**Oracle® Quoting**

Implementation Guide

Release 12.1

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Oracle Quoting Implementation Guide, Release 12.1

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**Oracle Quoting Implementation Guide, Release 12.1**

**Part No. E13462-07**

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# Preface

## Intended Audience

Welcome to Release 12.1 of the *Oracle Quoting Implementation Guide.*

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

- The principles and customary practices of your business area.

- **Oracle Quoting**

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

- **Oracle Applications Framework**

  To learn more about the Oracle Applications Framework, see the *OA Personalization Framework and OA Extensibility Framework Guide*.

- **The Oracle Applications graphical user interface**

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

See Related Information Sources on page xii for more Oracle E-Business Suite product information.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

## Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

## Structure

# 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 Oracle 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.

## Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite

Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

# Guides Related to All Products

## Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

# Guides Related to This Product

## Oracle Advanced Pricing Implementation Manual

This guide show you how to define pricing rules that service the pricing requirements of Oracle applications. Pricing rules control the pricing actions that are applied to customer transactions such as price lists, price agreements, formulas, and modifiers. With Oracle Advanced Pricing, you can attach qualifiers to a price list that enables an item have more than one price list. You can also set up block pricing, promotional limits, multiple currency conversion, and multiple contexts per sales order.

## Oracle Advanced Pricing User's Guide

Oracle Advanced Pricing calculates prices including promotional prices for Oracle Order Management and other Oracle Applications based on pricing rules, pricing relationships, item hierarchies, usage brackets, and deals and promotions.

### Oracle Content Manager Implementation and Administration Guide

Oracle Content Manager ensures accurate and consistent content across applications by providing a central repository for storing and managing content. Oracle Content Manager integrates with Oracle E-Business Suite to enable the seamless transition of content between applications. This integration facilitates single user sign-on to associate content such as product images, white papers, and newsletters with E-Business objects such as store sections, inventory products, and marketing campaigns.

### Oracle Incentive Compensation Implementation Guide

This guide shows you how to set up and control the way in which your organization compensates its sales force, field sales personnel and partners for selling and retaining customers. You can define rules for collection, calculation, credit allocation, payment, and projected compensation.

### Oracle Incentive Compensation User Guide

Oracle Incentive Compensation helps enterprises calculate and pay compensation to their sales forces, vendors, suppliers, and partners. You can also calculate nonmonetary commission, such as points. With Oracle Incentive Compensation, you can create compensation plans that align with your business strategy and assign them. You can also align quota targets with corporate revenue, volume, and profit targets.

### Oracle Leads Management Implementation and Administration Guide

Oracle Leads Management enables you to capture, evaluate, and distribute the leads generated by marketing activities for sales follow-up. It provides solutions to automate and optimize prospect-to-sales conversion across the enterprise.

### Oracle Marketing Encyclopedia System Concepts and Procedures

Oracle Marketing Encyclopedia System (MES) is a content repository management component of the CRM suite of applications that allows you to create, publish, and manage marketing and sales content. Based on your access level and privileges you can organize content in a hierarchy of channels for storage and distribution.

### Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

### Oracle Partner Management Implementation and Administration Guide

Oracle Partner Management enables vendors to recruit and motivate partners to sell

products. You can implement partner dashboards for partners to manage their activities and channel manager dashboards for vendors to manage and monitor partner activities and performance. You can also create partner profiles, set up partner activities, and create partner programs to help train partners and provide incentives and benefits.

### Oracle Partner Management Partner User Guide

This guide describes how partners can use the partner dashboard to enroll in programs, access the vendor library, manage membership and renewals, register deals, submit referrals, request marketing funds, and view the status of claims.

### Oracle Partner Management Vendor User Guide

This guide describes how vendors can use the Channel Manager dashboard to manage channel partners, partner activities and programs, partner profiles, and partner performance. Partner activities include training and managing funds, opportunities, referral compensation, and deals.

### Oracle Proposals Implementation Guide

Oracle Proposals enables sales representatives to generate proposals in the field from templates created and published by sales administrators. This guide describes how to set up different proposal users, and install and integrate with the applications that you need to create and maintain proposals such as Oracle Sales, Oracle Telesales, Oracle Quoting, Oracle Marketing, Oracle Content Manager, and Oracle Trading Community Architecture.

### Oracle Proposals User Guide

Oracle Proposals enables you to create templates and use them to create proposals to help position a product or service as a solution to the customer's business needs. You send proposals by email, including supporting documents, to prospective customers. This guide describes how to create templates of different categories and use these to create proposals from a lead in Oracle Sales, an opportunity in Oracle Telesales or Oracle Sales, or a customer in Oracle Telesales. You can also associate a proposal to a campaign activity in Oracle Marketing.

### Oracle Quoting User Guide

Oracle Quoting enables you to create and manage customer quotes across all sales and interaction channels and if approved by the customer, convert these quotes into orders. This guide describes how to create and modify quote templates, add and configure simple and related products, manage pricing and pricing adjustments, determine customer credit worthiness, and perform real-time global product availability checks.

### Oracle Sales Contracts Implementation and Administration Guide

Oracle Sales Contracts enhances the ability of sales organizations to manage their

contracts by adding sophisticated contract management and compliance features to quoting, ordering, and negotiating long-term agreements. You can use the Contract Expert to define rules for creating contracts and reporting policy deviations. This guide describes how to establish contract standards, author and negotiate contracts, and approve, sign, and manage them.

## Oracle Sales for Handhelds Implementation Guide

This guide describes how to set up Data Quality Management to manage customers, set appointment preferences of timezone and categories, and map appointment, task, and contact on your handheld device with Oracle eBusiness Suite. You can implement clients to synchronize your handheld with Oracle Sales and Microsoft Desktop Outlook and subscribe to Short Message Service alerts.

## Oracle Sales for Handhelds User Guide

Oracle Sales for Handhelds enables traveling sales professionals to access enterprise information from their pocket PC, Blackberry, palm-based devices, and Nokia using an HTML browser. You can use Outlook for your appointments, view emails received in outlook from contacts as Oracle Sales interaction history, and receive Short Message Service alerts for service contract expiry, escalated service requests, and invoice overdue. You can manage customers, contacts, and customer visits using your handheld.

## Oracle Sales Offline Implementation Guide

Oracle Sales Offline enables you to remotely manage your sales efforts without logging in every time to Oracle Sales. You can use the template provided by Oracle Sales Offline to download and upload sales information without the need to install additional software. To implement this, you must have first installed Oracle Sales, Oracle Quoting, and Oracle Web Applications Desktop Integrator. You must also configure timezones and timezone conversions.

## Oracle Sales Offline User Guide

Oracle Sales Offline is a mobile sales application that uses templates to enable sales representatives remotely manage their day-to-day sales activities. You do not have to log into Oracles Sales to download and upload the template and template data. Oracle Sales Offline works with Oracle Sales and with Oracle TeleSales to create a virtual sales team that enables the sharing of opportunities, contacts, notes, and other customer information between sales team members. You can use Oracle Sales Offline to manage leads and opportunities, build forecasts from opportunities, manage customers, maintain and develop customer quotes, and create and manage assigned tasks.

## Oracle Sales Implementation Guide

This guide enables you to set up users, user groups, and roles, define forecast categories that group products and services to be included in a forecast, set up and enable

currency conversion, and set up the sales dashboard linking the sales funnel to sales stages of a sales methodology. You can also set up Oracle Sales and Oracle Telesales interoperabiliy and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Trade Management, Oracle Partner Management, and Oracle Incentive Compensation.

## Oracle Sales User Guide

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

## Oracle TeleSales Implementation Guide

This guide describes how you can set up Oracle TeleSales so telesales agents can convert a sales inquiry or a customer call into an order. You must set up agent and customer interaction tracking, enable web directory assistance for agents, enable web collaboration, set up opportunity forecasting so agents enter forecast amounts for a product line and receive sales credits, and set up marketing source codes to track the marketing activity responsible for a sale or a sales activity. Oracle TeleSales interacts with Oracle Scripting, Oracle Email Center, Oracle Marketing, Oracle Territory Manager, Oracle Product Lifecycle Management, Oracle One-to-One Fulfillment, Oracle Universal Work Queue, Oracle Sales, and Oracle Quoting.

## Oracle TeleSales User Guide

Oracle TeleSales enables telesales agents manage the sales cycle, from prospects to booked orders. It offers a multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Its E-Business Center offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view. You can use Oracle TeleSales for comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment.

## Oracle Territory Manager Implementation Guide

With Oracle Territory Manager, you can create geographic territories, account territories, and sales territories using predefined matching attributes to identify territories such as the geographic matching attribute of country. You can also create territory hierarchies to make the territory assignments and searches more efficient. Before you implement Oracle Territory Manager, you must define the purpose of defining territories for your business, the level of usage that the resources assigned to territories may require, and the requirement for overlays.

### Oracle Territory Manager User Guide

Oracle Territory Manager enables you to distribute sales and after sales tasks by geographical location, account, task priority, and resource skills. Oracle Sales, Oracle Field Service, Oracle Service Contracts, Oracle Collections, Oracle Partner Manager, and Oracle Trade Management all use Oracle Territory Manager to define ownership of transactions.

### Oracle Channel Revenue Management Implementation and Administration Guide

Channel Revenue Management enables users to efficiently plan, promote, execute, and manage the order to cash process for improved sales and return on investment (ROI), and reduced loss in revenue. Use this guide to learn about the different products in the Oracle Channel Revenue Management Suite and the other Oracle E-Business Suite products with which this product family integrates. You can learn how to set up users, customers, and suppliers, and perform the basic configurations that will be used by all the products in this suite.

### Oracle Channel Rebate and Point-of-Sale Management User Guide

Oracle Channel Rebate and Point of Sales Management enables suppliers to manage their product inventory and prices, create budgets for customer and partner rebates, offers, and incentives, and enlist the help of channel partners such as distributors and retailers to manage execution of these offers at the points of sale in the channel. This guide describes how to use the Account Manager Dashboard to manage products and price lists, create and manage budgets, quotas, and offers, and plan and manage customer accounts.

## Installation and System Administration

### Maintaining Oracle E-Business Suite Documentation Set

This documentation set provides maintenance and patching information for the Oracle E-Business Suite DBA. *Oracle E-Business Suite Maintenance Procedures* provides a description of the strategies, related tasks, and troubleshooting activities that will help ensure the continued smooth running of an Oracle E-Business Suite system. *Oracle E-Business Suite Maintenance Utilities* describes the Oracle E-Business Suite utilities that are supplied with Oracle E-Business Suite and used to maintain the application file system and database. It also provides a detailed description of the numerous options available to meet specific operational requirements. *Oracle E-Business Suite Patching Procedures* explains how to patch an Oracle E-Business Suite system, covering the key concepts and strategies. Also included are recommendations for optimizing typical patching operations and reducing downtime.

### Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of

your Oracle E-Business Suite data.

## Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

## Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

## Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

## Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

## Oracle E-Business Suite System Administrator's Guide Documentation Set

This documentation set provides planning and reference information for the Oracle E-Business Suite System Administrator. *Oracle E-Business Suite System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle E-Business Suite System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle E-Business Suite System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

### Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

## Other Implementation Documentation

### Oracle Applications Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operation units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

### Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

### Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

### Oracle E-Business Suite Flexfields Guide

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

### Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented

architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

### Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

### Oracle e-Commerce Gateway Implementation Manual

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

### Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

### Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

### Oracle Product Lifecycle Management Implementation Guide

This guide describes how you can define hierarchies of items using structure types, catalogs, and catalog categories, and define change categories and configure them for revised items or request lines. Oracle Product Lifecycle Management provides several predefined catalogs such as the Product Catalog, Asset Catalog, and the Service Catalog and predefined change categories such as change orders and ideas. Use this guide to learn how to define additional catalogs for browsing and reporting purposes and new change categories specific to your business needs. You can then learn how to set up users and responsibilities that provide or restrict access to these catalogs, catalog items, and change management objects.

### Oracle Product Lifecycle Management User Guide

This guide describes how to create and manage catalogs, create and maintain product attributes and attribute values, and manage item statuses and lifecycle phases. You can

learn how to create change categories, create task templates for change orders, and create change management reports. In addition, you can use this guide to create roles, map roles to privileges, and maintain these roles.

## Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

## Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

## Oracle Workflow Developer's Guide

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

## Oracle Workflow User's Guide

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

## Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

## Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT

transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

### Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

## Training and Support

### Training

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

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

### Support

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

## Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

# 1

# Introduction

This chapter covers the following topics:

- Oracle Quoting Overview
- Oracle Quoting Key Features

## Oracle Quoting Overview

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

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

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

## 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 create a quote template from a quote

- Ability to apply one or more quote templates at the time of quote creation

- Ability to apply a quote template from any operating unit. The operating unit can be different or same as the quote's operating unit.

- Ability to simultaneously update multiple quote lines

- Ability to update quote detail from search results

- Ability to validate model configurations

- Ability to change customer for a quote when you update or copy a quote

- Support the TCA SmartMatch functionality to avoid the creation of duplicate customers and contacts

- Access sales assistance comments from customers

- Ability to perform a QA check

**Forms UI Only**
- Folder technology for customizing columns

# 2

## Verify Mandatory Dependencies

This chapter covers the following topics:

- Oracle Quoting Mandatory Dependencies
- Setting up Oracle Receivables
- Setting up Tax Locations
- Setting up Oracle Advanced Pricing
- Setting up Oracle General Ledger
- Setting up Oracle Inventory
- Setting up Invoiceable Items
- Setting up Oracle Order Management
- Oracle Quoting Optional Integrations
- How to Verify Specific Set Ups for Dependencies

## Oracle Quoting Mandatory Dependencies

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

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

- **Oracle Receivables** — Provides tax information and customer account information. Refer to the *Oracle Receivables User Guide*, *Oracle Receivables Tax Manual*, and the *Oracle Trading Community Architecture User Guide* for complete setup information.

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

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

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

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

- **Oracle Order Management** — Allows creation of orders from quotes. Refer to the *Oracle Order Management Suite Implementation Manual* for complete setup information.

- **Oracle XML Publisher** — Allows quote printouts to be produced using XDO (XML/XSL) technology. This is mandatory to print quotes.

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

## Setting up 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.

Please refer the *Oracle Receivables User Guide* for details on setting up payment terms.

## Setting up Tax Locations

You can set up valid tax locations in Oracle Receivables. Failure to set up state and tax account combinations can result in errors.

**Notes**

- Login to Oracle Forms as a Receivables Manager. Navigate to Setup > Tax > Locations

- Refer the *Oracle Receivables User Guide* for defining tax locations and rates.

## Setting up Oracle Advanced Pricing

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

- Price Lists — Every product you want to sell must be on a price list. In Oracle

Advanced Pricing, you set up price lists, add inventory items to them, and modify them as needed.

- Modifiers — Modifiers enable you to set up price adjustments, such as discounts and surcharges, and freight and special charges. *Promotion* is an example of a modifier.

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

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

## Terms Substitution Modifiers

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

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

- If there are multiple terms substitution modifiers of the same type with a designated precedence, Oracle Pricing passes one modifier, which Oracle Quoting applies to the quote.

## Attributes

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

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

## Attributes Supported by Oracle Quoting

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

*Attributes Supported by Oracle Quoting*

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

| Context | Attribute Name | Pricing Level | Pricing or Qualifier Attribute |
|---|---|---|---|
| Item | Segment 3 | Line | Pricing |
| Item | Segment 4 | Line | Pricing |
| Item | Segment 5 | Line | Pricing |
| Item | Segment 6 | Line | Pricing |
| Item | Segment 7 | Line | Pricing |
| Item | Segment 8 | Line | Pricing |
| Item | Segment 9 | Line | Pricing |
| Item | Segment 10 | Line | Pricing |
| Item | Segment 11 | Line | Pricing |
| Item | Segment 12 | Line | Pricing |
| Item | Segment 13 | Line | Pricing |
| Item | Segment 14 | Line | Pricing |
| Item | Segment 15 | Line | Pricing |
| Item | Segment 16 | Line | Pricing |
| Item | Segment 17 | Line | Pricing |
| Item | Segment 18 | Line | Pricing |
| Item | Segment 19 | Line | Pricing |
| Item | Segment 20 | Line | Pricing |
| Line Volume | Item Amount | Line | Pricing |
| Line Volume | Item Quantity | Line | Pricing |

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

| Context | Attribute Name | Pricing Level | Pricing or Qualifier Attribute |
|---------|----------------|---------------|-------------------------------|
| Territory | Territory | Line/Header | Qualifier |
| Volume | Line Volume | Line | Qualifier |
| Volume | Line Weight | Line | Qualifier |
| Volume | Order Amount | Header | Qualifier |
| Volume | Order Qty | Line | Qualifier |

## Setting up Oracle General Ledger

When setting up Oracle General Ledger, you must define:

- A chart of accounts with a value set, and Accounting Flexfield Structure as well as segments and segment values

- A calendar

- Currencies (enable currencies to use them)

- A set of books

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

## Setting up Oracle Inventory

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

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

- The current date must be within the start and end date range set for the product, if any.

- The product must be valid for the inventory organization of the operating unit in which the quote is created.

- The product must be in the default category set defined for the functional area

"Order Management". This condition is not applied for related items that are filtered on the basis of an existing item relationship with the selected product.

- The product must have the "Customer Orders Enabled" flag enabled.

- The "Returnable" flag must be enabled if the Line Category Code is Return.

- The BOM Item Type must be *Model* or *Standard*.

- The Primary UOM is not *ENR*.

  - Please note that if Oracle *inter*Media is enabled and you add new products to your Inventory, these products will not show up in the Quoting UI until you run the *i*Store Search Insert concurrent program. See Running *i*Store Search Insert, page 4-27 for more information.

  - In Oracle Quoting HTML, only *inter*Media product searches are supported.

# Setting up Invoiceable Items

The *invoiceable_item_flag* and *invoice_enabled_flag* system attributes in Advanced Product Catalog must be set to **Yes** to enable invoicing items in a quote.

# Setting up Oracle Order Management

Perform the following setups in Oracle Order Management:

## Setting up the Default Item Validation Organization

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

## Setting up Shipping Methods

Oracle Quoting and Oracle Order Management treat shipping method modifier types differently.

> **Important:** Select only one modifier type when setting up an Oracle Quoting shipping method in Oracle Order Management.

### Credit Card Authorization and Risk Management

Using Oracle Payments functionality in the background, Oracle Order Management manages the processing of the credit card authorization and risk management validation when an order is placed.

### Assign Workflow to the Transaction Type Selected in the Default Order Type Quoting parameter

Use the following guidelines to assign workflows for the transaction type you select in the *Default Order Type* Quoting parameter.

**Prerequisite**

You must have a transaction type set up.

1. Login to Oracle Forms as Oracle Order Management Super User.

2. Navigate to Setup > Transaction Types > Define.

3. Query for the value in the Quoting parameter *Default Order Type*.

## Oracle Quoting Optional Integrations

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

- **Oracle Advanced Planning and Scheduling** — Provides Availability to Promise (ATP) information. Refer to the *Oracle Advanced Planning Implementation and User's Guide* for more information.

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

- **Oracle Configurator** — Configures model items. Refer to the *Oracle Configurator Installation Guide* and *Oracle Configurator Implementation Guide* for complete setup information.

- **Oracle *i*Store**— 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 Incentive Compensation** — Calculates sales credit allocations for quotes and determines sales representatives' projected commission. Refer to the *Oracle Incentive Compensation Implementation Guide* for setup information.

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

- **Oracle 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 Sales Contracts** — Enables users to include standard and non-standard contract terms on a quote. Refer to the *Oracle Sales Contracts Implementation and Administration Guide* for more information.

- **Oracle Sales** — Allows sales representatives to create quotes in a campaign-to-order business flow from the HTML UI. Refer to the *Oracle Sales Implementation Guide* for complete setup information.

- **Oracle TeleSales** — Allows sales representatives to create quotes in a campaign-to-order business flow from the Forms UI. Refer to the *Oracle TeleSales Implementation Guide* for complete setup information.

- **Oracle Service Contracts** — Provides contract details for service items. Refer to the *Oracle Contracts for Service Implementation Guide* for complete setup information.

- **Oracle Territory Manager** — Assigns sales teams to quotes based on sales territory definitions. Refer to the *Oracle Territory Manager Implementation Guide* for complete setup information.

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

# How to Verify Specific Set Ups for Dependencies

Refer to the *Oracle CRM Application Foundation Implementation Verification Checklist* to ensure that all dependencies are installed, implemented, and set up correctly. This document is available on Oracle *MetaLink*.

# 3

# Implementation Overview

This chapter covers the following topics:

- Oracle Quoting Implementation Overview
- Process Description
- Implementation Task Sequence

## Oracle Quoting Implementation Overview

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

- Process Description, page 3-1

- Implementation Task Sequence, page 3-2

## Process Description

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

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

- Set up quote statuses

- Set system profile options

- Set Quoting parameters

- Set up *inter*Media Search (for HTML UI)

For enhanced functionality, set up the following:

- Security

- Multi-Org Access Control

- Web publishing

- Sales supplement templates

- Approvals

- Sales Contracts

- Credit Checking

- Sales Team Assignments

- Sales Credit Allocation

- Projected Commission

> **Note:** If you are implementing Oracle Quoting in a multi-org environment, please refer to the *Oracle Applications Multiple Organizations Implementation Guide*.

## Implementation Task Sequence

The following table describes the implementation process for Oracle Quoting.

