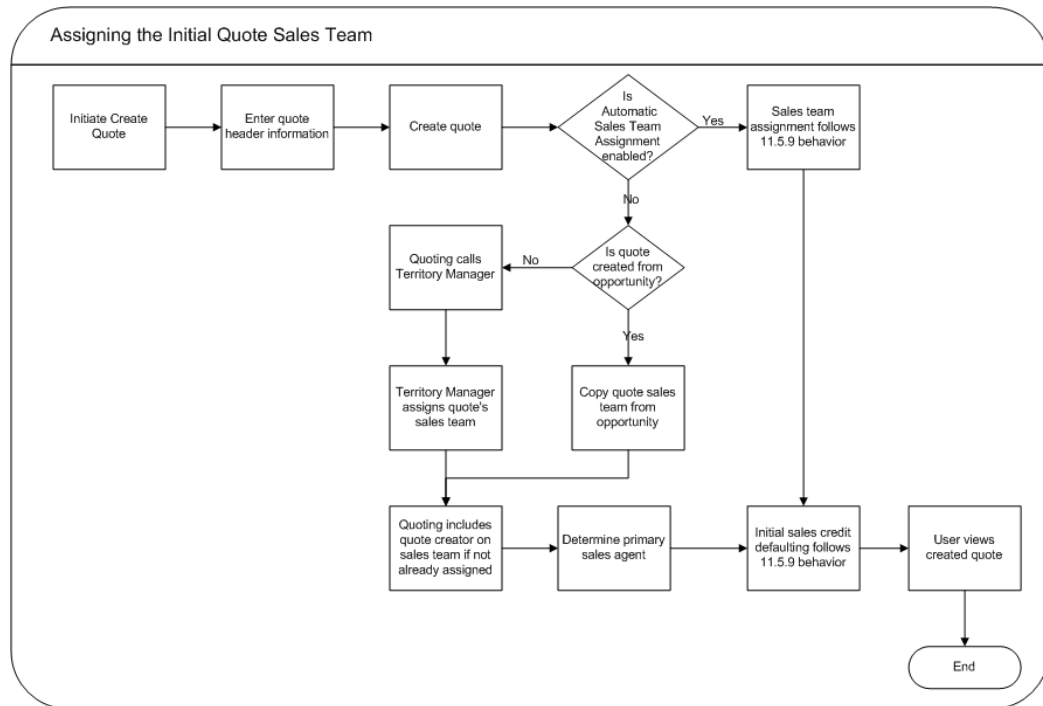
Integration with Oracle Territory Manager allows Quoting to ensure that the correct resources can access a quote. This integration is controlled by the profile option *ASO: Automatic Sales Team Assignment*. If set to *Partial*, Quoting calls Territory Manager to assign quotes sales teams at quote creation,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

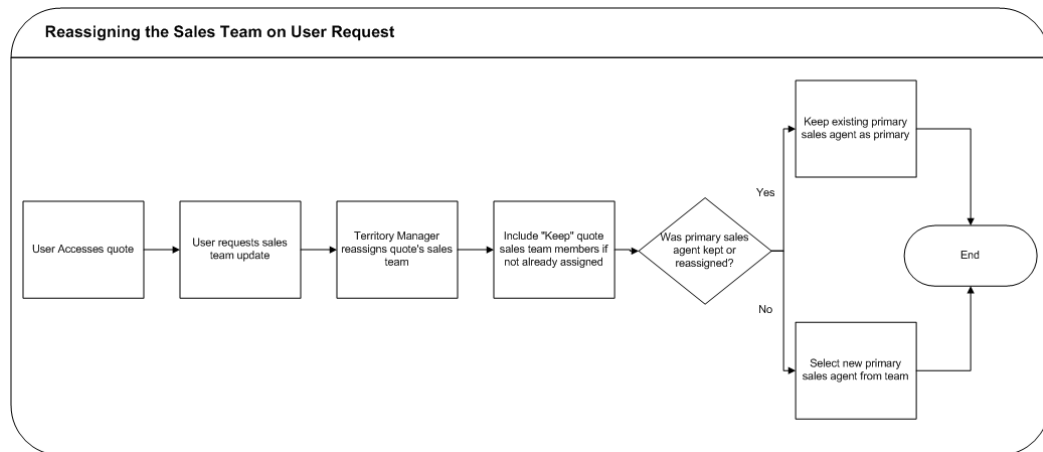
Sales teams and territories are set up in Oracle Territory Manager. You can use Territory Manager's account-based and geography-based territories, or you can specify a territory

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 *Do not Reassign* 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.

Assign Territory Access Concurrent Program

This program updates the Quoting sales teams based on any territory changes made in Oracle Territory Manager. Users with the Sales Administrator responsibility can schedule to run the concurrent program.

Do Not Reassign Flag

The Do Not Reassign flag indicates whether a resource will be preserved on the sales team during sales team assignment. Any resource without the Do Not Reassign 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 Do Not Reassign 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 *Default Salesrep* system parameter. 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 the *Default Salesrep* system parameter.