*Oracle Quoting Process*

| Step | Description | Mandatory | Responsibility |
|------|-------------|-----------|----------------|
| 1 | Set up quote status and quote status transitions.<br><br>Define new or modify seeded quote statuses, status transitions, and extensibility rules based on business needs. | Mandatory | Quoting Sales Manager |
| 2 | Set up system profile options.<br><br>Define system profile values. These affect the way Oracle Quoting looks and performs. | Mandatory | System Administrator |

| Step | Description | Mandatory | Responsibility |
|------|-------------|-----------|----------------|
| 3 | Set up Quoting parameters. | Mandatory | HRMS Manager |
| 4 | Set up *inter*Media Search. | Mandatory for Quoting HTML | *i*Store Concurrent Programs<br><br>System Administrator |
| 5 | Assign a seeded or customized Oracle Quoting responsibility to user. | Mandatory | System Administrator |
| 6 | Set up default expiration date using one of the available methods. | Mandatory | System Administrator |
| 7 | Set up Quote Defaulting Rules | Optional | Quoting Sales Manager |
| 8 | Set up Multi-Org Access Control | Optional | HRMS Manager |
| 9 | Modifying seeded lookup types<br><br>Some seeded lookups types are extensible and can be modified. | Optional | Quoting Sales Manager<br><br>Application Developer |
| 10 | Set up overrideable modifiers in Oracle Advanced Pricing if *ASO: Discounting Privilege* is set to *Full*. | Mandatory if using manual discounts or surcharges | Pricing Manager |
| 11 | Set up other modifiers in Advanced Pricing | Optional | Pricing Manager |
| 12 | Set up multi-currency price lists | Optional | Pricing Manager |
| 13 | Personalize the User Interface (HTML) | Optional | Quoting User |

| Step | Description | Mandatory | Responsibility |
|------|-------------|-----------|----------------|
| 14 | Personalize the User Interface (Forms) using folder functionality | Optional | Quoting Sales Agent Quoting Sales Manager |
| 15 | Set up Security Set security-specific profile options, and create resources and groups. | Mandatory if using Security | System Administrator CRM Administrator |
| 16 | Set up sales team assignment, sales credit allocation, and projected commission. Set up territories and credit rules, and create a ruleset of type *Projected Classification*. | Optional | CRM Administrator Incentive Compensation Super User |
| 17 | Set up print quote using XML Publisher To have personalized print quote reports, customize the XSL stylesheet using XML Publisher. This is mandatory to print contract terms. | Optional | XML Publisher Administrator (for XDO) |
| 18 | Set up Manual Pricing Request options. | Optional | System Administrator |
| 19 | Set up Account Creation requirements | Optional | System Administrator |
| 20 | Set up for Validating Model Configurations | Optional | Quoting User, System Administrator |
| 21 | Set up Proposals | Optional | Oracle Proposals Administrator |
| 22 | Set up Web Publishing functionality Set specific profiles and set up specialty stores in *i*Store. | Mandatory to publish quotes | System Administrator *i*Store Administrator |

| Step | Description | Mandatory | Responsibility |
|------|-------------|-----------|----------------|
| 23 | Set up Approvals<br><br>To enable approvals, set specific profile options and conditions and rules. | Mandatory for approvals | System Administrator<br><br>AME (Approvals Management Engine) Administrator |
| 24 | Set up Sales Contracts<br><br>To enable sales contracts, set specific profile options and set up clauses and contract templates in the Contract Terms library. | Mandatory to include sales contracts with quotes | System Administrator<br><br>Contracts Administrator |
| 25 | Set up Credit Check functionality<br><br>To enable credit check, set specific profile options. | Optional | Order Management Super User (for credit check rules)<br><br>System Administrator |
| 26 | Set up QA Check | Optional | System Administrator<br><br>Workflow Administrator Web Applications |
| 27 | Set up Sales Supplement functionality<br><br>Use this functionality if you require supplemental information on quotes that will not pass into Oracle Order Management. Enable sales supplement functionality in Oracle Forms and view it in the HTML UI. | Optional | Quoting Sales Manager |
| 28 | Create additional attachments document categories.<br><br>Oracle Quoting supports one document category. You can create additional document categories as needed. | Optional | Application Developer |

| Step | Description | Mandatory | Responsibility |
|------|-------------|-----------|----------------|
| 29 | Define descriptive flexfields.<br><br>Customizable, user defined fields on the Oracle Quoting form that the application developer can define as needed. | Optional | Application Developer |

# 4

## Implementation Tasks for Oracle Quoting

This chapter covers the following topics:

- Setting Up Quote Status and Quote Status Transitions
- Rules for Quote Status Changes
- Setting System Profile Options
- Assigning a Seeded Oracle Quoting Responsibility to a User
- Modifying Seeded Lookup Types
- Setting Up TCA SmartMatch
- Setting Up Quoting Parameters
- Setting up the Default Expiration Date
- Creating a Quote Template from a Quote
- Applying Quote Template with Different or Same Operating Unit as the Quote's Operating Unit
- Setting up Overrideable Modifiers
- Multi-Currency Price Lists
- Promotional Goods
- Setting up Security
- Enabling View Margin
- Creating a Resource
- Setting Up Manager Roles
- Setting up a Group
- Verify Group Setup
- Setting Up Sales Team Assignment and Sales Credit Allocation
- Automatic Sales Credit Allocation — External Engine

- Setting Up Security Code for Credit Card Payments

- Setting Up the Print Quote Functionality

- Setting Up Print Quote

- Product Categories

- Setting up Manual Pricing and Tax Calculation Request Options

- Enabling interMedia Search

- Running iStore Search Insert

- Refreshing the Search Index

- Setting Up Account Creation Requirements for Quotes

- Changing Quote To Customer for a Quote

- Setting Up Validations for Model Configurations

- Quoting Integration with Oracle Proposals

- Setting up Web Publishing Functionality

- Setting up Approvals

- Setting up Availability to Promise (ATP)

- Setting up Sales Contracts

- Setting Up Credit Check Functionality

- Internal Credit Check

- Defining Credit Check Rules

- External Credit Check

- Implementing User Hooks

- Setting up QA Check

- Purging Quotes

- Setting up Sales Supplement Templates

- Creating Additional Attachments Document Categories

- Defining Descriptive Flexfield Information

- Specifying Flexfields

- Notes from Opportunities

- Tasks From Opportunities (HTML only)

- Enabling Oracle Quoting Features with OA Personalization (HTML Only)

- Using Folder Functionality to Customize Forms

- Verify the Implementation

# Setting Up Quote Status and Quote Status Transitions

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

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

- Modify tasks and notes

- Change the quote status, as long as the transition is valid

- Publish or unpublish a quote, if publishing is enabled and the quote satisfies publishing criteria

- Modify payment information, prior to submission of order

- Add and remove attachments; you cannot replace existing attachments

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

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

- The application administrator cannot remove the status from the system.

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

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

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

The following table lists the seeded quote statuses.

*Seeded Quote Statuses*

| Quote Status | Description | Read-only |
|---|---|---|
| Approval Canceled | Sales representative canceled the approval process. | No |
| Approval Pending | Quote is pending approval, and is read-only. | Yes |
| Approval Rejected | Approval was rejected by the approvers. | No |
| Approved | Approved by the necessary approvers. | Yes |
| Draft | The default initial status of the quote. | No |
| Inactive | No more activity allowed on the quote. | Yes |
| Order Submitted | Quote has been submitted as an order to Oracle Order Management. | Yes |
| Store Draft | For *i*Store internal use only. Allows *i*Store to have a Draft to Order flow that is separate from Quoting. | No |

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

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

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

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

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

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

## Rules for Quote Status Changes

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

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

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

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

*Seeded Quote Status Transitions*

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

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

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

- User — Displays USER if a transition to that state can be done from either the user interface or application. For example, you can change the status using a LOV, Quoting automatically populates this field with USER, if you create a new status transition.

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

You cannot create new transitions to the following statuses:

- Approval Canceled

- Approval Rejected

- Approved

- Store Draft

You cannot create new transitions from the following statuses:

- Approval Pending

- Order Submitted

- Store Draft

To set up quote statuses, log in to Oracle Forms as a Quoting Sales Manager and navigate to the Quote Status Setup window from Oracle Quoting > Setup > Quote Status.

**Field Behavior**

- **Code** This is the internal name and is not seen by the user.

- 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 create a new version when the user selects the save icon for a quote in the main Quoting form, check the Auto Versioning box for the new status.

- **Allowed Transition to Status region** You can allow transitions to multiple statuses.

# Setting System Profile Options

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

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

**Notes**

- Log in to Oracle Forms as a Systems Administrator, and navigate to Profile > System > Find System Profile Values window.

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

# Assigning a Seeded Oracle Quoting Responsibility to a User

The following Oracle Quoting seeded responsibilities are available:

**Access to Forms Quoting**

- Quoting Sales Agent

- Quoting Sales Manager

  This responsibility also gives access to Quoting Setups.

- Quoting User

> **Note:** To create your own responsibilities, assign the menu
> QOT_QUOTE_ROOT to the responsibility.

To assign the Quoting HTML seeded responsibility (Quoting User) to a user:

**Prerequisites**

The user must be set up as an application user.

**Notes**

- Login to Oracle Forms as a System Administrator, and navigate to Security > User > Define.

- Choose a responsibility for the user from the Responsibility LOV.

# Modifying Seeded Lookup Types

To modify the seeded Lookup Types (QuickCodes), login to Oracle Forms as Quoting Sales Manager.

Navigate to Quoting > Setup > Quick Codes.

For a complete list of the seeded lookup types in Oracle Quoting, refer to Appendix D, "Seeded Lookup Types", page D-1.

# Setting Up TCA SmartMatch

The TCA SmartMatch functionality uses powerful fuzzy matching logic and scoring to identify the most appropriate customer and contact records during the search process and identifies duplicates during the creation process.

Data Quality Management (DQM) is another name for the fuzzy matching logic. DQM uses matching rules set up in TCA to search for and match parties. There are a few profiles that are assigned these match rules and accordingly, the appropriate rules are used to perform the search.

In order for Quoting to use DQM, the following profiles must be set.

- HZ: Default Party Type

- HZ: Enable DQM Party Search

- HZ: Match Rule for Organization Simple Search

- HZ: Match Rule for Organization Advanced Search

- HZ: Match Rule for Organization Duplicate Prevention

- HZ: Match Rule for Person Simple Search

- HZ: Match Rule for Person Advanced Search

- HZ: Match Rule for Person Duplicate Prevention

If the profile *ASO: Enforce Account Relationships* is set to *No*, DQM is used by Oracle Quoting to search for:

- Quote To Customer and End Customer

- Quote To, Bill To, Ship To End Customer contact

- Bill To and Ship To Customer

For more information about setting these profiles, please refer the *Oracle Sales Implementation Guide*.

For information on Data Quality Management, see the *Oracle Trading Community Architecture Administration Guide*.

# Setting Up Quoting Parameters

The operating unit-specific profiles have been obsoleted and are replaced by the corresponding Operating Unit-specific parameters. Use the following procedure to set up the following Quoting parameters. See the Obsoleted Profiles , page A-41 section to view the profiles.

- Default Order Type

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

- Default Salesrep

  Provides a default sales representative on the quote, if the logged-in user is not a valid sales representative. If you are integrating with Oracle Territory Manager, setting this parameter is mandatory.

- Default Sales Group

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

- Default Sales Role

Determines the initial role assignment for the primary salesperson defaulted from the *Default Salesrep* Quoting parameter. Valid values are all roles for the resource selected in the *Default Salesrep* parameter, of role type Sales, TeleSales, and Partners Relationship Management.

If this parameter has no specified value, Quoting will use the first role found for the resource.

- Default Contract Template

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

**Steps**

1. Login to Oracle Forms with the HRMS Manager responsibility.

2. Navigate to HRMS Manager : Work Structures : Organization > Description

3. In the Find Organization dialog box, specify the operating unit for which you want to set the parameters in the Name field.

4. For Organization Classification Name, select Operating Unit.

5. Click **Find**.

6. From the Organization Classifications section, select Operating Unit.

   Ensure that the Enabled checkbox is selected.

7. Click **Others**.

8. From the Additional Organization Information dialog box, select Quoting Parameters.

9. Click inside the Quoting Parameters field to display the Quoting Parameters dialog box with the following fields:

   - Operating Unit

     Select the same Operating Unit that you selected in Step 3 above.

   - Default Order Type

   - Default Salesrep

   - Default Sales Group

   - Default Sales Role

   - Default Contract Template

10. Specify a value for each of the parameters using the respective LOVs.

   The LOVs for the Default Order Type, Default Salesrep, and Default Contract Template are filtered by the selected operating unit. The LOVs for the Default Sales Group and Default Sales Role are based on the Default Salesrep parameter.

11. Click **OK** to save your changes.

You must perform the above procedure to set the Quoting parameters for each operating unit in your organization.

# Setting up the Default Expiration Date

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

At the end of a calendar period, e.g., quarter or month

OR

At the end of a fixed number of days

## Expiration Date Based on Calendar Period

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

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

The General Ledger period is controlled by the profile option *ASO: Default Expiration GL Period Type*. Available options include all period types set up for the selected GL calendar. For more information on these profile options, see Appendix A, "Oracle Quoting Profile Options", page A-1.

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

## Expiration Date Based on a Fixed Number of Days

Alternatively, you can set the default quote expiration date so that quotes expire after a fixed number of days. The fixed number of days defaults from the profile option *ASO: Quote Duration*. For more information, see Appendix A, "Profiles in Oracle Quoting", page A-1.

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

## Creating a Quote Template from a Quote

You can create a quote template from a quote enabling the quote to be reused.

The following quote line attributes are copied from a quote to the quote template:

- Product

- Quantity

- UOM

- Period, duration, and start date only for service products

The set up steps are as follows:

1. User must have access to the Setup: Template Administrator function.

2. You must enable the Create Template action for the ASO: Quote Actions in HTML UI lookup type.

## Applying Quote Template with Different or Same Operating Unit as the Quote's Operating Unit

You can search for and apply templates with different or same operating unit as the quote's operating unit. Set the value of the ASO: Filter Quote Template By profile option appropriately when applying a template with an operating unit to a quote.

## Setting up Overrideable Modifiers

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

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

### Manual Modifiers in Buckets

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

In the HTML UI, manual adjustments are entered in the Discount % field, when the user overwrites the Selling Price or Total Adjustment %. Bucket numbers are displayed so that sales representatives can see the buckets before applying manual modifiers.

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

## Multi-Currency Price Lists

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

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

The use of multi-currency price lists is controlled by the profile option *QP: Multi-Currency Installed*. If this profile is set to *Yes* and the profile *QP: Multi-Currency Usages* is set to *Yes* at the Application or Responsibility level, Quoting shows all price lists with the selected currency as base currency, as well as all price lists where there is a conversion list for the selected currency. If the profile option is set to *No*, the Price List LOV displays only price lists that are valid for the selected currency. You can leave the Currency field blank to view all price lists, or leave the Price List field blank to view all currencies. See Oracle Pricing Profile Options, page A-41 or the *Oracle Advanced Pricing Implementation Manual* for more information.

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

With multi-currency price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing

mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

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



### Price List and Currency LOV Behavior (Multi-Currency enabled)
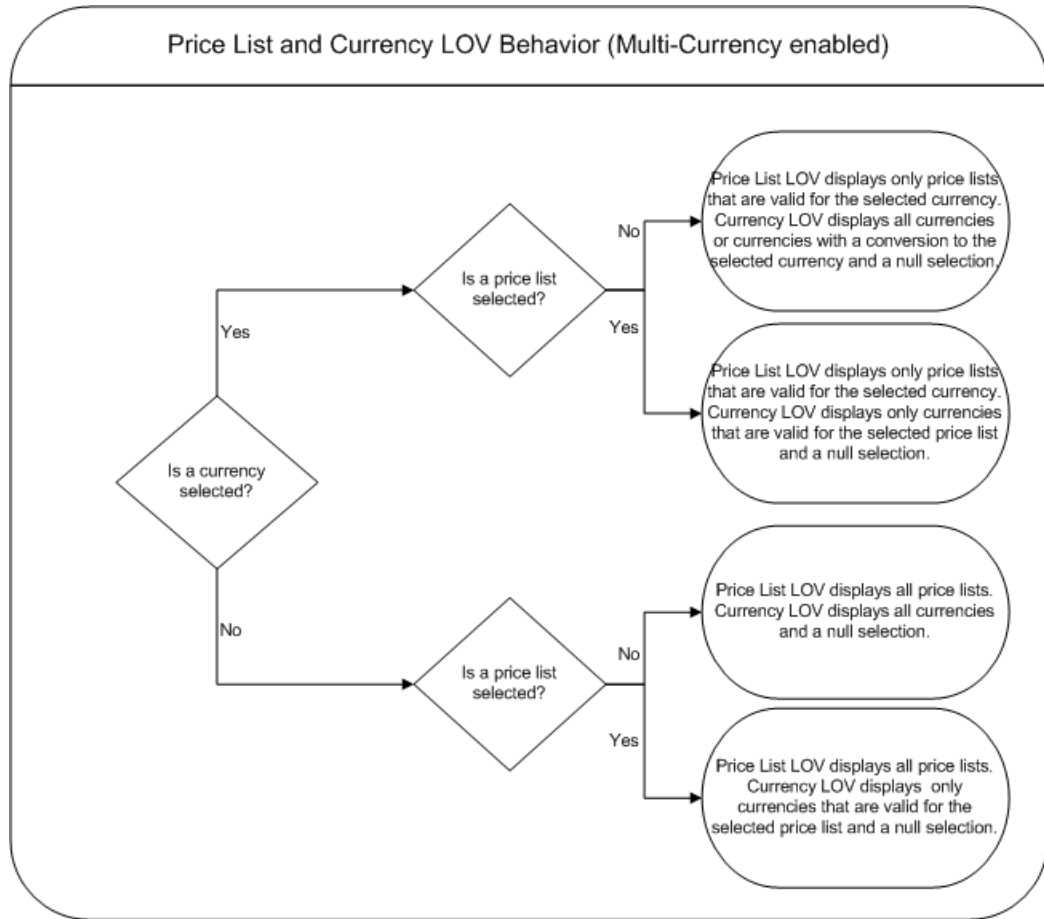
Additionally, in the Forms UI, if *ASO: Price List Override* is set to *No*, and there is no currency selected, the Price List LOV is read only and the Currency LOV displays only currencies that are valid for the selected price list. If *ASO: Price List Override* is set to *No*, and a currency is selected, 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:

Price List and Currency LOV Behavior (Multi-Currency disabled)
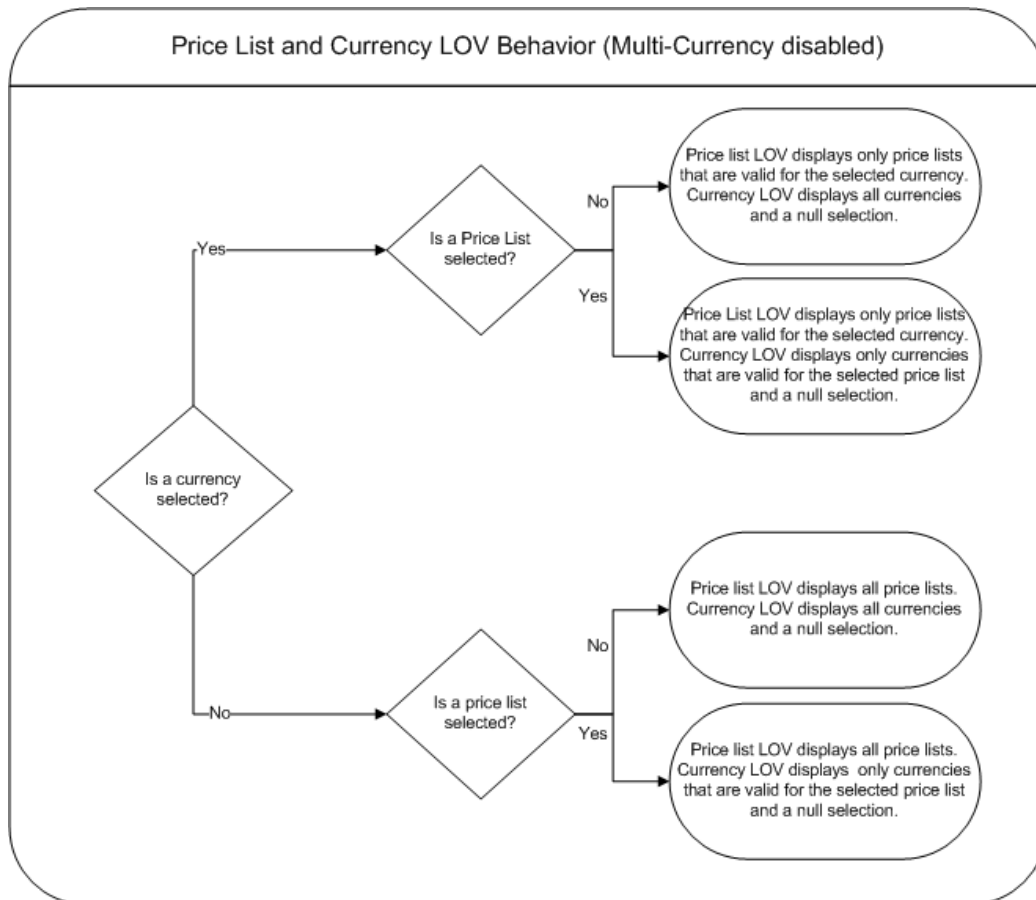
The *ASO: Price List Override* profile is not applicable in the HTML UI. Instead, you can achieve the same functionality in the HTML UI by enabling/disabling the Price List and Currency LOVs using OA Personalization.

## Setting Up a Multi-currency Price List

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

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

# Promotional Goods

You can set up a modifier in Advanced Pricing that automatically adds a product to a

quote if the qualifying conditions (the purchase of one or more product) are met. The product or promotional good is added to the quote as a free or discounted item.

> **Note:** You must set up a qualifier for the promotional good modifier such that only lines of type Order qualify for the promotional good.

The following set up restrictions apply to promotional goods:

- A promotional good cannot be a service

- A promotional good cannot have a service attached to it.

- A promotional good cannot be a configuration component.

- A promotional good cannot be restricted based on setting up promotional limits.

- The qualifying product for a promotional good cannot be a service and have a service reference to the promotional good.

- If using promotional goods, the profile option *IBE: Calculate Price* should be set to *No*. Otherwise, repricing could cause unintended consequences.

- Line level modifiers will be applied to the promotional good line only if defined in a pricing phase with the Freeze Override flag enabled.

- Promotional good modifier discounts cannot be applied to model subcomponents.

- Pricing attributes cannot be used to derive the list price of a 'free' good.

- In the Get Product List for a promotional good modifier line, the price list's currency must match the modifier currency.

- Items set up as promotional goods should be eligible for addition to the quote.

# Setting up Security

To enable security in Oracle Quoting, you must set the security profile options, listed in Appendix A, "Profiles in Oracle Quoting", page A-1.

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

To view examples of how quoting security can be implemented, see Appendix C, "Oracle Quoting Security Scenarios", page C-1.

> **Note:** Selecting a group for the Primary Sales Agent determines where quote information shows up in Daily Business Close. For example, a sales representative is part of Sales Group 1 and Sales Group 2. If you

want the sales representative's statistics to roll up to Group Manager 1, you must select Sales Group 1 as the Primary Sales Agent's sales group for that representative.

## Enabling View Margin

The View Margin function is used to determine if the user can view cost and margin information. It also enables the user to refresh the cost and margin information in the quote.

## Creating a Resource

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

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

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

For information on creating a resource, refer to the *Oracle Trading Community Architecture User Guide*.

## Setting Up Manager Roles

Oracle Quoting security uses roles to determine which resources are managers. A manager must have an active role, of any role type, with the Manager flag checked. In addition, a manager must have the appropriate role in the context of a group. Managers have access to all quotes for the sales team they belong to. You can also set up a manager to have access to all quotes for the sales teams to which their subordinates belong.

Table Role Type Example, page 4-17 lists the users, roles, roles attributes, and role types for employees at a fictional company.

*Role Type Example*

| User | Role | Role Attribute | Role Type |
|------|------|----------------|-----------|
| Bob Jones | Regional Sales Manager | Manager | Sales |

| User | Role | Role Attribute | Role Type |
|------|------|----------------|-----------|
| Jane Adams | District Sales Manager | Manager | Sales |
| John Franklin | Sales Agent | Member | Sales |
| Jennifer Moore | Sales Agent | Member | Sales |

For complete instructions on setting up roles, refer to the *Oracle Trading Community Architecture User Guide* .

# Setting up a Group

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

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

The following diagram demonstrates how the information in Table Role Type Example, page 4-17 is used to infer a hierarchy in Oracle Quoting.
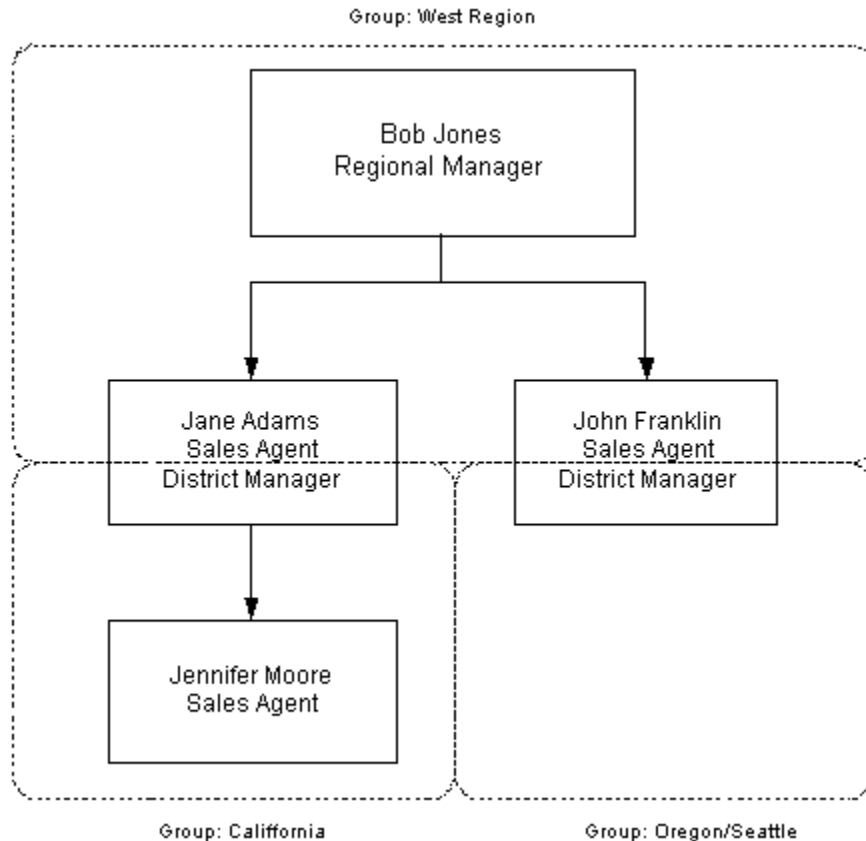
**Notes**

- Login to Oracle Forms with the Resource Manager responsibility, and navigate to Resources Manager > Maintain Resources > Groups.

- If you are defining group hierarchies, set up the Parent group first. For information on setting up groups, see the *Oracle Trading Community Architecture User Guide*.

- Select Sales and TeleSales as the applications in the Used In tab.

## Verify Group Setup

To verify that you have set up your groups correctly, login to Oracle Forms with the Resource Manager responsibility.

Navigate to Resource Manager > Maintain Resources > Group Hierarchy.

## Setting Up Sales Team Assignment and Sales Credit Allocation

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

- Customer

- Geography

- Product

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

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

For information on setting up sales team assignment functionality, refer to the "Integrating Oracle Quoting With Oracle Territory Manager", page 10-1 chapter.

For information on setting up sales credit allocation functionality using Oracle Incentive Compensation, refer to the "Integrating Oracle Quoting With Oracle Incentive Compensation", page 9-1 chapter.

If you implemented automatic sales team assignment and automatic sales credit allocation, you can also set up Quoting and Incentive Compensation to calculate projected commission for quotes.

## Automatic Sales Credit Allocation — External Engine

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

For information on implementing user hooks, see Implementing User Hooks, page 4-34 .

For information on sales credit allocation using Oracle Incentive Compensation, see the Integrating Oracle Quoting With Oracle Incentive Compensation, page 9-1 chapter.

## Setting Up Security Code for Credit Card Payments

The Security Code field may be specified on the quote when the Payment Type is Credit Card. The Security Code is the three-digit number printed, but not raised, on the back of a credit card. It is also known as the CVV2/CVC2 code. Refer the *Oracle Payments Implementation Guide* for more details.

## Setting Up the Print Quote Functionality

You can print quotes using Oracle XML Publisher, XDO in either Adobe PDF or

Microsoft RTF format.

For more information on Print Quote profile options, refer to Profile Options for Printing, page A-22.

# Setting Up Print Quote

The layout of the printout will be dictated by a customizable RTF Template, specified in the profile option *ASO: Default Layout Template*. All quotes printed using XML Publisher can either be in the Adobe PDF or the Microsoft RTF format. The *ASO: Default Layout Template* profile also governs the **Preview Terms** format.

> **Note:** The Customizable RTF template used for print layout includes an XSL-FO template for Printing Contract Terms and Conditions.

### Setup Steps for Oracle XML Publisher:

Perform the following steps to set up Print Quote to function properly:

1. Upload the RTF template and the XSL included/sub-template using the XML Publisher Administrator responsibility. Refer the Customizing the XML Publisher Report, page 4-21 for more information.

2. Set the profile option *ASO: Default Layout Template* to the value corresponding to a valid RTF template name that you uploaded.

3. Bounce the Apache Server.

### Customizing the XML Publisher Report:

Customizing the XML Publisher report involves changing the RTF template to meet your requirements. To customize the RTF Template:

1. Customize the report title.

   Two customizable FND messages are registered for the print quote report, one for non-executable quotes and one for executable quotes. The message names are:

   • ASO_PQUOTE_EXEC_TITLE

   • ASO_PQUOTE_NONEXEC_TITLE

2. Customize the disclaimer.

   If a quote is non-executable, you can customize the disclaimer printed on the bottom of the quote by changing the name of the ASO_PQUOTE_DISCLAIMER message.

> **Note:** The disclaimer text should not be more than 4 lines long. If more than 4 lines, the disclaimer will be truncated.

3. Replace the default logo given at the top left corner of the header region in the RTF template with your logo (.gif image file).

4. Modify any section in the RTF template body by creating or changing tables and placeholders.

### Customizing the Quote Data Template:

To customize data templates, log in to Self Service Applications with the XML Publisher Administrator responsibility.

Navigate to Home and then Data Definitions.

1. Select Order Capture in the Application field and click Go.

2. Select Quote Data Template.

3. In the Files section, click the data template file (ASOPRTDT.xml) link to download the file.

4. Save the ASOPRTDT.xml file on your local drive.

5. Add the custom columns to be added in the respective query section of the ASOPRTDT.xml file.

6. Define the custom columns in the Data Structure section of the respective group of the ASOPRTDT.xml file and save the changes.

7. Click Update File. Provide the path to the modified ASOPRTDT.xml file and click Apply.

8. Bounce the Apache Server.

9. ASOPRTDT.xml can be modified and should not be renamed to custom file name.

### Customizing the Quote Printout Template:

To customize data templates, log in to Self Service Applications with the XML Publisher Administrator responsibility.

Navigate to Home and then Templates.

1. Select Order Capture in the Application field and click Go.

2. Select the Default Quote Printout template.

3.  Click the Download icon to download ASOPRTRTF.rtf.

4.  Add custom fields to the ASOPRTRTF.rtf file and save the changes.

5.  Use the Return to Templates link to navigate back to the Templates tab.

6.  Select the Default Quote Printout template and click the Duplicate icon to create a duplicate of this template.

7.  In the Copy Template page, specify these details for the template: code, name and application. Click Apply.

8.  Query for the new template in the Templates tab. Select the template to view its details.

9.  Click the Update icon in the Localized Templates section and specify the path to the modified RTF file. Click Apply.

10. Bounce the Apache Server.

11. ASOPRTRTF.rtf can be modified and should not be renamed to custom file name.

## Adding or Disabling Templates:

To add or disable templates, log in to Self Service Applications with the XML Publisher Administrator responsibility.

Navigate to Home > Templates.

**Field Behavior**

*   Application

    Select Order Capture.

*   Type

    This is the type of template you want to create. Choose RTF or XSL-FO.

*   Data Definition

    Select Quote Printing.

*   Subtemplate

    If you have chosen to create a RTF template, select No. For a XSL template, select Yes.

    For a XSL template, select the XSL file from your computer, and the corresponding language.

*   Territory

Leave this field blank to make the template territory independent

**Notes**

• To disable a template, enter an end date for the template.

# Product Categories

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

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

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

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

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

# Setting up Manual Pricing and Tax Calculation Request Options

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

In Forms UI, depending on the setting of the *ASO: Enable Batch Processing* profile, you can price the quote interactively or through a batch request. For the same functionality in HTML UI, enable the *Submission Options* field using OA Personalization.

There are two fields in the Quoting UI using which you can opt to price/tax a quote manually or automatically for individual quotes. The fields are Price Calculation and Tax Calculation in the HTML UI and Automatic Pricing and Automatic Tax in the Forms UI. The initial values in these fields are based on the setting in the profiles - *ASO: Calculate Price* and *ASO: Calculate Tax* respectively.

The following table shows suggested settings for the Pricing and Tax fields and profile options in both the UIs, based on different scenarios:

*Pricing Option Scenarios*

| Scenario | Field in-<br><br>**HTML UI**: Price Calculation<br><br>**Forms UI**: Automatic Pricing | Field in-<br><br>**HTML UI**Tax Calculation<br><br>**Forms UI**: Automatic Tax | Forms UI- ASO: Enable Batch Processing Setting | HTML UI- Enable Submission Options field |
|---|---|---|---|---|
| Large number of quote lines, complex pricing and tax setups | Manual | Manual | Yes | Yes |
| Large number of quote lines, simple pricing and tax setups | Manual | Manual | Yes | Yes |
| Small number of quote lines, simple pricing setups, complex tax setups | Automatic | Manual | Yes | Yes |
| Small number of quote lines, simple pricing and tax setups | Automatic | Automatic | No | No |
| Small number of quote lines, simple pricing setups, no tax computation unless requested. | Automatic | Manual | No | No |

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

# Enabling *inter*Media Search

Oracle Quoting supports the use of *inter*Media search against the Product Catalog. Two

Oracle *i*Store profile options affect the behavior of Quoting searches with *inter*Media enabled.

- IBE: Category Set Filter for Product Search

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

- IBE: Web Status Filter for Product Search

  In Inventory, there is a Web Status flag that indicates if an item is web enabled, and if it can be web published. Unlike *i*Store, Quoting does not require that all items have the statuses Published or Unpublished. The profile *IBE: Web Status Filter for Product Search* allows you to specify if items with specific web statuses are populated in the *i*Store search table. This profile defaults to Published, and if null, is treated as Published. Therefore, if you want Quoting searches to continue with existing behavior, you must set the profile option *ASO: Web Status Filter for Product Search* to *ALL* at the Site level.

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

Please note that the following characters are treated as literal characters when performing an *inter*Media search:

- \

- ,

- &

- (

- )

- ?

- }

- ]

- {

- [

- -

- ~

- |

- $

- !

- >

Ensure that both Oracle *inter*Media and Oracle Inventory are properly set up and configured. Refer to the *Oracle interMedia* documentation for information on setting up *inter*Media. Refer to the *Oracle Inventory User's Guide* for information on setting up Inventory.

To enable *inter*Media search in Forms Quoting:

1. Set the *ASO: Enable Intermedia Search* profile option.

   See Profiles in Oracle Quoting, page A-1 for more information.

2. Run the concurrent program *iStore Search Insert*.

   > **Note:** Only *inter*Media Search is supported in HTML Quoting. Hence, it is enabled by default.

# Running *i*Store Search Insert

Run the *i*Store Search Insert concurrent program after initially loading your products into Oracle Inventory. This program should be run once, as a post install step during implementation.

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

- You add multiple products that are not available in the search table

- You want to purge all data from the search table

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

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

To run the *i*Store Search Insert program, log in to Oracle Forms with the *i*Store Concurrent Programs responsibility. Navigate to *i*Store Concurrent Programs > Concurrent Request window.

## Refreshing the Search Index

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

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

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

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

The changes appear in the product catalog.

## Setting Up Account Creation Requirements for Quotes

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

Oracle Quoting allows you to determine at which point an account must be created. Account creation is based on the *ASO: Auto Account Creation* profile. The profile determines when an account should be automatically created.

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

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

- **Create accounts as necessary**— Accounts are created only when a quote is web published or when a quote is converted into an order.

- **Create accounts only when Place Order**— Accounts are created only when the

quote is converted into an order.

For more information on the profile options, see Appendix A, "Profiles in Oracle Quoting", page A-1.

## Scenarios

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

*Oracle Quoting Behavior Based on the Account Profile Option*

| 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 *Always* | Create account | Create account if customer has none | Create account | Create account if customer has none | Create account for all customers in quote without account | Create account for all customers in quote without account |
| *ASO: Auto Account Creation* set to As Required | Do not create account | Do not create account | Do not create account | Do not create account | Create account for any customers in quote without account | Create account for any customers in quote without account |
| *ASO: Auto Account Creation* set to *Place Order* | Do not create account | Do not create account | Do not create account | Do not create account | Throw error if any customers on quote do not have accounts | Create account for all customers on quote without an account |

## Changing Quote To Customer for a Quote

When you duplicate or update a quote you can change the Customer Name or Account Number. You can select the attributes for quote header and quote line to copy to the new quote.

You must enable the Change Customer action for the ASO: Quote Actions in HTML UI lookup type.

# Setting Up Validations for Model Configurations

Set the ASO: Configuration Effective Date profile option to validate the configuration for the following flows:

- Change quantity for the top level model configuration

- Change quantity for a component of a model configuration

- Delete component of a model configuration

- Split Quote Line

- Manual validation of model configuration

- Place order with status as Entered

Set the ASO: Configuration Effective Date profile option to configure effective and lookup dates for the model item for the following flows:

- Launch Configurator UI for a top level model in a quote

- Launch Configurator UI for a top level model in a quote template

Set the ASO: Copy Configuration Effective Date profile option to configure effective and lookup dates for the copied model configuration for the following flows:

- Copy Quote

- Version Quote

- Copy Quote Line

- Apply quote template to a quote

- Create quote template from a quote

> **Important:** To manually validate configurations in a quote you must enable Validate Configuration value for the ASO: Quote Actions in HTML UI (ASO_QUOTE_ACTION) lookup type.

For more information about ASO: Configuration Effective Date and ASO: Copy Configuration Effective Date profile options, see Profile Options for Defaulting.

## Quoting Integration with Oracle Proposals

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

The Proposals function is available from the Forms and HTML interfaces of Oracle Quoting.

## Setting up Web Publishing Functionality

Web publishing functionality allows sales representatives to publish quotes to customers through Oracle *i*Store specialty stores. For information on setting up Web Publishing functionality, refer to the "Setting Up Web Publishing", page 6-1 chapter for more information.

## Setting up Approvals

For information on setting up Approvals functionality, refer to the "Integrating Oracle Quoting With Oracle Approvals Management", page 7-1 chapter.

## Setting up Availability to Promise (ATP)

For all information regarding setting up ATP in Oracle Quoting, refer the *Oracle Global Order Promising Implementation Guide* and the *Oracle Configure to Order Process Guide*.

## Setting up Sales Contracts

Oracle Sales Contracts integrates with Oracle Quoting. This enables the sales representative to attach sales contracts as part of a quote.

For more information on setting up sales contracts functionality, refer to the "Integrating Oracle Quoting With Oracle Sales Contracts", page 8-1 chapter.

## Setting Up Credit Check Functionality

Oracle Quoting allows the user to determine the credit worthiness of a customer before the quote is converted into an order. The profile option *ASO: Enable Credit Check* determines if credit checks can be performed. See Appendix A, "Profiles in Oracle Quoting", page A-1 for more information.

Oracle Quoting provides a public API for credit checking: ASO_CREDIT_CHECK_PUB.CREDIT_CHECK. The following information is mandatory for the public API:

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

- Credit Check Rule

- Quote Total

- Quote Currency

The credit check API consists of two sections:

- Internal credit check—This is based on the Oracle Order Management public API.

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

## Internal Credit Check

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

- Transaction data in the quote

- Historic transaction data in Oracle Order Management and Oracle Receivables

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

To perform internal credit checks, you must:

- Ensure that the customer is enabled for credit checks.

  See the *Oracle Receivables User Guide* for more information.

- Set credit limits.

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

- Define credit check rules in Oracle Order Management.

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

  For more information, see the *Oracle Order Management Implementation Manual*.

# Defining Credit Check Rules

You designate the credit check rule used for performing credit checks in the profile option *ASO: Credit Check Rule*. This is an optional profile, but if it is not set, users cannot perform internal credit checks. See Appendix A, "Profiles in Oracle Quoting", page A-1 for more information.

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

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

- **Include Tax** — If set, the quote total passed to the API includes the total tax amount. If not set, the quote total excludes tax.

Log in to Oracle Forms as an Order Management Super User.

Navigate to Setup > Credit > Define Credit Check Rules

**Field Behavior**
- **Options** tab

  - Credit Check Level - Select Sales Order

  - Credit Hold Level - Select Sales Order

  - Select the Send Hold Notifications checkbox.

- **Exposure** tab

  - To include the shipping and freight charges on the quote and on uninvoiced orders in the credit check calculation, you must select the Freight and Special Charges checkbox.

  - To include the tax for the quote and uninvoiced orders in the credit check calculation, you must select the Include Tax checkbox.

**Notes**
- Follow the procedure described in the *Oracle Order Management Implementation Manual* for complete information on defining credit check rules.

# External Credit Check

External credit checks are configurable by the application developer and allows users to

make calls to non-Oracle applications. The credit check can be configured by writing code for the pre-hook and post-hook in the Quoting public API, ASO_CREDIT_CHECK_PUB.CREDIT_CHECK. The pre-hook is executed prior to the internal credit check and the post-hook is executed after the internal credit check. Oracle Quoting customers can use these hooks to invoke the external credit checking.

For information on implementing user hooks, see Implementing User Hooks, page 4-34 .

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

- **asocruhk.sql** — The Populate Script populates data into the JTF_USER_HOOKS table. This script is run automatically.

- **asoenuhk.sql** — The Enabling Script enables or disables the user hook based on the parameter passed. You must execute this script.

## Populate Script

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

- Customer Pre Hook

- Customer Post Hook

## Enabling Script

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

**Parameters**

This script accepts the following parameters:

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

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

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

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

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

# Implementing User Hooks

To implement user hooks, you must:

1. Populate the JTF_USER_HOOKS table

2. Enable User Hooks

3. Disable User Hooks

### Populating the JTF_USER_HOOKS table:

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

### Enabling User Hooks:

To enable user hooks:

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

2. Enter each parameter. For enabling user hooks with the ENABLE parameter, the value should be **Y**.

3. You must implement the **hook package** when the corresponding hook is enabled.

### Disabling User Hooks:

To disable user hooks:

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

2. Enter each parameter. For disabling the user hook with the ENABLE parameter, the value should be N.

# Setting up QA Check

You can set up a QA check to validate a quote at various key events in the quote lifecycle. You can either enable a business event, or manually select the QA Check option for a quote. You can set up the business event using custom business rules in Java or using a Web service.