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 *Overview of Sales Team Assignments*, page 33-1 for more information.

Prerequisites

- The profile *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.

To manually call Territory Manager for sales team assignment, select Sales Team from the Actions LOV.

Notes

- When you click Reassign Team, 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.

Overview of Sales Credit Allocation

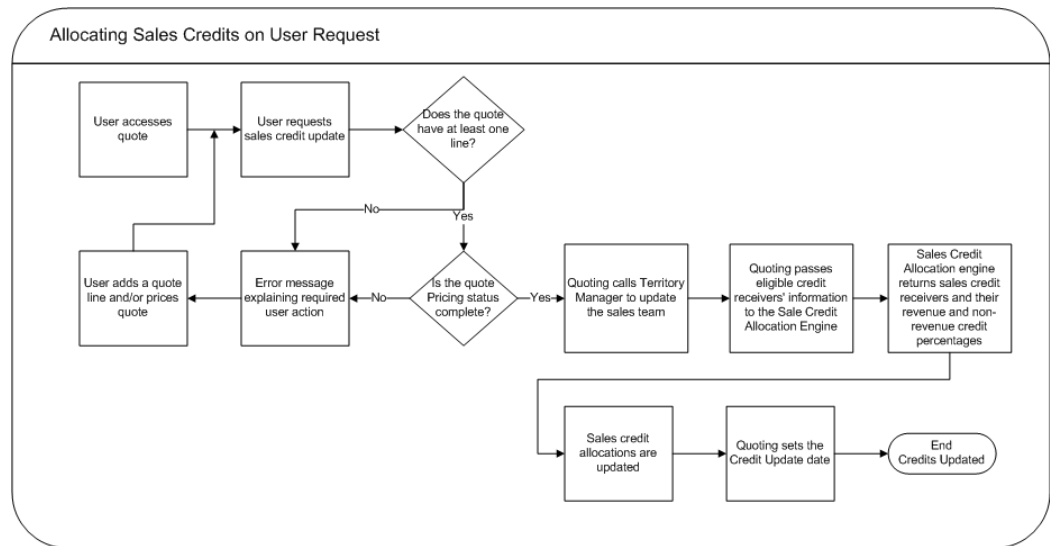
Through integration with Oracle Incentive Compensation (OIC) or another sales credit allocation engine, you can automatically determine sales credit allocations for quotes. After updating the sales team using Oracle Territory Manager, Quoting will pass the sales representatives and their roles to the 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*, respectively.

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 levels. 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 you are using the OIC sales credit allocation engine and it 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 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.

Overview of Projected Commission

Note: You cannot use projected commission functionality unless sales team assignment and sales credit allocation are enabled. The profiles *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

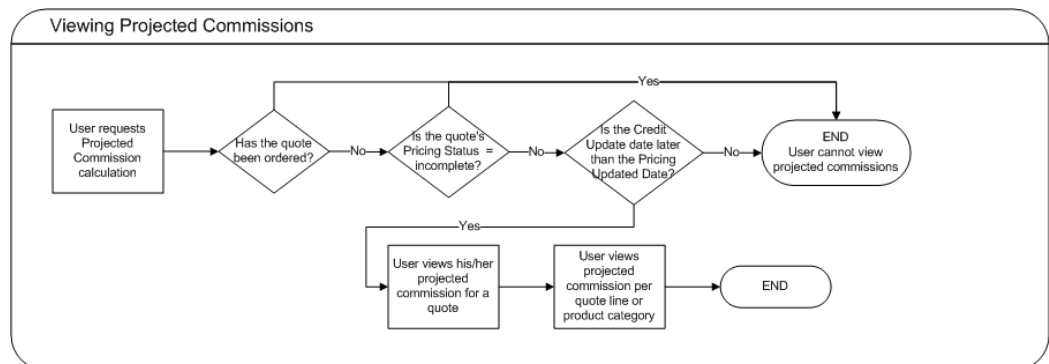
- Each quote line
- Each product category

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.

Performing an Automatic Sales Credit Allocation

Prerequisites

- The profile *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, the profile *ASO: Run Sales Credit Update for Quote Lines* must be set to *Yes*.
- The user has update access and the quote is updateable.

To perform a sales credit allocation, select Automatic Sales Credit Update from the Actions LOV.

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.

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 must be the current group's manager). Otherwise sales credits are read-only.

To perform a manual sales credit allocation, select Assign Sales Credits from the Actions LOV.

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.
- 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 the profiles *OTS: Default Group* and *OTS: Default User Role*, and *ASO: Default Salesgroup*.

Removing a Sales Credit Receiver

To remove a sales credit receiver, select Assign Sales Credits from the Actions LOV.

Notes

- When a sales representative is removed, the sales representative credits are removed and the Revenue and Non-Revenue totals are recalculated.
- 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.