Steps to set up QA Check for a quote using a business event are as follows:

1. Log in to the application and select the System Administrator or Workflow Administrator Web Applications responsibility.

2. Navigate to Workflow: Administrator Workflow and Business Events.

3. Enable the business events for which the QA check must be executed. The business

event names are prefixed with **oracle.apps.qot.events.quote**.

4.  Enable the **oracle.apps.qot.events.quote.group.pre** event group if you are going to write a subscription for the event group.

5.  Define a synchronous subscription for each business event for which the QA check must be automatically started. Alternately, you can define a single subscription for the oracle.apps.qot.events.quote.group.pre event group.

6.  The Java method or PL/SQL procedure in the subscription queries the quote and performs the quote validations. Alternately, you can call a Web Service as part of the subscription. The Web Service performs the quote validations. The key input to the subscription is the quote header ID.

    The Java method or PL/SQL procedure returns the results of the QA check in XML format in WF_EVENT_T.EVENT_DATA.

Steps to manually perform a QA Check for a quote are as follows:

1.  Enable QA Check lookup code in ASO : Quote Actions in HTML UI (ASO_QUOTE_ACTION) lookup.

2.  Enable the oracle.apps.qot.events.quote.qa_check.pre business event and write subscription for this event. Perform steps 1 to 6 of the procedure for setting up QA check through a business event.

## QOT Pre-Event Business Event Group

The QOT Pre-Event business event group contains all the pre event groups for setting up the QA Check. The following table provides the definition of the business event group:

| Name | Value |
|---|---|
| Name | oracle.apps.qot.events.quote.group.pre |
| Display Name | QOT Pre-Event Group |
| Description | Includes all the pre events defined for Oracle Quoting |
| Status | Disabled |
| Owner Name | Oracle Quoting |

| Name | Value |
| --- | --- |
| Owner Tag | QOT |
| Customization Level | Limit |

For more information about the oracle.apps.qot.events.quote. event, see Oracle Integration Repository (iRep).

## XML Tags Used for the Output of QA Check

The subscription for the business event returns the results of the QA Check in XML format. The table below indicates the XML tags that are used in the output of the QA Check function:

| Name | Description |
| --- | --- |
| <summary> | Provides an overall summary for subscription processing. |
| <attribute key="SEVERITY"> | Indicates the overall severity level. The values are Warning, Error, and Confirmation. Any other value will be treated as an Error. Ignore case of the string in the value tag. |
| <attribute key="MESSAGE"> | The message text displayed on the QA Check Results page. If display="false", no message is displayed. |
| <attribute key="SHOW_PAGE"> | If display ="true", the results page is shown. |
| <pagetitle key="PAGETITLE"> | The title for the page. |
| <tabletitle> | The heading for the table. The results table can contain a maximum of 20 columns. If a column is present in the XML output, it is displayed. |
| <attribute key="ATTRIBUTE1"> | The first column in the results table. The Title attribute is the column name. |

| Name | Description |
|---|---|
| <attribute key="ATTRIBUTE2"> | The second column in the results table. The Title attribute is the column name. |
| ...<more attributes> | |
| <tablebutton key="EXPORT"> | Displays the button to export the table to MS-Excel. Click the button to export table data to MS-Excel. The button is shown if display="true". |
| <tabledata> | The row data for the QA check. The number of columns in the data table must match in the table header (<tabletitle>) |
| <button key="CANCEL"> | Displays the Cancel button. Click the button to stop processing and return to the page where the action was initiated. It should be used in conjunction with the Continue button. The button is shown if display="true". |
| <button key="CONTINUE"> | Displays the Continue button. Click the button to continue processing. The button is shown if display="true". |
| <button key="DONE"> | Displays the Done button. Click the button to stop processing and return to the page where the action was initiated. The button is shown if display="true". |

## Sample Java Code to Perform a QA Check

This section provides a sample code to perform a QA Check when creating a version of a quote and the steps to use the code.

```
/*
========================================================================
 A. Header payment validation
   If a header payment term is Net 90 and Account Number for a quote is
1608, display the following error message: Payment Terms Net 90 is not
allowed for this customer.

B. Line level Flexfield validation
   If Chassis Style line flexfield (ATTRIBUTE1) is blank, display the
following warning: Chassis Style is not specified.

C. Item validation
   If the Part Number on the quote line is 'TEMPITEM', then display the
following error message: Please replace the placeholder item with the
correct item.

   If there are no errors, then the user can proceed with the Create
Version action.


Reference document: Oracle Workflow API Reference
========================================================================
*/
```

```
package oracle.apps.qot.events.quote;

import java.math.BigDecimal;

import oracle.apps.fnd.wf.bes.BusinessEvent;
import oracle.apps.fnd.wf.bes.SubscriptionInterface;
import oracle.apps.fnd.wf.bes.server.Subscription;
import oracle.apps.fnd.wf.common.WorkflowContext;

import oracle.jdbc.OracleConnection;
import java.sql.DriverManager;
import java.sql.Connection;
import java.sql.PreparedStatement;
import java.sql.CallableStatement;
import java.sql.ResultSet;
import com.sun.java.util.collections.ArrayList;
import java.util.StringTokenizer;

import oracle.apps.aso.schema.orderCapture.server.AsoQuotePub;

public class QotQACheckEvent implements SubscriptionInterface
{

  private final static String SQL_paymentQuery = new StringBuffer(
"select HCA.account_number, ap.payment_term_id")
  .append( " FROM aso_quote_headers_all aqha," )
  .append( " hz_cust_accounts hca,"  )
  .append( " aso_payments ap ")
  .append( " WHERE aqha.cust_account_id = hca.cust_account_id(+)" )
  .append( " and aqha.quote_header_id = ap.quote_header_id" )
  .append("  and ap.quote_line_id is null" ).toString();


  private final static String SQL_lineFlexQuery = "select attribute1,
quote_line_id from aso_quote_lines_all";

  private final static String SQL_itemNbr = "select
msiv.concatenated_segments, aqla.quote_line_id " +
  "from mtl_system_items_vl msiv, aso_quote_lines_all aqla " +
  "where msiv.inventory_item_id = aqla.inventory_item_id " +
  "and msiv.organization_id = aqla.organization_id";


  public void onBusinessEvent(Subscription s, BusinessEvent b,
WorkflowContext c)
  {
    String eventName = b.getName();
    String eventKey = b.getKey();
    StringBuffer eventOut = new StringBuffer();
    Connection connection = null;

    try{


      CallableStatement cstmt = null;

      connection = c.getJDBCConnection();

      // initialize org context

      try {
```

```
        cstmt = connection.prepareCall("Begin
dbms_application_info.set_client_info('204'); End;");
            cstmt.execute();
            cstmt.close();
            cstmt = connection.prepareCall("Begin
po_moac_utils_pvt.set_org_context('204'); End;");
            cstmt.execute();
            cstmt.close();

        } catch (Exception e) {

            b.setResponseData(e.toString());

        }

        // The following codes perform the QA Check for business event -
create new quote version
        if(eventName!=null)

        {

          // Validate header payment terms
          String paymentMsg = validateHeaderPayment(connection, eventKey);

          // Validate line level flexfields
          ArrayList lnFlexMsg = validateLnFlexfileds(connection,eventKey);
          ArrayList itemMsg = validateItems(connection, eventKey);

           boolean errorPage = (paymentMsg!=null || itemMsg!=null &&
itemMsg.size()>0);

          // Construct XMLresponse string if validation fails
          if(paymentMsg!=null || (lnFlexMsg!=null && lnFlexMsg.size()>0)
||(itemMsg!=null && itemMsg.size()>0))
          {
            eventOut.append("<root>");
            eventOut.append(printSummary(errorPage, true));
            eventOut.append(printPageTitle(eventName+" QA Check
Results"));

            String[] colNames = new String[] {"QA Check Name", "Line",
"Severity", "Message"};

            eventOut.append("<resultstable>");
            eventOut.append(printTableTitle("Results", colNames, true));

            ArrayList tableDataLst = lnFlexMsg;

            for(int l=0; l<itemMsg.size(); l++)
            {
              tableDataLst.add(itemMsg.get(l));
            }

            if(paymentMsg!=null)
              tableDataLst.add("Header Payment Terms:
:Error:"+paymentMsg);

            eventOut.append(printTableData(tableDataLst));

            eventOut.append("</resultstable>");
```

```
           eventOut.append(printPageButtons(!errorPage, errorPage));

                 eventOut.append("</root>");
             }
          }

          //set QA Check output XML string as business event response
          b.setResponseData(eventOut.toString());

        }
        catch (Exception e)
        {
          b.setResponseData(e.toString());
        }
      }


       //  Validate header payment

      private  static String validateHeaderPayment(Connection conn, String
    key)
      {
        PreparedStatement statement = null;
        ResultSet rs = null;
        String msg = null;
        BigDecimal accountNumber = null;
        BigDecimal paymentTermId = null;
        String paymentQuery = SQL_paymentQuery+" and aqha.quote_header_id
    ="+key;

        try{
          statement = conn.prepareStatement(paymentQuery);

          rs = statement.executeQuery();

          while(rs!=null && rs.next())
          {
            accountNumber = rs.getBigDecimal(1);
            paymentTermId = rs.getBigDecimal(2);
          }
          if(accountNumber!=null && "1608".equals(accountNumber.toString())
    && paymentTermId!=null && "1041".equals(paymentTermId.toString()) )
          {
              msg =  "Payment Term 'Net 90' is not valid for this customer";
          }
        }
        catch(Exception e)
        {
           msg ="Exception in payment term validation. ";
        }
        finally
        {
          if(rs!=null)
            try{rs.close();} catch(Exception e){}
          if(statement!=null)
            try{statement.close();}catch(Exception e){}
        }
        return msg;
      }

      // validate item
```

```
private static ArrayList validateItems(Connection conn, String key)
  {
    ArrayList msg = new ArrayList();
    PreparedStatement statement = null;
    ResultSet rs = null;
    String partNbr = null;
    BigDecimal quoteLineId = null;
    String lineNbr = null;
    String itemQuery = SQL_itemNbr+" and aqla.quote_header_id="+key;

    try{
        statement = conn.prepareStatement(itemQuery);
        rs = statement.executeQuery();
        while(rs!=null && rs.next())
        {
          partNbr = rs.getString(1);
          quoteLineId = rs.getBigDecimal(2);
          lineNbr = AsoQuotePub.getUILineNumber((OracleConnection) conn,
quoteLineId);
          if("TEMPITEM.".equals(partNbr))
          {
            msg.add("Placeholder Item:"+lineNbr+": Error : Please
replace the placeholder item with the correct item");
          }
        }
    }
    catch (Exception e){}

    return msg;
  }


  // Validate line level flexfields
  private static ArrayList validateLnFlexfileds(Connection conn, String
key)
  {
    ArrayList msg = new ArrayList();
    PreparedStatement statement = null;
    ResultSet rs = null;
    BigDecimal quoteLineId = null;
    String lineNbr = null;
    String attribute1 = null;
    String lnFlexQuery = SQL_lineFlexQuery+" where quote_header_id
="+key;

    try{
      statement = conn.prepareStatement(lnFlexQuery);

      rs = statement.executeQuery();

      while (rs!=null && rs.next())
      {
        attribute1 = rs.getString(1);
        quoteLineId = rs.getBigDecimal(2);
        lineNbr = AsoQuotePub.getUILineNumber((OracleConnection) conn,
quoteLineId);

        if(attribute1==null||"".equals(attribute1))
        {
          msg.add("Line Flexfield:"+lineNbr+": Warning : Chassis Style
is not specified");
```

```
    }
        }
      }
      catch(Exception e)
      {
        msg.add("exception in line flexfield validation");
      }
      finally
      {
        if(rs!=null)
          try{rs.close();} catch(Exception e){}
        if(statement!=null)
          try{statement.close();}catch(Exception e){}
      }

      return msg;
  }


    // Returns results table header string
  private static String printTableTitle(String tableName, String[]
columnNames, boolean renderExportBtn)
  {
        String tableTitle = "     <tabletitle>\n" +
        "           <group key=\"TABLE1\" title=\""+tableName+"\">\n" ;
        for(int i=0;i<columnNames.length;i++)
        {
          tableTitle = tableTitle +
        "             <attribute key=\"ATTRIBUTE"+(i+1)+"\"
title=\""+columnNames[i]+"\" type=\"text\"> </attribute>\n" ;
        }
        tableTitle = tableTitle +
        "             <tablebutton key=\"EXPORT\" title=\"Export\"
display=\""+(renderExportBtn?"true":"false")+"\"> </tablebutton>\n" +
        "           </group>\n" +
        "     </tabletitle>\n";

        return tableTitle;
  }


  // Returns QA result data table string
  private static String printTableData(ArrayList resultData)
  {
    String tableData = "<tabledata>\n" +
    "      <group key=\"TABLE1\">\n";
    String record = null;
    for(int i=0; i<resultData.size(); i++)
    {
      record = (String) resultData.get(i);
      StringTokenizer st = new StringTokenizer(record, ":");

      tableData +=    "          <row>\n" ;
      int index = 1;
      while(st.hasMoreElements())
      {
        tableData+="             <attribute key=\"ATTRIBUTE"+index+"\"
value=\""+st.nextToken()+"\"> </attribute>\n" ;
        index++;
      }
      tableData += "          </row>\n";
```

```
}
    tableData += "        </group>\n" +
    "  </tabledata>\n";

    return tableData;
  }

  // Returns summary string
  private static String printSummary(boolean errorPage, boolean
showPage)
  {
    String summary ="  <summary>\n" +
    "     <attribute key=\"SEVERITY\"
value=\""+(errorPage?"Error":"WARNING")+"\" display=\"false\">
</attribute>\n" +
    "     <attribute key=\"MESSAGE\" value=\"Please review the following
QA check messages\" display=\"true\"> </attribute>\n" +
    "     <attribute key=\"SHOW_PAGE\"
display=\""+(showPage?"true":"false")+"\"> </attribute>\n" +
    "  </summary>\n"  ;
    return summary;
  }

  // Returns page title string
  private static String printPageTitle(String pageTitle)
  {
    String pageTitleStr ="  <pagetitle key=\"PAGETITLE\"
value=\""+pageTitle+"\" display=\"true\">  </pagetitle>\n";
    return pageTitleStr;
  }

  // Returns page buttons string
  private static String printPageButtons (boolean renderContBtn, boolean
renderDoneBtn)
  {
    String buttonsStr = "<button key=\"CANCEL\" title=\"Cancel\"
display=\""+(renderContBtn?"true":"false")+"\">  </button>\n" +
    "<button key=\"DONE\" title=\"Done\"
display=\""+(renderDoneBtn?"true":"false")+"\">  </button>\n" +
    "<button key=\"CONTINUE\" title=\"Continue\"
display=\""+(renderContBtn?"true":"false")+"\">  </button>\n";

    return buttonsStr;
  }

}
```

Perform the following steps to use the Java file:

1. Modify the code to connect to the testing database.

2. Compile the Java code.

3. Log in to UNIX environment and copy the class file to
   $JAVA_TOP/classes/oracle/apps/qot/events/quote folder. Create the folder if it does
   not exist.

4. Log in to Oracle Quoting and select the System Administrator or Workflow

Administrator Web Applications responsibility.

5. Enable the business event for create version for a quote.

6. Setup the subscription for the business event, and specify the following Java rule function: oracle.apps.qot.events.quote.QotQACheckEvent.

### Testing the Business Event

Perform the following steps to test the business event:

1. Log in to the application and select the System Administrator or Workflow Administrator Web Applications responsibility.

2. Navigate to Workflow: Administrator Workflow and Business Events.

3. On the Events page, search for oracle.apps.qot.events.quote. business event.

4. Click the Test icon for your business event.

5. Specify Event Key as Quote Header ID.

6. Click the Raise in Java button for Java method or the Raise in PLSQL button for PL/SQL procedure. The information message is displayed for the business event.

## Purging Quotes

The Purge Quote security function is assigned to a user for purging quotes. Quotes are purged using the Purge Quote concurrent program. The eligible quotes that can be purged are referenced in the ASO_PURGE_QUOTES table.

The ASO_QUOTE_HOOK.POPULATE_PURGE_QUOTES_TEMP public API is used to identify the quotes to be purged. This API is invoked when the Purge Quote concurrent program is run with the Review Candidate Quotes to be Purged parameter value as Yes. Customers can customize the API for defining the list of quotes to be purged.

The ASO_QUOTE_HOOK.POPULATE_PURGE_QUOTES_TEMP public API parameters are described in the Oracle Integration Repository.

## Setting up Sales Supplement Templates

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

Once setup is complete in the Forms UI, Sales Supplement information is accessible to sales representatives in the HTML and Forms UIs. In the Forms UI, Sales Supplement functionality is enabled using the profile option *ASO: Enable Sales Supplement*. In HTML

UI, enable Sales Supplement using OA Personalization.

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

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

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

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

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

Available component types are:

- Note

- Header

- Footer

- Question

There are seven types of responses:

- Predefined Responses — Supports user selection from predefined text

- Text — Supports end user input

- Currency — Supports end user input

- Number — Supports end user input

- Date — Supports end user input

- Textbox — Supports medium length text entries of upto 10 lines with 100 characters in each line.

- File Attachment — Supports association of file attachments.

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

- List of Values

- List of Values With Blank

- Radio Group

- Checkbox

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

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

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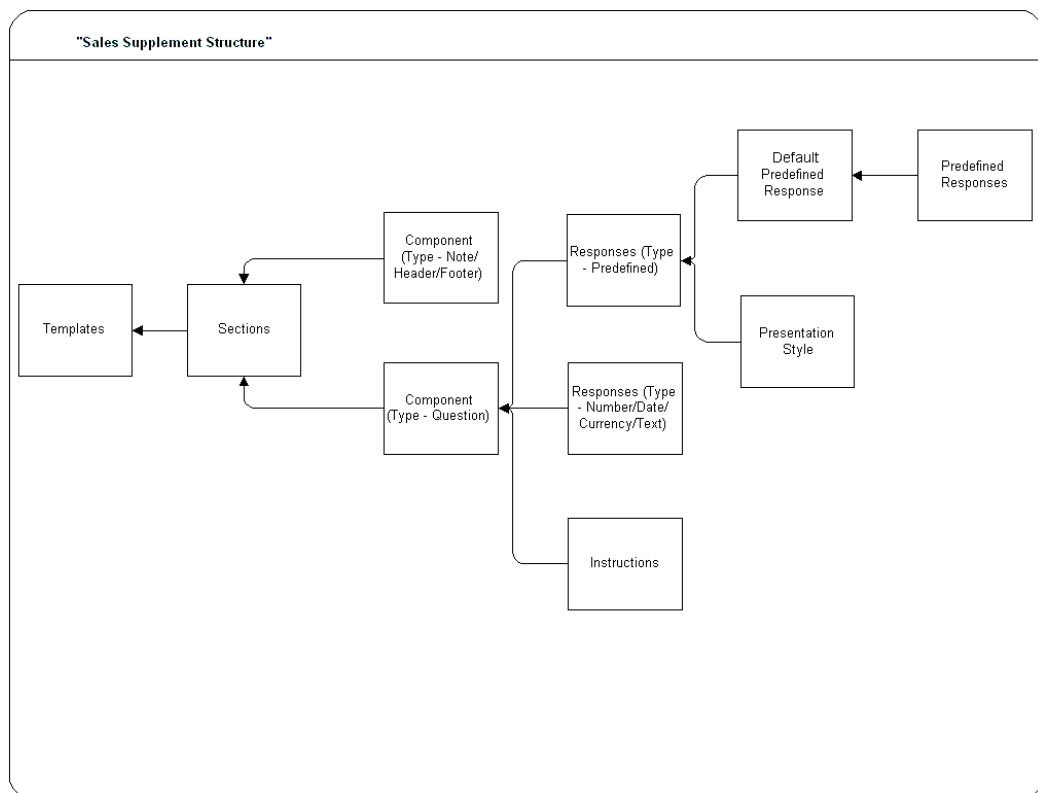


**Prerequisites**
- In order for users to view the information you set up in this form in Forms Quoting, you must enable Sales Supplement by setting the profile option *ASO: Enable Sales Supplement* to *Yes*.

Log in to Oracle Forms with the Quoting Sales Manager responsibility.

Navigate to Quoting > Setup > Sales Supplement.

**Notes**
- Sales Supplement templates are created in reverse order, beginning with the

responses and ending with the template. You must manually query each tab, as the tabs are not automatically queried. Each tab behaves as a standalone tab and therefore, you must save your work in each tab.

- Templates can be applied at the header, line, or header and line levels. The default value is Quote Header and Line. You can designate default templates for header and line levels based on the profile options *ASO: Default Header Level Sales Supplement Template* and *ASO: Default Line Level Sales Supplement Template*.

**Field Behavior**

- Components tab

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

- Sections tab

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

- Template tab

  The Application's list of values are based on the FND lookup ASO_SUP_TEMPLATE_CONTEXT.

# Creating Additional Attachments Document Categories

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

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

# Defining Descriptive Flexfield Information

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

> **Note:** There are a maximum of 20 flexfields at the quote header level and 20 flexfields at the quote line level.

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

In the HTML UI, header level flexfields are located in the Create Quote, Update Quote, and Create Quote from Opportunity pages. Line level flexfields are accessed from the Product Information tab in the Lines page.

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

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

# Specifying Flexfields

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

Log in to Oracle Forms with the Application Developer responsibility.

Navigate to Flexfield > Descriptive > Segments.

**Field Behavior**

- Application

  Query for *Order Capture*

- Title

  For header flexfields, query for *Header%*

  For line flexfields, query for *Lines%*

- Segments

  Set up flexfield segments and map the segments to attributes

**Notes**

- Set up flexfields for the Oracle Order Management application, Additional Header Information Title exactly as you did for Oracle Order Capture.

**Reference**

Oracle Application Developer's Guide

## Notes from Opportunities

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

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

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

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

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

## Tasks From Opportunities (HTML only)

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

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

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

- Task type is available to all possible sources—The task type was not mapped to a particular source object.

- Task type is available to the seeded source object Quoting—The CRM Administrator mapped the task type to the Quoting source object (ASO_QUOTE).

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

# Enabling Oracle Quoting Features with OA Personalization (HTML Only)

With OA Personalization, you can customize your Quoting HTML interface by adding/removing/moving fields to locations where you are most comfortable. There are also some features in Oracle Quoting HTML UI that must be enabled via OA Personalization. To be able to personalize your UI, set the *Personalize Self-Service Defn* profile to *Yes* and the *Disable Self-Service Personal* profile to *No*. For more information on OA Personalization, refer the *Oracle Applications Framework Personalization Guide*.

- OA Personalization is applicable only in the HTML interface of Oracle Quoting.

- Sometimes, Oracle Forms launches the Quoting HTML interface for particular features like the Print Quote functionality. If personalizations are set at the Responsibility level, the behavior may be different between Forms and HTML Quoting.

## Web Publishing

You must expose the fields in the following Quoting sections to enable web publishing in Quoting HTML.

- Simple/Advanced Search

  Expose Web Published search criteria

  Expose the Assistance Requested and Assistance Reason columns

- Views/Simple/Advanced Search

  Expose Web Published in the search results table

  Expose Web Published in the quote details

  Expose the Assistance Requested and Assistance Reason columns in the quote details

- Saved Search

  Expose Web Published in the "Available Columns" shuttle

  Expose Web Published in "Column Name" LOV

  Expose Web Published in the "Add another" LOV

  Expose the Assistance Requested and Assistance Reason columns

- Update Quote page

  Expose Web Published

### Simple Searches

The following Simple Search quote parameters are not displayed by default. Use OA Personalization to enable them.

- Quote Number

- Account Number

- Primary Salesperson

- Expiration Date From

- Expiration Date To

### Advanced Searches

The following Advanced Search quote parameters are not displayed by default. Use OA Personalization to enable them.

- Web Published

- Assistance Requested

- Assistance Reason

### Create Quote and Create Quote from Opportunity pages

The following quote fields are not displayed by default when you create a fresh quote or a quote from an opportunity. You can enable them using OA Personalization.

- Status

- Address

- Quote Number

- Price Calculation

- Tax Calculation

### Quote Header

The following quote fields in the Quote Header are not displayed by default. Use OA Personalization to display them.

- Pricing Request

- Web Published

- Assistance Requested

- Assistance Reason

- Price Calculation

- Tax Calculation

- Address

### Quote Lines

The following fields in the quote line's Products tab are not displayed by default. You can enable them using OA Personalization.

**Products Tab**

- Long Description

- Discount Amount

- Total Charges

- Line Category

- Line Type

- Instance Name

- Charge Periodicity

## OA Personalization and Profiles

Some of the features that were controlled by profile options can now be enabled/disabled via OA Personalization in the HTML UI. Some of these profiles have been obsoleted altogether, and the others are applicable only to the Forms UI. See the "remarks" in the Oracle Quoting Obsoleted Profiles, page A-41 section and the "notes" in the description of the profiles for more information.

## 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

- Availability Details

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*.

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 |

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

| Form | Field |
|------|-------|
| Quote Lines > Ship To | Customer |
| Quote Lines > Shipping | Requested Date |
| Quote Lines > Service | Reference Type |
| Sales Team | Full Access |
| Sales Team | Name |
| Price Adjustments | Remove |
| Price Adjustments | Adjustment |
| Price Adjustments | Adjustment Group |
| Price Adjustments | Value |
| Price Adjustments > Details (Price Break Header) | Required Quantity |
| Price Adjustments > Details (Price Break Header) | Adjustment Value |
| Price Adjustments > Details (for a Promotional Good - qualifying item) | Line |
| Price Adjustments > Details (for a Promotional Good - qualifying item) | Promotional Product |
| Price Adjustments > Details (for a Promotional Good - promotional item) | Line |
| Price Adjustments > Details (for a Promotional Good - promotional item) | Qualifying Product |
| Price Adjustments > Details (for an Other Item Discount - qualifying item) | Line |
| Price Adjustments > Details (for an Other Item Discount - qualifying item) | Discounted Product |

| Form | Field |
|------|-------|
| 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 |
| Availability Details | Line |
| Availability Details | Product |

# Verify the Implementation

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

1. Create a complex quote.

2. Create a new customer for your quote.

3. Add and configure a model item.

4. Before submitting the quote as an order, create a new contact for the customer.

5. Before submitting a quote as an order, create a shipping or billing address for the customer.

6. Submit the order.

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

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

# 5

# Setting Up Defaulting Rules

This chapter covers the following topics:

- Overview of Defaulting Rules
- Creating Defaulting Rules
- Changing the Seeded Dependency in Defaulting Rules
- Concurrent Programs in Defaulting Rules
- Seeded API Signature for the PL/SQL Source Type

## Overview of Defaulting Rules

Defaulting rules enable you to create and update quotes easily. Based on the setup, appropriate fields in the quote are automatically filled in. Oracle Quoting has seeded defaulting rules that mirror the behavior of the application when defaulting was hard coded. However, you have the flexibility to disable the seeded rules and add your own.

You can enable defaulting rules by setting the *ASO: Enable Defaulting Rule* profile to *Yes*. See Profile Options for Defaulting, page A-27 for more details.

The following sections explain some terms that are part of the defaulting rules setup.

## Defaulting Rules

Defaulting rules populate values into fields in a quote (both header and line). You can define the rules and the sequence in which the defaulting must take place. You can also define the trigger and dependant fields.

You can set up defaulting rules such that most of the mandatory and business rules-centric fields are taken care of. By doing so, you can focus on other aspects of the quote.

## Entities

Entities represent specific flows in Oracle Quoting when defaulting should occur. The entities in Quoting are Quote Header, Quote Line, and Quote Oppty.

- Quote Header

  Applicable to Create Standalone Quote and Update Quote (all quotes) flows

- Quote Line

  Applicable to Create Standalone Quote and Update Quote (all quotes) flows

- Quote Oppty

  Applicable only to Create Quote from Opportunity flow

## Defaulting Condition Templates

Defaulting condition templates act like top-level filters based on which the corresponding defaulting rules are executed. Entities are the conditions for the filters. Each entity has attributes. Defaulting rules are applicable to these attributes within an entity.

For example, Payment Type and Customer are entities. The attributes for these entities are Credit card and Business World respectively. Always is a generic condition.

## Attributes

Attributes are individual fields in the quote. Defaulting rules are created for some of the quote attributes. The defaulting rule indicates what the default value for the attribute should be and the source from where it should be derived. Based on the defaulting condition, the corresponding defaulting rule is chosen for the attribute.

## Source Types

The source types provide default values for the quote attributes. The following are the seeded source types for Oracle Quoting.

*Seeded Source Types for Defaulting*

| Source Type | Meaning |
| --- | --- |
| Same Record | Using 'Same Record' as a source type, you can default an attribute from another attribute on the same entity record. For example-<br><br>• The Quote To Customer, Account can be used as a source for defaulting the Bill To Customer, Account.<br><br>• The Expiration Date can be used as a source for defaulting the Pricing Date. |
| System Variable | This system variable source option enables you to default system variables or functions of system variables for a field. This may be used to default date fields where SYSDATE expression or functions on SYSDATE can be used to default the current date or a function of the current date. For example, you can set up the quote expiration date to be SYSDATE+30. |
| Constant Value | This source type enables you to specify a constant value instead of a field that contains a value. This will be useful if you want the default to be the same value or to be used if none of the other sources for the defaulting rule can provide a value. |
| Profile Option | This allows you to use a profile option, either system or user-defined, as a default value source. |
| PL/SQL API | This source type allows you to set up a complex defaulting rule that cannot be defined with the other source types listed above. The logic to derive the default value is coded into a PL/SQL API. The API name is referenced within the defaulting rule setup. See Seeded API Signature for PL/SQL, page 5-14 for more information. |
| Related Record | The related record can derive values from the corresponding field in the Quote Header.<br><br>**Important:** This source type is applicable only for line-level attributes. |

| Source Type | Meaning |
|---|---|
| Web Applications Dictionary-Attribute and Web Applications Dictionary - Object Attribute | **Important:** Both these source types are not supported in Oracle Quoting. |

## Sequencing in Defaulting Rules

Sequencing is the order in which the defaulting rules will be applied. Each attribute is associated with a value which determines its sequence.

## Trigger and Dependent Attributes

A trigger attribute has one or more dependent attributes that must be defaulted into when the trigger attribute's value is changed. A dependent attribute must be cleared and defaulted if the corresponding trigger attribute is changed. For example, a defaulting rule can be defined to derive a value for the payment terms and price list attributes if the pricing agreement is changed. In this example, the pricing agreement is the trigger attribute and the payment terms and price list are dependent attributes.

In Oracle Quoting, you can enable dependencies via the Dependency Enabled flag. While setting up trigger and dependent attributes, it is important not to setup cyclical dependencies. Thus, if trigger attribute A has dependent attributes B, C, D and trigger attribute C has dependent attribute A, then there is a cyclical dependency for attribute A. This type of cyclic dependency should be avoided.

## Seeded Mapping Between Trigger and Dependent Attributes

The tables below indicate the seeded mapping between the trigger and the dependent attributes. The current dependencies are enabled by setting the Dependency Enabled flag. You may disable a dependency between the trigger and dependent attributes by setting this flag to No.

*Seeded Mapping Between Trigger and Dependent Attributes (Quote Header)*

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Operating Unit | Order Type | Yes |
| | Price List | Yes |
| | Primary Salesperson | Yes |
| | Contract Template | Yes |
| | Shipping Method | Yes |
| Order Type | Price List | Yes |
| | Shipping Priority | No |
| | Shipping Method | No |
| | FOB | No |
| | Demand Class | No |
| | Freight Terms | No |
| Pricing Agreement | PO Number | No |
| | Payment Terms | Yes |
| | Bill to Customer | No |
| | Bill to Customer Account | No |
| | Freight Terms | No |
| | Price List | Yes |

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Quote to Customer | Quote to Contact | No |
| | Quote to Address | Yes |
| | Quote to Phone | Yes |
| | Bill to Customer | Yes |
| | Bill to Customer Account | Yes |
| | Bill to Contact | No |
| | Bill to Address | Yes |
| | Ship to Customer | Yes |
| | Ship to Customer Account | Yes |
| | Ship to Contact | No |
| | Ship to Address | Yes |
| | End Customer | No |
| | End Customer Account | No |
| | End Customer Contact | No |
| | End Customer Address | No |
| | Automatic Pricing | No |
| | Automatic Tax | No |
| Quote to Customer Account | Price List | Yes |
| | FOB | No |
| | Freight Terms | No |
| | Requested Date Type | Yes |

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Bill to Customer Account | Price List | No |
| | FOB | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Primary Salesperson | No |
| | Shipping Method | No |
| | Order Type | No |
| Bill to Address (Party Site) - If Bill to Customer Account is specified | Price List | No |
| | FOB | No |
| | Demand Class | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Primary Salesperson | No |
| | Shipping Method | No |
| | Order Type | No |
| Ship to Customer Account | Price List | No |
| | FOB | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Primary Salesperson | No |
| | Shipping Method | No |
| | Order Type | No |

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Ship to Address (Party Site) - If Ship to Customer Account is specified) | Price List | No |
| | FOB | No |
| | Demand Class | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Primary Salesperson | No |
| | Shipping Method | No |
| | Order Type | No |
| Price List | Payment Terms | No |
| | Freight Terms | No |
| | Shipping Method | No |
| Primary Salesperson | Primary Salesgroup | Yes |

*Seeded Mapping Between Trigger and Dependent Attributes (Quote Line)*

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Line Type | Price List | No |
| | Shipment Priority | No |
| | FOB | No |
| | Demand Class | No |
| | Freight Terms | No |
| | Warehouse | No |

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Pricing Agreement | PO Number | No |
| | Payment Terms | No |
| | Bill to Customer | No |
| | Bill to Customer Account | No |
| | Freight Terms | No |
| | Price List | Yes |
| Bill to Customer Account | Price List | No |
| | FOB | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Shipping Method | No |
| Bill to Address (Party Site) - If Bill to Customer Account is specified) | Price List | No |
| | FOB | No |
| | Demand Class | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Shipping Method | No |
| Ship to Customer Account | Price List | No |
| | FOB | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Shipping Method | No |

| Trigger Attribute | Dependent Attribute | Seeded Value for Dependency Enabled (Yes/No) |
|---|---|---|
| Ship to Address (Party Site) - If Ship to Customer Account is specified) | Price List | No |
| | FOB | No |
| | Demand Class | No |
| | Freight Terms | No |
| | Payment Terms | No |
| | Shipping Method | No |
| Price List | Payment Terms | No |
| | Freight Terms | No |
| | Shipping Method | No |

If you change the seeded dependencies, you must run the Order Capture Dependency concurrent program. See Order Capture Dependency Generator concurrent program, page 5-13 for more details.

## User Scenarios for Defaulting Rules

Here are some scenarios where defaulting rules can be setup. You can also set up business rules that are specific to one or more operating units.

- Default the Price List attribute at the header level based on the value of Bill To Customer.

- Default the Primary Salesperson based on the Quote To Customer.

- Change the defaulting logic for deriving the expiration date. Instead of using the profile, define the new logic in a PL/SQL API. The PL/SQL API will be the source for defaulting the value in the expiration date field. See Seeded API Signature for the PL/SQL Source Type, page 5-14 for the seeded PL/SQL API source type signature.

## Notes about Defaulting Rules

Some notes about defaulting rules:

- The price list defaulting is not filtered by currency. After the price list defaulting, if the new price list and existing currency combination is not valid or no conversion

exists for it, then the price list is cleared.

- Oracle Quoting does not preserve an existing value for a field if the defaulting rule does not come up with a value for it.

- If Terms Substitution modifiers have been set up, the values in the Payment Terms, Freight Terms, and Shipping Method fields, populated based on defaulting rules, may be overridden after the pricing call.

- Defaulting rules are not applicable for the creation and updation of quote templates.

- Quote line defaulting rules for model components must take into account the nature of top model and parent model (ATO, PTO, Ship Model Complete PTO). For instance, you should not set up a quote line defaulting rule to default different Shipping Methods for the components of an ATO model.

- You cannot use defaulting rules for the following quote header attributes:

  - Quote to Customer

    The Quote to Customer in the Opportunity to Quote flow will get defaulted from the Opportunity and cannot be changed.

  - Opportunity Name

    The Opportunity Name in the Opportunity to Quote flow will get defaulted from the Opportunity and cannot be changed.

  - Quote to Customer Account

    The Quote to Customer Account in the Create Quote flow (standalone quote) does not use the defaulting rules framework.

  - Sales Supplement

    The Sales Supplement field does not use the defaulting rules framework.

  - Quote Status

    The Quote Status values are based on the transition rules set up in Quoting Forms. The defaulting rules framework is not used for this field.

# Creating Defaulting Rules

Use the following pointers to create defaulting rules.

**Steps**

1. Log in to Oracle Quoting Forms with the Quoting Sales Manager responsibility and

select Defaulting Rules from the Setup functions.

2. Query for *Order Capture* in the Application field.

3. Choose from any of these entities: Quote Header, Quote Line, and Quote Oppty.

Refer the *Order Management Implementation Manual* for detailed steps on creating defaulting rules.

# Changing the Seeded Dependency in Defaulting Rules

Some dependencies are seeded for defaulting rules in the application. See Seeded Mapping Between Trigger and Dependent Attributes, page 5-4 for more details Use this procedure to change the seeded dependency.

**Steps**

1. Login to the Linux/Unix server with appropriate permissions.

2. Make a copy of the *asodepmp.sql* file located in the $ASO_TOP/patch/115/sql/ folder.

3. Open the file (copy) and search for the line that has the trigger attribute name followed by the dependent attribute name on the following line.

4. Change the value of the *Enabled_Flag* from *N* to *Y*.

   This example enables the dependency between Order Type (trigger attribute) and Shipment Priority code (dependent attribute).

   ```
   l_Dep_Rec(l_count).Trigger_Attribute_Name := 'Q_ORDER_TYPE_ID';
   l_Dep_Rec(l_count).Dependent_Attribute_Name :=
   'Q_SHIPMENT_PRIORITY_CODE';
   l_Dep_Rec(l_count).Enabled_Flag := 'Y';
   ```

5. Save your changes and run the modified *asodepmp.sql* script with the apps user responsibility.

6. Login to Oracle Forms with the Quoting Sales Manager responsibility.

7. Create a defaulting rule for the dependent attribute in Step 4 above. If a defaulting rule already exists and is enabled, you can skip this step. For information on creating defaulting rules, see Creating Defaulting Rules, page 5-11.

8. Run the Order Capture Dependency Generator and Defaulting Generator concurrent programs. See Concurrent Programs in Defaulting Rules, page 5-12 for more details.

# Concurrent Programs in Defaulting Rules

There are two concurrent programs that affect the functioning of defaulting rules in

Oracle Quoting. If you add a rule and change the dependency, it is recommended that the concurrent programs run in the following sequence:

- Defaulting Generator concurrent program, page 5-13

- Order Capture Dependency Generator concurrent program, page 5-13

## Defaulting Generator Concurrent Program

To generate defaulting rules for the first time or update existing defaulting rules or defaulting conditions, you must submit the Defaulting Generator concurrent program. New or modified rules and conditions are not effective until the program is successfully run.

> **Note:** Seeded defaulting rules can be disabled, but not modified. If you wish to modify a seeded defaulting rule, disable the seeded defaulting rule condition, and then create a copy of the seeded defaulting rule and include your changes in the copied defaulting rule.

The concurrent program must be submitted if you perform either of the following:

- Add or update a defaulting rule

- Enable or disable a defaulting rule

- Add or update a defaulting condition template

- Enable or disable a defaulting condition template

**Notes**
- Log in to Oracle Forms with the Quoting Sales Manager responsibility and navigate to the Concurrent Requests form from the View > Requests menu.

- Application

  Select Order Capture.

- Entity

  Select either Quote Header, Quote Line or Quote Oppty depending on which entity you have modified.

- Attribute

  Select an attribute from the list.

## Order Capture Dependency Generator Concurrent Program

This concurrent program updates the dependencies between Quoting Attributes. If you

modify attribute dependencies, they are not effective until this concurrent program is successfully executed. The concurrent program must be executed if you perform any of the following:

- Disable a dependency between two attributes

- Enable a dependency between two attributes

If you modify the dependency between two Quote Header level attributes, run this concurrent program for the Quote Header. If you modify the dependency between two Quote Line level attributes, run this concurrent program for the Quote Line.

**Notes**

- Login to Oracle Forms with the Quoting Sales Manager responsibility and navigate to the Concurrent Requests form from the View > Requests menu.

- Database Object Name

  Select either Quote Header ( ASO_AK_QUOTE_HEADER_V ) or Quote Line ( ASO_AK_QUOTE_LINE_V )

- Primary Key Column Name

  Select Q_QUOTE_HEADER_ID if you chose Quote Header as the Database Object Name or L_QUOTE_LINE_ID if you chose Quote Line as the Database Object Name.

- Last Update Date Column Name

  Select Q_LAST_UPDATE_DATE if you chose Quote Header as the Database Object Name or L_LAST_UPDATE_DATE if you chose Quote Line as the Database Object Name.

# Seeded API Signature for the PL/SQL Source Type

You can create a custom API for the PL/SQL API source type. Here is the signature of the seeded PL/SQL API:

```
<API Name>
( p_database_object_name in VARCHAR2,
  p_attribute_code           in  VARCHAR2 )
return <datatype>
where the <datatype> can be NUMBER or VARCHAR2.
```

The table below describes Quoting entities, their associated entity code, and the database object that is called when the entity is processed within a Quoting transaction.