Viewing Sales Credits

Prerequisites

- Either the profile *ASO: Modify Sales Credits* must be set to *No* or *ASO: Modify Sales Credits* must be set to *Partial* AND the user should not be a manager in the current

sales group.

To view sales credits for a quote, select View Sales Credits from the Actions LOV.

Viewing Projected Commission Calculations for a Quote

Prerequisites

- The profile *ASO: Calculate Projected Commission* is set to *Yes*.
- The profile *ASO: Automatic Sales Credit Allocation* is set to *Full* or *Partial*.
- The profile *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's Pricing Status is *Complete*.
- The Sales Credit Update Date is later than the Pricing Update Date.

To view projected commission for a quote, select View Commission from the Actions LOV.

Notes

- 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 and Attachments

This chapter covers the following topics:

- Overview of Notes and Attachments
- Viewing and Adding Notes to a Quote
- Creating an Attachment
- Deleting an Attachment
- Copying an Attachment from Another Quote

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.

Viewing and Adding Notes to 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.

To add notes to a quote, select View Notes from the Actions LOV.

Field Behavior

- Summary tab

Displays the date created, enter by user ID, note type 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.
- **Related To**
You can relate the note to any object as well as to the active quote. The note can have multiple relations.

Notes

- You will not 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, the user has to explicitly query to see those Notes. To view these notes without explicitly executing a query in Quoting UI, you can apply patch number 4462883 (R12.CAC.A). See *OracleMetalink* for more information.

Creating an Attachment

You can create attachments at the header or line level.

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.

To create an attachment for a quote, select the Attachments icon from the toolbar in the Quoting form.

Field Behavior

- **Paper Clip Icon**
Opens the Attachments form.
- **Category**

The Category controls which applications can access the attachment. The default category is **Miscellaneous**, as this category is viewable from all applications with attachments enabled.

- 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.

- 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.

- Web Page

If the Data Type is Web Page, you must enter a source in the Source tab.

For more information on attachments, refer to the *Oracle Applications User's Guide*.

Deleting an Attachment

When you delete an attachment, you remove the association between the attached document and the 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.

Copying 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.

To copy an attachment from another quote, navigate to Quoting > Attachments > Document Catalog

Printing and Publishing

This chapter covers the following topics:

- Overview of Printing
- Printing a Quote
- Overview of Publishing Quotes
- Web Publishing a Quote
- Unpublishing a Quote

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 Quote function uses HTML 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 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, e-mail 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 Signature block section is added if the quote is executable.

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 XML Publisher to produce the Print Quote report.

Printing 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.

To print a quote, select Print Quote from the Actions LOV.

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

Output formats can either be PDF or Rich Text Format (RTF).

- 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.

- Print in Executable Mode

If checked, the quote is printed along with a signature section.

- Template

For the XML Publisher printing option, the seeded default template is derived from the system parameter *Default Contract Template*.

- Show Header Attachments

This field can be enabled/disabled using OA Personalization.

If selected, all header level Text type attachments in the Miscellaneous document category will print.

- Show Line Attachments

This field can be enabled/disabled using OA Personalization.

If selected, 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.

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.
- *ASO: Enable Web Publishing* is set to *Yes*.
- If the Quote To customer is of type **Organization**, a Quote To contact has been specified.
- The quote is not expired.
- 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**.

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.

Web Publishing 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.

To web publish a quote, select Web Publish from the Actions LOV. The Web Publish function uses HTML Quoting.

Notes

- If the customer is not an FND_USER, you will be prompted to create a user with a valid e-mail address. You must also choose a preferred language for the user. A Welcome to Store e-mail notification is sent to the customer.
- If the customer is an FND_USER, you can submit the quote for web publishing directly. The Web Publish Quote e-mail notifications are sent to the customer and to you.
- You have the option not to web publish the quote after creating the user.
- 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. If the customer has access to restricted Store minisites, these are listed as well. You can choose to publish the quote in restricted minisites as well as public access minisites.

Unpublishing a 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.

To unpublish a previously published quote, select Web Unpublish from the Actions LOV.

Placing Orders

This chapter covers the following topics:

- Overview of Placing Orders
- Placing an Order

Overview of Placing Orders

When you place an order in Oracle Quoting, the quote becomes an order using Oracle Order Management.

Placing 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 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**.

To place an order from the quote, click **Place Order**.

Notes

- Your order is submitted to Oracle Order Management and you receive a

confirmation number. You can then track the order in Order Management.

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 responsibility 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.

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

A type of BOM Model that you import from Oracle Bills of Material into Oracle Configurator Developer to create configuration models containing connectivity and trackable components. Configurations created from Container Models can be tracked and updated in Oracle Install Base. Also called Network Container Model.

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.

demand class

Demand classes allow you to segregate demand into user-defined groups.

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, page Glossary-5.

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 be filled in order to move to the next field or

form.

opportunity

An opportunity is created in Oracle 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. Quotes can be created from opportunities 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.

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, page Glossary-7, non-revenue sales credit, page Glossary-5.

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, page Glossary-5.

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* 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

A Forms-based 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.

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