*Processing Entities in a Quoting Transaction*

| Entity | Entity Code | Database Object |
|--------|-------------|-----------------|
| Quote Header | QUOTE_HEADER | ASO_AK_QUOTE_HEADER_V |
| Quote Line | QUOTE_LINE | ASO_AK_QUOTE_LINE_V |
| Quote Oppty | QUOTE_OPPTY | ASO_AK_QUOTE_OPPTY_V |

Here is the sample code to default the Currency Code from the Quote Price List in a standalone quote or from the Price List in the Create Quote from Opportunity page:

```
FUNCTION Get_Currency_from_pricelist(
            P_Database_Object_Name    IN    VARCHAR2,
            P_Attribute_Code          IN    VARCHAR2
            ) RETURN VARCHAR2
is
    Cursor C_currency_code(q_price_list_id Number) is
    SELECT currency_code
    FROM qp_price_lists_v
    WHERE price_list_id = q_price_list_id;
    l_price_list_id     Number;
    l_currency_code     C_currency_code%rowtype;
Begin
  -- Getting the defaulting global record based on the Database object
name

    IF p_database_object_name = 'ASO_AK_QUOTE_HEADER_V' THEN
        l_price_list_id :=
ASO_QUOTE_HEADER_DEF_HDLR.g_record.q_price_list_id;
    ELSIF p_database_object_name = 'ASO_AK_QUOTE_OPPTY_V' THEN
        l_price_list_id :=
ASO_QUOTE_OPPTY_DEF_HDLR.g_record.o_price_list_id;
    END IF;

    -- Getting the Currency Code based on the Price List

    open C_currency_code(l_price_list_id);
    fetch C_currency_code into l_currency_code;
    close C_Currency_code;

    -- Returning the Currency Code

    RETURN l_currency_code.currency_code;
EXCEPTION
    -- Exception Handling
    WHEN NO_DATA_FOUND THEN
        RETURN NULL;
   WHEN OTHERS THEN
    IF OE_MSG_PUB.Check_Msg_Level (OE_MSG_PUB.G_MSG_LVL_UNEXP_ERROR)
    THEN
        OE_MSG_PUB.Add_Exc_Msg
        (     G_PKG_NAME            ,
            ' Get_Currency_from_pricelist '
        );
    END IF;
    RAISE FND_API.G_EXC_UNEXPECTED_ERROR;
End Get_Currency_from_pricelist
```

# 6

## Setting Up Web Publishing

This chapter covers the following topics:

- Overview of Web Publishing
- Enabling Web Publishing
- Setting Up a Specialty Site
- Customizing Publish Notifications

## Overview of Web Publishing

Web publishing functionality allows sales representatives to publish quotes to customers through Oracle *i*Store specialty sites.

### Validations

When a sales representative publishes a quote to *i*Store, an *i*Store API validates the published quote and returns exception messages to Quoting if the attempt to publish is not successful.

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

- Shipping Method on the minisite

- Payment Method on the minisite (referred to as **payment type** on the quote)

    **Note:** Line level payment method is not enforced.

- Payment Threshold on the minisite

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

# Enabling Web Publishing

Use of web publishing functionality in Quoting Forms is controlled by the profile option *ASO: Enable Web Publishing*. For more information on Quoting profile options, see Appendix A "Profiles in Oracle Quoting", page A-1.

In Quoting HTML, you must enable the web publishing functionality by exposing various fields related to web publishing using OA Personalization. See Web Publishing, page 4-52 in the OA Personalization section.

> **Caution:** If a quote is Web Published or if an Oracle iStore user requests for a sales representative's assistance, then the user cannot change the Customer Name.

You must also set the profile *IBE: iStore Non Secure URL* to *iStore URL* at the application level. See Profiles in Oracle Quoting, page A-1 for more information.

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

# Setting Up a Specialty Site

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

# Customizing Publish Notifications

You can customize publish notifications based on Organization ID, Minisite ID, and User Type. You can still use the *i*Store Merchant UI to configure Quoting notifications. Refer to the *Oracle iStore Implementation and Administration Guide* for more information.

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

- FND user registration — ASOQOTPUBLISHREG

- Publish executable quote — ASOQOTPUBLISHEXEC

- Publish non-executable quote — ASOQOTPUBLISHUNEXEC

To customize these notifications, you must:

1. Create a lookup for the merchant UI

2. Customize notification

3. Add a new message in the work template file

### Create a lookup for the merchant UI:

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

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

- ASOQOTPUBLISHREG

- ASOQOTPUBLISHEXEC

- ASOQOTPUBLISHUNEXEC

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

*Example Set Up of Lookup Codes for Lookup Type IBE_WF_NOTIFICATION*

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

### Customize the Notification:

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

Login to the JTF Login Page with the IBE_ADMIN responsibility.

Navigate to Menu > Notifications.

### Adding a new message in the work template file:

*i*Store uses a workflow item type *i*Store Alerts Workflow as the placeholder for *i*Store

notification templates.

**Notes**

- Choose the item type *i*Store Alerts Workflow.

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

# 7

# Integrating Oracle Quoting With Oracle Approvals Management

This chapter covers the following topics:

- Setting Up Approvals Functionality

## Setting Up Approvals Functionality

> **Important:** It is recommended that you implement quote approvals if you enabled Sales Contracts integration.

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

1.  Set up all Approvals quote statuses.

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

    - Draft to Approval Pending

    - Approved to Order Submitted

    - Approval Rejected to Approval Pending

    - Approval Canceled to Approval Pending

2.  Set the Approvals profile options.

    For information on the Approvals profile options, refer to Appendix A, "Profiles in Oracle Quoting", page A-1.

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

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

The seeded attributes for Quoting are available in Appendix E Seeded Attributes in Oracle Approvals Management (OAM), page E-1.

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

# 8

# Integrating Oracle Quoting With Oracle Sales Contracts

This chapter covers the following topics:

- Overview of Quoting/Sales Contracts Integration
- Contract Terms Library Setup
- Authoring Contract Terms
- Validation of Contract Terms
- Printing Quotes With Contract Terms
- Enabling Sales Contracts Functionality

## Overview of Quoting/Sales Contracts Integration

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

- Create quotes with standard contract terms from a contract template

  > **Note:** Oracle Quoting supports only Contract templates created with the document type Quote.

- Add or remove pre-approved standard contract terms

- Create non-standard contract terms

- Use Contract Expert to bring in additional terms based on pre-defined policy rules

- Download contract terms to a Microsoft Word document, modify it offline, and

upload the modified document to the system

- 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

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

  - For complete information on Oracle Sales Contracts, please refer the *Oracle Sales Contracts Implementation and Administration Guide*.
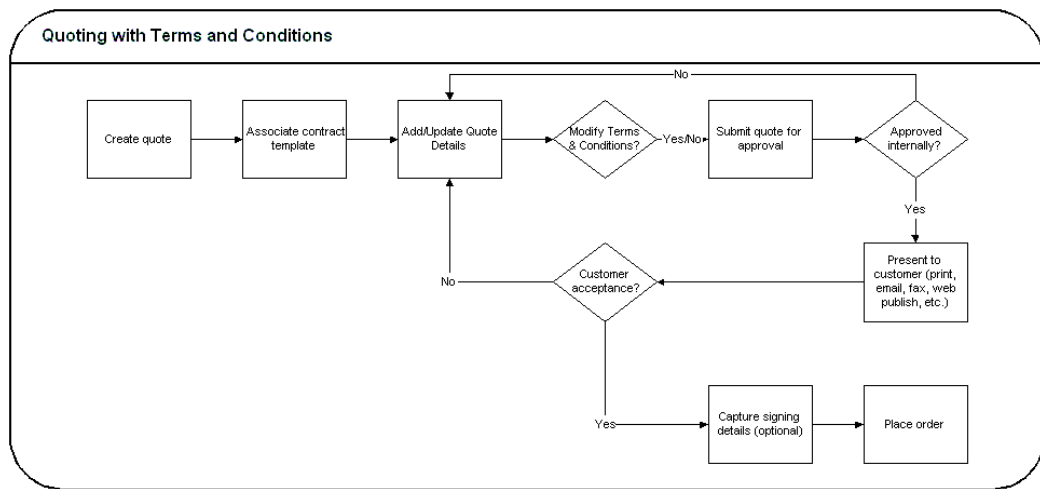


## Contract Terms Library Setup

Clauses and contract templates are created and approved within the contract terms library. Clauses are added and organized in contract templates, that are then approved for use, and assigned to a quote. Assigning a contract template to a quote begins the contract terms negotiation. Refer to the *Oracle Sales Contracts Implementation and Administration Guide* for details on the contract terms library.

The contract terms library supports the following:

- Creating and managing the standard clauses in your organization that form the basis of your contract negotiations on a quote

- Ability to assemble these standard clauses on templates including controlling whether these clauses need to be mandatory when applied on a contract

- Ability to create and manage corporate policy rules that drive additional clause selection on quotes as well as identifying any policy deviations from standards on a quote

Please refer the *Oracle Sales Contracts Implementation and Administration Guide* for the clause variables that are available when authoring clauses.

# Authoring Contract Terms

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

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

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

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

To update contract terms:

- You must use the highest version of the quote

- The quote must not be expired

- The quote must not be submitted for batch pricing

- The quote must not be of status Order Submitted

- You must have update access to the quote

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

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

page.

## Validation of Contract Terms

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

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

- Clauses that are no longer effective

- Two or more clauses that are incompatible

- Clauses that do not have values substituted for clause variables

- Clauses that have newer versions available

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

- Approval Submission

- Print Quote

- Web Publishing a quote (with contract terms) to *i*Store

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 *Oracle Sales Contracts Implementation and Administration Guide*.

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

## Printing Quotes With Contract Terms

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

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

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

The printed terms on the quote include:

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

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

For more information on the Print Quote, refer to Setting Up the Print Quote Functionality, page 4-20. For more information on Print Quote profile options, refer to Profile Options for Printing, page A-22.

# Enabling Sales Contracts Functionality

You can invoke an approval rule if Contract Source = *Attached Document* and the contract attachment has a Category having the *Contract* value.

To implement the approval rule, enable the approval attribute *Contract Terms Source*. It is a non-mandatory header attribute. The attribute determines if the Terms and Conditions on the quote are derived from an attached document.

To enable sales contracts functionality in Oracle Quoting, you must perform the following:

## Set Sales Contracts profile values:

To enable the Sales Contracts functionality in Oracle Quoting, set the profile option *OKC: Enable Sales Contracts* to *Yes*. For more information on profile options, refer to Appendix A "Profiles in Oracle Quoting", page A-1 and the *Oracle Sales Contracts Implementation and Administration Guide*.

## Set up Oracle Quoting profile options:

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

- ASO: Default Layout Template

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

For more information on setting Oracle Quoting profile options, refer to Appendix A "Profiles in Oracle Quoting", page A-1.

## Set Up Approvals Rules:

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

- Clause Changes from the Contract Template — Clauses manually added/removed from a Quote or new clauses added to a template after instantiation. Possible values are:

  - NO_CHANGE — No change from template

  - ARTICLES_CHANGED — Clauses changed from template

- Non-Standard Terms — Clauses that have been newly authored or standard clauses modified from the contract library. Possible values are:

  - NONE — No clauses exist

  - ONLY_STANDARD — Only standard clauses exist

  - NON_STANDARD — Contains non-standard clauses

- Contract Terms Source

  Determines if the Terms and Conditions on the quote are derived from structured terms or an attached document.

- Contract Authoring Party

  Determines whether the Terms and Conditions have been authored internally or by the customer.

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

For information on approval attributes, see Appendix E Seeded Attributes in Oracle Approvals Management, page E-1.

# 9

# Integrating Oracle Quoting With Oracle Incentive Compensation

This chapter covers the following topics:

- Overview of OIC Integration
- Setting Up Sales Credit Allocation
- Seeded Attributes
- Setting Up Projected Commission Calculation

## Overview of OIC Integration

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

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

## Sales Credit Allocation

Sales credit allocations take place when requested by the user and/or at order submission, depending on the value of the profile option *ASO: Automatic Sales Credit Allocation*. Refer to Appendix A "Profiles in Oracle Quoting", page A-1 for more information.

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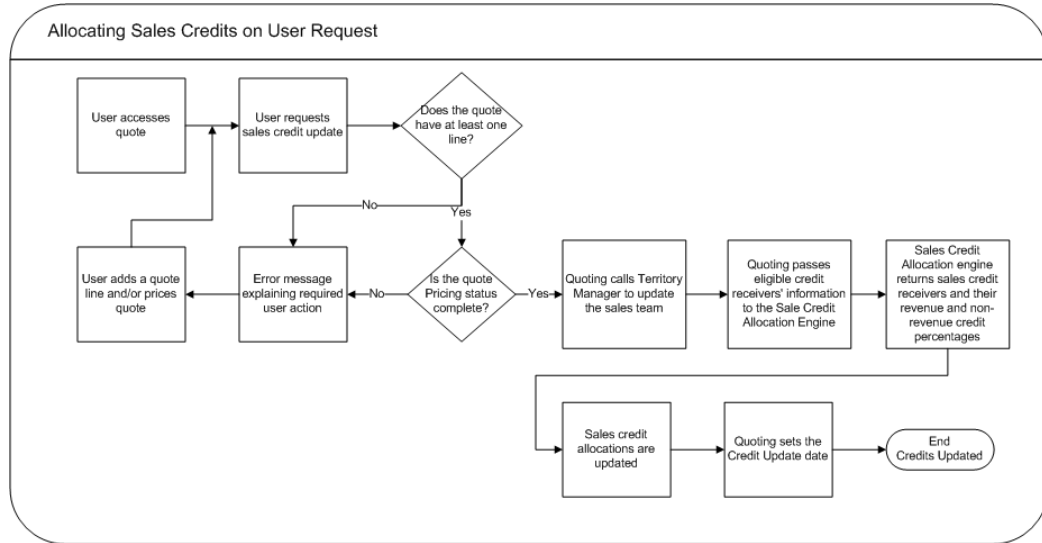
When allocating sales credit, you can determine if sales credit allocation takes place at the header level or header and line level. Upon sales credit update request, Quoting calls Territory Manager to update the sales team. The eligible resources and their roles are then passed to OIC. The sales credit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

> **Note:** You can also use an external credit engine for sales credit allocations. See Setting Up Sales Team Assignment and Sales Credit Allocation, page 4-19 for more information.

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

- Transaction Source — Oracle Quoting

- Resource ID — for each eligible credit receiver

- Role ID — for each eligible credit receiver

- Date — SYSDATE

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

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

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

the winning credit rule.

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

### Eligibility

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

- Be a valid sales representative

- Be on the quote's sales team

- Have a specified role on the sales team. Only roles of type Sales, TeleSales, or Partners Relationship Management can be specified on the sales team.

### Sales Credit Allocation Rules

You can define sales credit allocation rules in OIC to determine how sales credit percentages are distributed. Oracle Incentive Compensation seeds certain attributes for the Oracle Quoting transaction source. Attributes are used to determine which credit rule is applied. See Seeded Attributes, page 9-5 for a complete list of seeded attributes.

## Projected Commission

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

- An entire quote

- Each quote line

- Each product category

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

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

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

- The quote will be placed as an order today
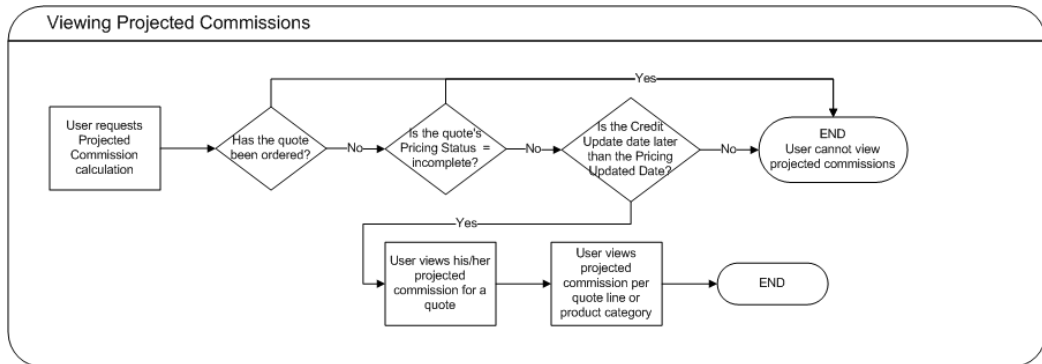


Quoting passes the following information to OIC for each quote line:

- Resource ID

- Product ID

- Date

- Currency Code of quote

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

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

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

# Setting Up Sales Credit Allocation

> **Important:** Automatic sales team assignment must be set up and

enabled to use sales credit allocation. The profile option *ASO: Automatic Sales Team Assignment* must be set to *Partial* or *Full*.

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

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

1. Set the sales credit allocation profile options.

   For information on the sales team assignment profile options, refer to Appendix A, "Profiles in Oracle Quoting", page A-1

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

   When setting up credit rules, ensure that:

   1. Credit rules' attributes and roles in OIC are synchronized with territories' qualifiers and roles in Territory Manager. For example, if the Territory Manager set up assigns the Sales Role to quotes for the customer Business World, then credit rules with Business World selected for the attribute Customer Name should assign credit for this role.

   2. For credit rules with the Transaction Source - Oracle Quoting, only the following role types should be assigned sales credit:

      - Sales

      - TeleSales

      - Partners Relationship Management

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

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

## Seeded Attributes

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

*OIC Seeded Attributes for the Oracle Quoting Transaction Source*

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

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

| Attribute | Header and/or Line Level | Description |
|-----------|--------------------------|-------------|
| Country | Both | Country in quote-to customer party site address |
| Postal Code | Both | Postal code in quote-to customer party site address |
| Campaign | Both | Campaign selected for quote. |
| Sales Channel | Both | Sales channel selected for quote |

# Setting Up Projected Commission Calculation

> **Important:** Automatic sales team assignment and sales credit allocation
> must be enabled to use the projected commission functionality. *ASO:*
> *Automatic Sales Team Assignment* and *ASO: Automatic Sales Credit*
> *Allocation* must be set to *Full* or *Partial*.

To implement the projected commission functionality, perform the following steps:

1. Set the projected commission profile option.

   For information on the sales team assignment profile options, refer to Appendix A,
   "Profiles in Oracle Quoting", page A-1.

2. The OIC Administrator must create a compensation plan that includes plan
   elements possessing formulas with forecasting expressions.

3. The OIC Administrator must assign an OIC compensation plan to a sales
   compensation role.

4. The OIC Administrator must assign a sales compensation role to the sales
   representative. The sales representative will inherit the compensation plan from the
   sales compensation role.

5. The OIC Administrator must design the Projection Classification rule set and
   synchronize the rule set so that the quote lines can be classified for calculation.

# 10

# Integrating Oracle Quoting With Oracle Territory Manager

This chapter covers the following topics:

- Overview of Territory Manager Integration
- Setting Up Sales Team Assignment Functionality
- Territory Qualifiers Supported by Oracle Quoting

## Overview of Territory Manager Integration

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

If and when automatic sales team assignment takes place is determined by the profile option *ASO: Automatic Sales Team Assignment*. See Appendix A, "Profiles in Oracle Quoting", page A-1 for more information.

Assigning the Initial Quote Sales Team



Reassigning the Sales Team on User Request
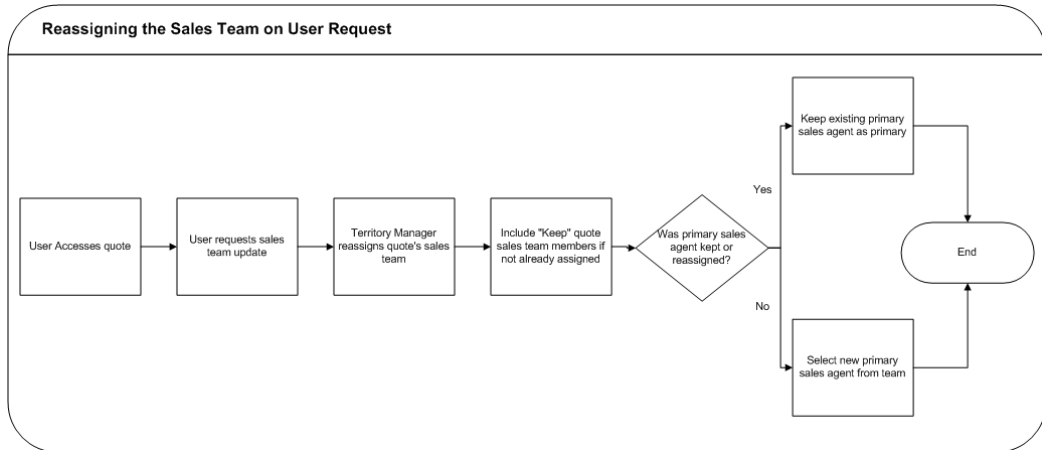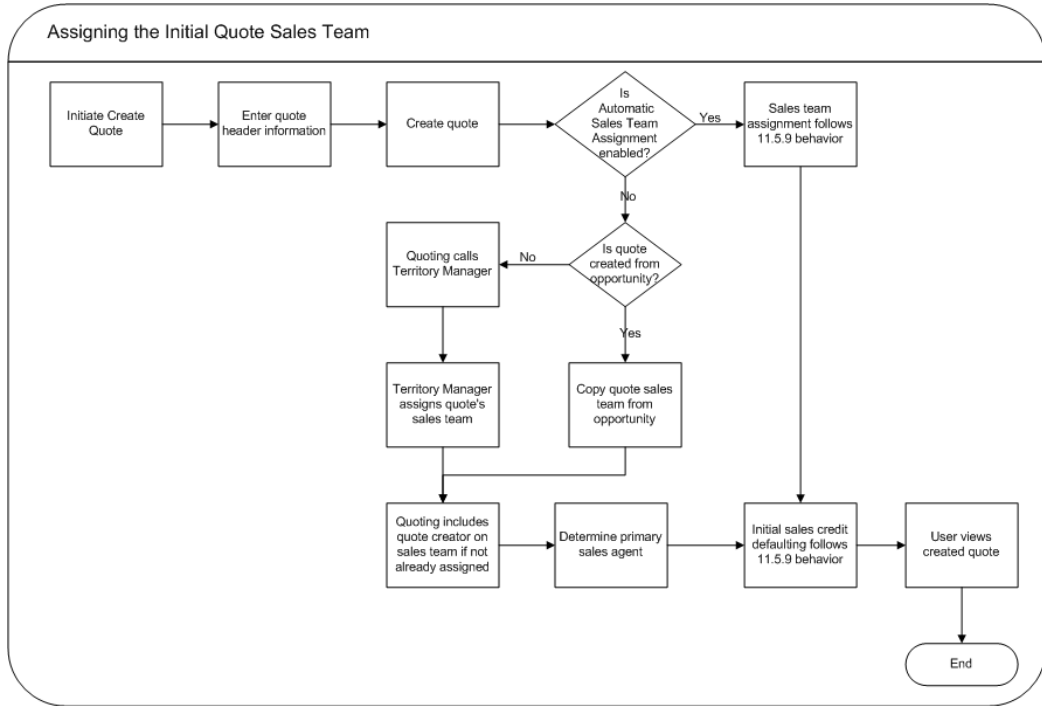
Quoting calls Territory Manager to determine the appropriate sales team, including the following information for each resource:

- Resource

- Group (of usage Sales or TeleSales for sales representative resources)

- Role — Quoting will only display roles in the sales team information if automatic sales team assignment and automatic sales credit allocation are both implemented. Only roles of role type Sales, TeleSales, and Partners Relationship Management will be displayed in the application and used to calculate sales credit allocations.

- Territory ID

- Full Access Flag

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

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

> **Note:** If enabled, sales team assignment also applies for *i*Store carts for which sales representative assistance is requested.

## Primary Sales Agent Assignment

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

- If the quote creator is a valid sales representative, the quote creator becomes the primary sales representative.

- If the quote creator is not a valid sales representative, the primary sales agent is selected randomly from the valid sales representatives on the sales team who have the Full Access flag selected.

- If there are no valid sales representatives on the sales team with full access, the primary sales agent defaults from the Quoting parameter *Default Salesrep*. This resource is added to the sales team with the Full Access flag selected.

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

criteria, the primary sales agent defaults from the Quoting parameter *Default Salesrep*.

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

# Setting Up Sales Team Assignment Functionality

When setting up territories, use the following information:

- Usage: *Oracle Sales and TeleSales*

- Transaction type: Territory Manager has a seeded transaction type for Quoting called *Quote*.

- Transaction qualifiers: Use the transaction qualifiers listed in Territory Qualifiers Supported by Oracle Quoting, page 10-5 to set up rules for assigning transaction types.

- Resources: Use Employee resources, as these are currently the only resource types supported in Oracle Quoting.

To implement the sales team assignment functionality using Oracle Territory Manager, complete the following setup steps:

1. Set the sales team assignment profile option.

   For information on the sales team assignment profile option, refer to Appendix A, "Profiles in Oracle Quoting", page A-1

2. Set up territories in Oracle Territory Manager.

3. Schedule the Accesses concurrent program to run. 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.

   When this concurrent program runs, Oracle Quoting will call Territory Manager to reassign sales teams on quotes which meet the program parameters. The program will retain members who had the 'Keep' flag selected in the same sales team.

   If the Primary Sales Agent is removed from the sales team, Oracle Quoting will select a new Primary Sales Agent randomly from the existing members in the sales team. If none of the members are valid sales representatives with full access or if all members are removed from the team as a result of running the concurrent program, Quoting will default the Primary Sales Agent from the parameter *Default Salesrep*. If the Primary Sales Agent is defaulted using this parameter, the role is defaulted using the *Default Sales Role* parameter.

The following are the details of the concurrent program:

*Accesses Concurrent Program Details*

| Parameter Name | Possible Values | Default Value | Description |
|---|---|---|---|
| Mode | New<br><br>Total | | New applies only to quotes which have been updated since the program was last run and Total is for all quotes. |
| Exclude Ordered Quotes | Yes<br><br>No<br><br>Blank | Yes, if set to Blank | All quotes in the Ordered status are excluded |
| Exclude Expired Quotes | Yes<br><br>No<br><br>Blank | Yes, if set to Blank | All quotes in the Expired status are excluded |
| Additional Where Clause | - | Null | Use this parameter to include a specific condition for the concurrent program. For example, if you want to assign territories only for specific quotes, you can enter a SQL statement with the specific condition. Can be used to enhance performance. |

The Territory Manager performs mass updates to the quotes based on the parameters set in the concurrent program. Quotes meeting the following criteria qualify for this update:

• Quotes with a source code of Order Capture

• Shopping carts converted to quotes via the Request Sales Assistance flow

4. Set up the Quoting parameter *Default Salesrep*.

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

# Territory Qualifiers Supported by Oracle Quoting

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

Quoting.

*Territory Qualifiers for Setting up Territory Assignment Rules in Quoting*

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

| Usage | Type | Territory Qualifier | Description |
|-------|------|---------------------|-------------|
| Sales | Account | Customer Name | Name of quote-to customer party (person or organization) |
| Sales | Account | Customer Name Range | Range of names of quote-to customer parties (person or organization) |
| Sales | Account | Number of Employees | Total employees in quote-to customer party's organization |
| Sales | Account | Postal Code | Postal code in quote-to customer party site address |
| Sales | Account | Province | Province in quote-to customer party site address |
| Sales | Account | SIC Code | SIC code of quote-to customer party |
| Sales | Account | State | State in quote-to customer party site address |

# A

# Profiles in Oracle Quoting

This appendix covers the following topics:

- Setting System Profile Options
- Profile Categories
- Profile Options for Enabling Quote Features
- Profile Options for Functional Security
- Profile Options for Order Conversion
- Profile Options for Payments
- Profile Options for Pricing
- Profile Options for Printing
- Profile Options for Product, Quote Searches
- Profile Options for Sales Credits
- Profile Options for Data Security
- Profile Options for Defaulting
- Profile Options for Debug
- Profile Options for ATP
- Profile Options for Credit Check
- Profile Options for Customers
- Profile Options for Configuring the User Interface
- Additional Profiles for Quoting Setup and Integration
- Oracle Pricing Profile Options for Quoting
- Oracle Quoting Obsoleted Profiles

# Setting System Profile Options

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

- If you are using Quoting Forms UI standalone, you should set profile options for Order Capture at the Application level.

- If you are using Quoting Forms UI with Oracle TeleSales, you should set profile options for TeleSales at the Application level.

- If you are using Quoting HTML UI standalone, you should set profile options for Oracle Quoting at the Application level.

- If you are using Quoting HTML UI with Oracle Sales, you should set profile options for Oracle Sales at the Application level.

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

Log in to Oracle Forms as a Systems Administrator.

Navigate to the Profile > System > Find System Profile Values window.

> **Tip:** When you query for ASO profiles, use the string with a wildcard as in the following example: *ASO%<profile name>*.

# Profile Categories

Profiles in Oracle Quoting are categorized based on functions in the application that they are applicable to. The profiles in this appendix are organized based on these categories. You can also view these categories in the application.

**Steps**

1. Log in to Self Service Applications with the Functional Administrator responsibility.

2. From the Applications Administration page, navigate to Core Services > Profile Categories.

3. Search for profile categories in Quoting by selecting Order Capture in the Application field.

# Profile Options for Enabling Quote Features

Set the following profiles to enable respective features in Oracle Quoting.

### ASO: Automatic Sales Credit Allocation

Determines if and when Quoting calls the sales credit allocation engine to get sales credit receivers and percentages.

If set to **Full**, Quoting calls the sales credit allocation engine upon user request and at order submission to determine sales credit receivers and percentages, for revenue and non-revenue sales credits. If the *ASO: Automatic Sales Team Assignment* profile is set to *Full*, Quoting will call Territory Manager to update the sales team at order submission before calling the sales credit allocation engine.

If set to **Partial**, Quoting calls the sales credit allocation engine upon user request only.

If set to **None**, Quoting does not call the sales credit allocation engine to determine credit receivers and percentages.

If null, defaults to **None**.

### ASO: Automatic Sales Team Assignment

Determines if and when Quoting calls Territory Manager to assign sales teams to quotes.

If set to **None**, Quoting does not call Territory Manager to assign sales teams.

If set to **Partial**, Quoting calls Territory Manager to assign quote sales teams at quote creation, directly from templates, and on user request. At quote creation from an opportunity, Quoting will copy the sales team from opportunity to quote, but select the primary sales representative according to logic described in the "Integrating Oracle Quoting With Oracle Territory Manager", page 10-1 chapter. If automatic sales credit allocation is enabled, Quoting calls Territory Manager when the user requests sales credit update.

If set to **Full**, Quoting calls Territory Manager to assign quote sales teams at order submission, in addition to the functionality of the partial setting.

If null, defaults to **None**.

### ASO: Calculate Projected Commission

Determines if projected commission is available in Quoting.

If set to **Yes**, users can request calculation of their projected quote commissions and view the commission per line and product category.

If set to **No**, users cannot request or view projected commission.

If null, defaults to **No**.

### ASO: Enable Approvals

Determines availability of approvals functionality.

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Approvals tab can be enabled/disabled via OA Personalization.

### ASO: Enable Credit Check

Determines if the credit check functionality is enabled.

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

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

If null, defaults to **No**.

### ASO: Enable Defaulting Rule

Determines if the defaulting is based on the OM defaulting framework or not.

- If set to **Yes**, the defaulting rule setup for Quoting is used.

- If set to **No**, the existing hard coded defaulting logic is used.

- If null, the default value of **No** is assumed.

### ASO: Enable *inter*Media Search

Determines if the product search (against the Product Catalog) uses *Inter*media.

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

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

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

> **Note:** This profile is applicable only to Forms Quoting. HTML Quoting uses *inter*Media search by default.
>
> Enter a character and a wildcard to perform the search.

### ASO: Enable Line Level Billing

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

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the *Line Level Billing Details* section can be disabled via OA Personalization.

### ASO: Enable Sales Supplement

Determines if the sales supplement functionality is accessible to users.

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Sales Supplement subtab can be disabled via OA Personalization in the header as well as line levels.

### ASO: Enable Web Publishing

Enables web publishing functionality in Oracle Quoting - Forms

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Web Publish flag can be enabled/disabled via OA Personalization in the header as well as line levels.

### Profiles to Enable Quote Features

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Enable Credit Check | No | Both | Site, Application | Credit Check |
| ASO: Enable Intermedia Search | No | Forms | Site, Application | Product Search |

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Automatic Sales Credit Allocation | None | Both | Site | Sales Credits |
| ASO: Calculate Projected Commission | No | Both | Site, Application | Sales Credits |
| ASO: Enable Defaulting Rule | No | Both | Site, Application, and Responsibility | |
| ASO: Enable Approvals | Yes | Forms | Site, Application | |
| ASO: Enable Line Level Billing | No | Forms | Site, Application, Responsibility | |
| ASO: Enable Sales Supplement | No | Forms | Site, Application | |
| ASO: Enable Web Publishing | No | Both | Site, Application | |
| ASO: Automatic Sales Team Assignment | None | Both | Site | |

# Profile Options for Functional Security

The following profile options apply to functional security in Oracle Quoting.

### ASO: Allow Quantity Updates for Component Item

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

component.

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

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

If null, defaults to **Yes**.

### ASO: Allow Quantity Updates for Top Level Model Item

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

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

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

If null, defaults to **Yes**.

### ASO: Allow Skip Approvers

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the *Skip Approvers* option can be disabled via OA Personalization.

### ASO: Create New Customer

Allows the user to access the Accounts Receivables (AR) Customer page. The AR Customer page can be used to search for an existing customer or create a new customer.

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

If set to **Yes**, the user can access the AR Customer page to search for customers or create new customers.

If set to **No**, the user cannot access the AR Customer page.

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Create Customer button can be disabled via OA Personalization.

### ASO: Discounting Privilege

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

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

If set to **Partial**, the user can only select non-automatic adjustments and charges.

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

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

### ASO: Enable Line Type

Allows the user to enter line types and categories.

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Line Category Code drop-down can be disabled via OA Personalization.

### ASO: Enable Manual Warehouse Selection

Allows the user to specify a warehouse.

If set to **Yes**, the Warehouse field is enabled.

If set to **No**, the Warehouse field is disabled.

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Warehouse LOV can be disabled via OA Personalization.

### ASO: Enable Promotional Good Price Override

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

If set to **Yes**, and if the *ASO: Discounting Privilege* profile is set to *Full*, a user can also

override the price for a promotional good.

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

If null, defaults to **No**.

### ASO: Enable Submit Button

Determines which users can submit orders.

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

If set to **No**, the **Place Order** button in Forms UI and the **Place Order** action in HTML UI is disabled and users cannot submit orders.

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

### ASO: Manager Role Access

Determines what level of access a manager has to quotes.

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

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

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

### ASO: Modify Sales Credits

Allows the user to modify the sales credit recipients.

If set to **Yes**, the user can add/modify/remove sales credit recipients irrespective of whether the user is a manager in the sales group or not.

If set to **Partial**, the user can add/modify/remove sales credit recipients only if they are a member of at least one sales group in which the user is a manager or member of at least one group which is the child group of a group where the user is a manager. If the user is not a manager in any sales group, the user cannot add/modify/remove sales credit recipients.

If set to **No**, the user cannot add/modify/remove sales credit recipients irrespective of whether the user is a manager in the sales group or not.

### ASO: New Quote Security

Controls the user's ability to create new quotes.

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

If set to **No**, the user can create new standalone quotes. They can copy existing quotes to new quotes and create quotes from opportunities.

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

### ASO: OM Access

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

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

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

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

### ASO: Operating Unit Override

This profile determines if the operating unit on a quote can be changed prior to quote creation. Applicable to Forms Quoting only.

- If set to **Yes**, you can change the operating unit for a quote, provided the quote is not already created.

- If set to **No**, you cannot change the operating unit for the quote prior to quote creation.

- If set to null, the default value of **No** is assumed.

### ASO: Price List Override

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

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the Currency and Price List LOVs can be disabled via OA Personalization.

### ASO: Status Override

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

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

> **Note:** The status of a quote accessed from approval notification is read-only and cannot be changed even if the ASO: Status Override profile option is set to Yes.

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

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

### ASO: Update Customer

Allows the user to update existing customer information.

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

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

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, the *Create Contact* and *Create Address* buttons can be disabled via OA Personalization.

### ASO: Update Sales Team

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

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

If set to **Partial**, a user can:

- Add or remove resources from the sales team if the resources are members of at least one of the groups in which the user is a member.

- Add or remove resources from the sales team if the resources are members of at least one child group of a sales group in which the user is a manager.

- Modify sales team information only for those resources where there is a shared membership in at least one sales group or membership in at least one child group of a sales group in which the user is a manager.

If this profile is set to **Partial** and the user is not a member of any sales groups, Quoting behaves as if the profile option is set to **Yes**.

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

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

### ASO: View Sales Credits

Allows the user to view the sales credit recipients.

If set to **Yes**, the user can view all sales credit recipients irrespective of whether the user is a manager in the sales group or not.

If set to **Partial**, the user can view sales credit recipients only if they are a member of at least one sales group in which the user is a manager or member of at least one group which is the child group of a group where the user is a manager. If the user is not a manager in any sales group, the user can view only his/her own sales credits.

If set to **No**, the user can view only his/her own sales credits irrespective of whether the user is a manager in the sales group or not.

### Profiles for Functional Security

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Create New Customer | Yes | Forms | Site, Application, Responsibility, User | Customers |
| ASO: Enable Submit Button | Yes | Both | Site, Application, Responsibility, User | Order Conversion |
| ASO: Discounting Privilege | None | Both | Site, Application, Responsibility, User | Pricing |
| ASO: Price List Override | Yes | Forms | Site, Application, Responsibility, User | Pricing |
| ASO: Modify Sales Credits | Yes | Both | Site, Application, Responsibility, User | Sales Credits |
| ASO: View Sales Credits | Yes | Both | Site, Application, Responsibility, User | Sales Credits |

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Manager Role Access | Inherit | Both | Site, Application, Responsibility, User | |
| ASO: Allow Quantity Updates for Component Item | Yes | Both | Site, Application | |
| ASO: Allow Quantity Updates for Top Level Model Item | Yes | Both | Site, Application | |
| ASO: Allow Skip Approvers | No | Forms | Site, Application | |
| ASO: Enable Line Type | No | Forms | Site, Application, Responsibility, User | |
| ASO: Enable Manual Warehouse Selection | No | Forms | Site, Application, Responsibility, User | |
| ASO: Enable Promotional Good Price Override | No | Both | Site | |
| ASO: New Quote Security | No | Both | Site, Application, Responsibility, User | |

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Status Override | No | Both | Site, Application, Responsibility, User | |
| ASO: Update Sales Team | Yes | Both | Site, Application, Responsibility, User | |
| ASO: Operating Unit Override | No | Forms | Site, Application, Responsibility, User | |
| ASO: OM Access | Full | Forms | Responsibility, User | |
| ASO: Update Customer | Yes | Forms | Site, Application, Responsibility, User | Customers |

# Profile Options for Order Conversion

The following profile options apply to converting quotes to orders.

### ASO: Default Order State

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

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

### ASO: Default Return Reason

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

Mandatory for all return lines.

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

### ASO: OM Defaulting

Determines whether Oracle Order Management should default values based on Oracle

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

- agreement_id

- fob_code

- freight_terms_code

- packing_instructions

- payment_term_id

- shipment_priority_code

- shipping_instructions

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

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

### ASO: Order Feedback Queue Retention Time

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

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

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

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

### ASO: Quote Conversion Type

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

If null, no default value is assumed.

### ASO: Reservation Level

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

Mandatory if reservations are performed.

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

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

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

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

## ASO: Validate Salesrep

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

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

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

If null, a default value of Yes is assumed.

## Profiles for Order Conversion

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

| Profile Option | Default Value | HTML or Forms UI | Application Level |
|---|---|---|---|
| ASO: Reservation Level | Manual | Both | Site, Application, Responsibility, User |
| ASO: Validate Salesrep | Yes | Both | Site, Application, Responsibility, User |

# Profile Options for Payments

The following profile options apply to payments.

### ASO: Credit Card Authorization

> **Important:** In this release, the behavior of the *ASO: Credit Card Authorization* profile has changed.

This profile, working along with the profile *ASO: Default Order State*, determines whether credit card authorization must be performed on orders created in the *Entered* status.

To enable credit card authorization for orders created in the *Entered* status, this profile must be set to **Yes** and ASO: Default Order State must be set to **Entered**.

To disable credit card authorization for orders created in the *Entered* status, this profile must be set to **No** and the *ASO: Default Order State* profile must be set to **Entered**.

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

### ASO: Enable Line Level Payments

Determines whether line level payments must be enabled in the Forms UI.

If set to **Yes**, the *Payment Type* field at the line level payment region is enabled for updates. Based on the payment type chosen, the following fields are also enabled:

- Check Number

- Card Type

- Credit Card Number

- Security Code

- Cardholder Name

- Credit Card Expiration Date

Is set to **No**, the Payment Type field and all related payment fields are disabled.

- Payment Terms, PO Number and PO Line Number fields are available for update independent of this profile setting.

- In HTML UI, use OA Personalization to enable/disable payment related fields at the line level.

### ASO: Enable Risk Management on Credit Card Authorization

Runs risk management during a credit card authorization.

If set to **Yes**, risk management check is enabled when performing a credit card authorization.

If set to **No**, risk management check is disabled.

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

### Profiles for Payments

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Credit Card Authorization | No | Both | Site, Application, Responsibility, User | Enable Quote Features |
| ASO: Enable Line Level Payments | Yes | Forms UI | Site, Application, Responsibility, User | Enable Quote Features |
| ASO: Enable Risk Management on Credit Card Authorization | No | Both | Site, Application, Responsibility, User | Enable Quote Features |

# Profile Options for Pricing

The following profile options apply to pricing of quotes in Oracle Quoting.

### ASO: Default Price Change Reason

When you change the price without entering a change reason, the value in this profile defaults as the change reason. The values for this profile are derived from the Oracle Order Management lookup type CHANGE_CODE.

If this profile is not set, a default value of **Null** is assumed.

### ASO: Enable Batch Processing

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

> **Note:** This profile is applicable only in the Forms UI. In the HTML UI, using OA Personalization, you can enable the *Submission Options* field to price the quote in batch mode.

### ASO: GSA Pricing

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

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

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

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

If null, GSA violation checks are ignored.

### ASO: Pricing Change Alert

Dictates whether a message is displayed notifying a price affecting change made to the quote. Irrespective of the setting for this profile, the quote is already priced.

If set to **Yes**, the notification is displayed.

If set to **No**, the user does not get a notification.

If set to null, the default value **Yes** is interpreted.

## Functional Behavior

If the profile *ASO: Price Change Alert* is set to *Yes* AND

1. Automatic Pricing and Automatic Tax are set AND

2. The Pricing and Tax status are 'Incomplete' OR the Pricing Status is 'Complete' and the Tax status is 'Incomplete' OR a Price affecting change is pending AND

3. The user attempts to initiate the following:

   Quote Header Actions:

   - Place Order

   - Web Publish Quote

   - Print Quote

   Sub-Tab Actions:

   - Initiate Approval

   - Create Proposal

The Quote is repriced and the user is presented with a message indicating that a price affecting change has been made. The Price and Tax status is Complete at this point.

If the *ASO: Price Change Alert* profile is set to *No* AND

1. Automatic Pricing and Automatic Tax are set AND

2. The Pricing and Tax status are 'Incomplete' OR the Pricing Status is 'Complete' and the Tax status is 'Incomplete' OR a price affecting change is pending AND

3. The user attempts to initiate the following:

   Quote Header Actions:

   - Place Order

   - Web Publish Quote

   - Print Quote

   Sub-Tab Actions:

   - Initiate Approval

- Create Proposal

The Quote is repriced and the user is not presented with any message indicating that a price affecting change has been made.

### ASO: Require Minus Sign For Manual Discount

Determines the format for entering manual discounts and surcharges for quotes in the HTML interface. The fields that have a direct impact by the value in this profile are: *Discount %* in the Quote Header, *Value* in the Quote Line, *Discount %* when you update multiple products.

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

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

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

### Profiles for Pricing

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Enable Batch Processing | No | Forms | Site | Enable Quote Features |
| ASO: Pricing Change Alert | Yes | Both | Site, Application, Responsibility | |
| ASO: GSA Pricing | N/A | Both | Site, Application | |
| ASO: Require Minus Sign For Manual Discount | No | HTML | Site | |
| ASO: Default Price Change Reason | Null | Both | Site | |

# Profile Options for Printing

The following profile options apply to printing quotes from Oracle Quoting.

## ASO: Company Report Logo

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

### Profiles for Printing

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| ASO: Company Report Logo | N/A | Both | Site, Application, Responsibility |

# Profile Options for Product, Quote Searches

The following profile options apply to product and quote searches in Oracle Quoting.

## ASO: Category Set

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

• Searching the product catalog

• Searching for trade-in products

• Reconfiguring a product from the Installed Base

• Specifying service reference information for a serviceable item in the Installed Base or Product Catalog

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

• Searching the product catalog (with *inter*Media enabled)

• Searching for trade-in products

• Reconfiguring a product from the Installed Base

• Specifying service reference information for a serviceable product in the Installed Base or on a Pending Order.

- Specifying service reference information for a serviceable product in the product catalog

Additionally, category set is used in the following instances:

- To Print Subtotals by Category when printing a quote

- To display Subtotal by product category for Projected Commissions

- For the categories used to set up Territory Management

- For the Product LOV in the set up screen for Sales Credit Allocation

- For the seeded product category attribute in Quote approvals setup

If the profile is null, it will use the default category set for the Order Management functional area.

### ASO: Filter Service Reference by End Customer

Filter the service references by End Customer.

If set to **Yes**, the service references are filtered by End Customer. If the End Customer is not specified, it is filtered by the Quote To Customer

If set to **No**, the service references are filtered by Quote To Customer.

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

### ASO: Maximum Days In Expiration Date Range

For performance reasons, the maximum number of days in the Expiration Date Range should be restricted during quote searches. The value in this profile will be defaulted into the Expiration Date Range field.

- If null, a default value of 30 is assumed.

### ASO: Require Service Reference on Add to Quote

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

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

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

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

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

**Profiles for Product and Quote Searches**

| Profile Option | Default Value | HTML or Forms UI | Application Level |
|---|---|---|---|
| ASO: Category Set | NA | Both | Site, Application |
| ASO: Require Service Reference on Add to Quote | Yes | Both | Site |
| ASO: Filter Service Reference by End Customer | No | Both | Site, Application, Responsibility |
| ASO: Maximum Days in Expiration Date Range | 30 | HTML | Site, Application, Responsibility, User |

# Profile Options for Sales Credits

The following profile options apply to sales credits.

### ASO: Run Sales Credit Update for Quote Lines

Determines whether a call to the sales credit allocation engine updates the entire quote or just the header.

> **Note:** This profile option is ignored if the profile *ASO: Automatic Sales Credit Allocation* is set to *None*.

If set to **Yes**, Quoting calls the engine to update credit information at header level and for all quote lines.

If set to **No**, Quoting calls the sales credit allocation engine to update header-level sales credit information only.

If null, defaults to **No**.

*Profiles for Sales Credits*

| Profile Option | Default Value | HTML or Forms UI | Application Level |
|---|---|---|---|
| ASO: Run Sales Credit Update for Quote Lines | No | Both | Site |

# Profile Options for Data Security

The following profile options apply to data security in Oracle Quoting.

### ASO: Enable Security Check

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

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

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

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

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

### ASO: Filter Quote Template By

Determines the list of quote templates that can be applied to a quote.

If set to **Quote Operating Unit**, the template listing displays all the templates for the quote's operating unit.

If set to **Accessible Operating Units**, the template listing displays all the templates for user accessible operating units. The Multi-Org Access Control (MOAC) security determines the list of operating units accessible to a user.

If set to **All Operating Units**, the template listing displays quote templates for all operating units.

If null, a default value of **Quote Operating Unit** is assumed.

### ASO: Security Enable From API

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

Security is enabled. Also determines if Saved Searches display quotes based on salesperson.

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

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

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

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

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

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

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

## Profiles for Data Security

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Enable Security Check | No | Both | Site, Application, Responsibility, User | Enable Quote Features |
| ASO: Filter Quote Template By | Null | HTML | Site, Application, Responsibility, User | None |
| ASO: Security Enable From API | No | Both | Site | Enable Quote Features |

# Profile Options for Defaulting

The following profile options apply to defaulting in Oracle Quoting.

### ASO: Calculate Price

Determines when the products and services in the quote are priced. The Automatic Pricing flag in the Quoting HTML and Forms UI derives its value from this profile.

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

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

If null, defaults to **Automatic**.

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

### ASO: Calculate Tax

Determines when tax is calculated for the quote. The Automatic Tax flag in the Quoting HTML and Forms UI derives its value from this profile.

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

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

If null, defaults to **Automatic**.

### ASO: Configuration Effective Date

This profile option determines the Configuration Effective Date and Model Lookup Date when model items in a quote are configured. You can set the configuration effective date as the model item creation date or the current date. This profile option is used for manual validation of model configuration.

> **Important:** For Forms Quoting, the value of the profile option must be set as Configuration Creation Date at the application level.

If set to **Configuration Creation Date**, the Configuration Effective Date and the Model Lookup Date is the date when the model item is configured.

If set to **Current Date**, the Configuration Effective Date and the Model Lookup Date is the current date.

If set to **Callback Function**, the user can develop code as per their business

requirements for determining the Configuration Effective Date and the Model Lookup Date. The ASO_QUOTE_HOOK.Get_Model_Configuration_Date API is invoked if the profile options value is set to Callback Function.

If null, a value of Configuration Creation Date is assumed.

For more information about how ASO: Configuration Effective Date is used, see Setting up Validations for Model Configurations, page 4-30.

### ASO: Copy Configuration Effective Date

This profile determines the Configuration Effective Date and Model Lookup Date for the new configuration when copying a configuration. The effective date can be the same as that of the existing configuration or the current date.

> **Important:** For Forms Quoting, the value of the profile option must be set as Yes at the application level.

If set to **Yes**, the Configuration Effective Date and the Model Lookup Date is the same for new and existing model configuration.

If set to **No**, the Configuration Effective Date and the Model Lookup Date for the new model configuration is the current date.

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

For more information about how ASO: Copy Configuration Effective Date is used, see Setting up Validations for Model Configurations, page 4-30.

### ASO: Default E-Business Quote Screen

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

### ASO: Default Expiration GL Calendar

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

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

### ASO: Default Expiration GL Period Type

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

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

### ASO: Default Header Level Sales Supplement Template

Sets the default header level sales supplement template.

### ASO: Default IB Search Results

Determines if instances are displayed by default when the IB search form is invoked. This profile is applicable to Forms only.

If set to **All Instances**, all instances are displayed by default in the search results form.

If set to **None**, no instances are displayed by default and you must conduct a search to view any results.

If null, defaults to **None**.

### ASO: Default Install Base Relationship

Determines the default Installed Base relationship for Relationship Type menu on the Installed Base Relationships page. This profile is applicable to Forms only.

If set to **Component-Of**, the Relationship Type defaults to Component-of.

If set to **Connected-To**, the Relationship Type defaults to Connected-To.

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

### ASO: Default Layout Template

Determines the default print template to be used for printing a quote and previewing contract terms on a quote. This profile is mandatory if Sales Contracts integration is enabled.

### ASO: Default Line Level Sales Supplement Template

Determines the default line level template.

### ASO: Default Ordered Quantity in OC UI

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

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

### ASO: Default Quote Status

Determines the default status of a new quote.

### ASO: Default Sales Channel

Determines the default sales channel for quotes if the Primary Sales Agent and Sales Group are defaulted from the Quoting parameters *Default Salesrep* and *Default Sales*

*Group.*

## ASO: Quote Duration

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

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

If null, a duration of 30 days is assumed.

## Profiles for Defaulting

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Calculate Price | Automatic | Both | Site, Application, Responsibility, User | User Interface, Pricing |
| ASO: Calculate Tax | Automatic | Both | Site, Application, Responsibility, User | User Interface, Pricing |
| ASO: Configuration Effective Date | Null | HTML | Site, Application, Responsibility | None |
| ASO: Copy Configuration Effective Date | Yes | HTML | Site, Application, Responsibility | None |
| ASO: Default Layout Template | N/A | Both | Site, Application, Responsibility | User Interface, Printing |
| ASO: Default Expiration GL Calendar | None | Both | Site | User Interface |

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Default Expiration GL Period Type | None | Both | Site | User Interface |
| ASO: Quote Duration | 30 | Both | Site, Application, Responsibility, User | User Interface |
| ASO: Default E-Business Quote Screen | Quoting | Forms | Site, Responsibility | User Interface |
| ASO: Default Header Level Sales Supplement Template | N/A | Both | Site, Application, Responsibility, User | User Interface |
| ASO: Default IB Search Results | None | Forms | Site, Application, Responsibility, User | User Interface |
| ASO: Default Install Base Relationship | Component-Of | Forms | Site, Application | User Interface |
| ASO: Default Line Level Sales Supplement Template | N/A | Both | Site, Application, Responsibility, User | User Interface |
| ASO: Default Ordered Qty in OC UI | 1 | Both | Site, Application, Responsibility, User | User Interface |
| ASO: Default Quote Status | Draft | Both | Site, Application | User Interface |

| Profile Option | Default Value | HTML or Forms UI | Application Level | Additional Profile Category |
|---|---|---|---|---|
| ASO: Default Sales Channel | N/A | Both | Site, Application, Responsibility, User | User Interface |

# Profile Options for Debug

The following profile options apply to debugging in Oracle Quoting.

### ASO: Enable ASO Debug

Enables the ASO debug messages for a single session.

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

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

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

*Profiles for Debug*

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

# Profile Options for ATP

The following profile options apply to the Availability to Promise feature in Oracle Quoting.

### ASO: ATP Use Sourcing Rule

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

Sourcing rules are defined in Materials Requirements Planning (MRP). Please refer to

the *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User Guide*.

If set to **Yes**, ATP is calculated based on sourcing rules if the warehouse is not specified in the quote.

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

If null, then the default value **No** is assumed.

### ASO: Default Ship From Org

Identifies the physical warehouse against which ATP is performed. This profile option plays a role only when you check for availability (ATP).

Mandatory if ATP is performed at order submission.

If null, no default value is assumed.

### Profile Options for ATP

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

# Profile Options for Credit Check

The following profile options apply to credit checks in Oracle Quoting.

### ASO: Credit Check Rule

Determines the credit check rule used for performing the internal credit check. If not set, internal credit checks cannot be performed.

This profile must be associated with a rule defined in Oracle Order Management for the credit check capability to be enabled. Only header level rules can be set as a value for the profile. The possible values that can be set are Booking, OCM Default Credit Check Rule, and Picking. These values are retrieved from the OE_CREDIT_CHECK_RULES table in Oracle Order Management. Refer the *Oracle Order Management User's Guide* for more information.

*Profile Options for Credit Check*

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

# Profile Options for Customers

The following profile options apply to customers in Oracle Quoting.

### ASO: Auto Account Creation

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

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

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

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

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

### ASO: Enforce Account Relationships

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

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

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

If null, defaults to **No**.

### Profile Options for Customers

| Profile Option | Default Value | HTML or Forms UI | Application Level |
|---|---|---|---|
| ASO: Enforce Account Relationships | No | Both | Site, Application, Responsibility, User |
| ASO: Auto Account Creation | As Required | Both | Site, Application |

# Profile Options for Configuring the User Interface

The following profile options apply to configuring the look and feel of the user interface in Oracle Quoting.

### ASO: Automatic Numbering

Determines if the system automatically generates a quote number.

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

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

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

### ASO: Display Installed Base Attributes

Determines whether or not attributes are displayed in the Installed Base search results for trade-ins. This profile is applicable to Forms only.

If set to **Yes**, attributes are displayed in the search results.

If set to **No**, attributes are not displayed in the search results.

If null, defaults to **No**.

### ASO: Max Number of IB Search Results

Determines the number of instances that can be displayed at once in the component/connection details. This profile is applicable to Forms only.

If null, defaults to **100**.

### ASO: Max Number of Results

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

If null, defaults to **100**.

### ASO: Require Group

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

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

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

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

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

### Profile Options for Configuring the User Interface

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| ASO: Display Installed Base Attributes | No | Forms | Site |
| ASO: Max Number of IB Search Results | 100 | Forms | Site |
| ASO: Max Number of Results | 100 | Forms | Site, Application |
| ASO: Require Group | No | Both | Site |
| ASO: Automatic Numbering | Yes | Both | Site, Application, Responsibility |

# Additional Profiles for Quoting Setup and Integration

The following profiles apply to other applications that Oracle Quoting integrates with.

### ASN: Customer Access Privilege

1. Determines the customers to display for a Quote To Customer, Quote to Account,

and Customer searches. See table below for details.

This profile also determines the customers to display in the Bill To/Ship To Account LOVs. For this purpose, this profile works in conjunction with the *ASO: Enforce Account Relationships* profile. See the Bill To, Ship To Customer searches, page A-38 table for details.

If set to **Sales Team**, the customer list is limited to those customers for which the user is on the customer sales team.

If set to **Full**, all customers are listed.

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| ASN: Customer Access Privilege | Sales Team | Both | Site, Application, Responsibility, User |

The following tables explain the behavior when the profiles are set to different values and the user has the Manager or User role.

*Quote to, End Customer, Customer Searches*

| Profile | Role = Manager | Role = User |
| --- | --- | --- |
| ASN: Customer Access Privilege = Sales Team | Show customers for which the user is on the customer sales team AND Show customers where the user's subordinates are on the customer sales team | Show customers for which the user is on the customer sales team |
| ASN: Customer Access Privilege = Full | Show all customers | Show all customers |

*Bill To, Ship To Customer searches*

| Profiles | Role = Manager | Role = User |
|---|---|---|
| ASO: Enforce Account Relationships = Yes | Show related customers | Show related customers |
| ASO: Enforce Account Relationships = No AND ASN: Customer Access Privilege = Full | Show all customers | Show all customers |
| ASO: Enforce Account Relationships = No AND ASN: Customer Access Privilege = Sales Team | Show customers for which the user is on the Customer sales team AND Show customers where the user's subordinates are on the customer sales team | Show customers where the user is on the customer sales team |

## HZ: Default Party Type

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

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

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

| Profile Option | Default Value | HTML or Forms UI | Application Level |
|---|---|---|---|
| HZ: Default Party Type | Organization | HTML | Site, Application |

## IBE: *i*Store Non Secure URL

Set this profile to use web publishing in Oracle Quoting. If you are using the HTML UI and are integrated with Oracle Sales, you must set this profile at the Application level for the application Oracle Sales. If you are not integrated with Oracle Sales, the profile

should be set at the Application level for Oracle Quoting.

For more information on Oracle *i*Store profile options, refer to the *Oracle iStore Implementation Guide*.

***Oracle iStore Profiles for Quoting***

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| IBE: iStore Non Secure URL | - | Both | Application |

## ICX: Preferred Currency

Determines the default currency for a quote.

If null, the first value in the LOV is assumed.

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| ICX: Preferred Currency | Null | Both | Site, Application, Responsibility, User |

## Multi Organization (MO) Profile Options

### MO: Security Profile

Oracle Applications uses the profile MO: Security Profile to link an operating unit to a responsibility. This is a flexible security profile which allows a responsibility access to one or more operating units without having to switch between responsibilities. It can be set to any value based on the operating units in the organization.

**MO: Default Operating Unit**You can set an operating unit as the default operating unit using this profile. This is useful when you transact in multiple operating units but frequently transact in one operating unit.

Please refer the *Oracle Applications Multiple Organizations Implementation Guide* for more details.

*Multiple Organization Profile Options*

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| MO: Security Profile | - | Both | Site, Application, Responsibility, User |
| MO: Default Operating Unit | - | Both | Site, Application, Responsibility, User |

## OA Personalization Profile Options

To enable personalization of the Quoting HTML interface, set the *Personalize Self-Service Defn* profile option to *Yes* and the *Disable Self-Service Personal* profile to *No*.

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

## OKC: Enable Sales Contracts

Determines if Oracle Sales Contracts integration with Quoting is enabled.

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| OKC: Enable Sales Contracts | No | Both | Site, Application |

## OM: Use Configurator

Indicates which Oracle application software will be launched to enter configuration information.

Should be set to **Yes** if a quote with model items will become an order.

| Profile Option | Default Value | HTML or Forms UI | Application Level |
| --- | --- | --- | --- |
| OM: Use Configurator | No | Both | Site |

# Oracle Pricing Profile Options for Quoting

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

**Oracle Pricing Profile Options for Quoting**

| Profile Option | Default Value | HTML or Forms UI | Application Level |
|---|---|---|---|
| QP: Multi-Currency Installed | No | Both | Site |
| QP: Multi-Currency Usages | No | Both | Application |
| QP: Verify GSA Violations | No | Both | Site |

### QP: Multi-Currency Installed

Determines if Quoting displays both price lists with the selected currency as the base currency and price lists where there is a conversion list for the selected currency.

### QP: Multi-Currency Usages

Determines if multi-currency price lists are used in calls to Pricing.

### QP: Verify GSA Violations

Indicates whether the pricing calculation engine should test for GSA violations.

If set to **Yes**, Pricing tests for GSA violations.

If set to **No**, Pricing does not check for GSA violations.

Mandatory if the *ASO: GSA Pricing* profile is set to *Error* or *Warning*.

# Oracle Quoting Obsoleted Profiles

The following profile options are obsolete from this release.

## Obsolete Profiles

| Profile Option | Remarks |
| --- | --- |
| ASO: Receipt Method | |
| ASO: ATP Default Customer | |
| ASO: ATP Default Ship To Site | |
| OTS: Default User Role and Sales Group | |
| OSO: Default Sales Group and Role | |
| OTS: Default User Sales Group | |
| ASO: Default Currency Code | |
| ASO: Print Quote Method | |
| ASO: Print Quotes Report Directory | |
| ASO: View Customers Without Accounts | |
| ASO: Configurator URL | |
| ASO: Enable OSO Integration | In the HTML interface, the Opportunity LOV can be enabled/disabled via OA Personalization. The Forms interface did not use this profile. |
| ASO: Print Quote Show Attachments | In the HTML interface, the Attachment options can be enabled/disabled via OA Personalization. For the same functionality, Oracle Forms will launch an OA page. |
| ASO: Manage Quote Templates | |
| ASO: Display Header Flexfields with Quote Header in HTML UI | The flexfields in the Quote Header can be enabled/disabled via OA Personalization. The Forms interface did not use this profile. |
| ASO: Default Order Type | |

| Profile Option | Remarks |
|---|---|
| ASO: Create New Shipping/Billing Customer | You can enable/disable the creation of any customer via OA Personalization. This profile was not used by Oracle Forms. |
| ASO: Default Contract Template | |
| ASO: Default Salesrep | |
| ASO: Default Sales Group | |
| ASO: Default Sales Role | |

# B

# Seeded Roles and Responsibilities

This appendix covers the following topics:

- Oracle Forms Responsibilities
- Oracle CRM Applications Responsibilities
- Oracle Quoting UI Responsibilities

## Oracle Forms Responsibilities

Access Oracle Forms by navigating to:

`http://<host>:<apache port>/`

and clicking **Apps Logon Links > VIS Logon** through the Forms cartridge. Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle Quoting in Oracle Forms.

*Oracle Forms Responsibilities*

| Responsibility | Tasks |
| --- | --- |
| Application Developer | Set up descriptive flexfields to appear on quote pages. See Defining Descriptive Flexfield Information, page 4-49 for details. |
| CRM Administrator | Set up resources. See Creating a Resource, page 4-17 |

| Responsibility | Tasks |
| --- | --- |
| *i*Store Concurrent Programs Responsibility | Run the concurrent programs *i*Store Search Insert when setting up *inter*Media product searches. See Enabling interMedia Search, page 4-25 for details. |
| Oracle Pricing Manager | Set up Oracle Pricing. See Setting up Oracle Advanced Pricing, page 2-2 for details. |
| Order Management Super User | Set up Oracle Order Management. See Setting up Oracle Order Management, page 2-8 for details. |
| | Set up credit check rules. See Setting Up Credit Check Functionality, page 4-31 for details. |
| Receivables Manager | Set up Oracle Receivables. See Setting up Oracle Receivables, page 2-2 for details. |
| System Administrator | Assign responsibilities to users. See Assigning a Seeded Oracle Quoting Responsibility to a User, page 4-7 for details. |
| | Set system profile options. See Setting System Profile Options, page A-2 for details. |
| XML Publisher Administrator | Set up XDO Print templates. See Setting Up Print Quote, page 4-21 for details. |

## Oracle CRM Applications Responsibilities

Access the Oracle CRM Applications login page at:

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

Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the user names and responsibilities necessary to perform setup and administrative tasks for Oracle Quoting in Oracle CRM Applications.

*Oracle CRM Applications Users and Responsibilities*

| User | Responsibility | Tasks |
|------|----------------|-------|
| SYSADMIN | CRM HTML Administration<br><br>Logging in with this responsibility launches the Oracle CRM System Administrator Console. | Set up branding for HTML Quoting.<br><br>Refer the *Oracle Applications Framework Personalization Guide* for more information. |

## Oracle Quoting UI Responsibilities

*Oracle Quoting Customer UI Users and Responsibilities*

| Responsibility | Tasks |
|----------------|-------|
| Quoting User | Access the HTML UI of Quoting. |
| Quoting Sales Agent | Access Forms UI of Quoting.<br><br>Run concurrent programs for creating defaulting rules or modifying seeded dependency rules and territory assignment. See Concurrent Programs in Defaulting Rules , page 5-12 and Assign Territory Access Concurrent Program Details, page 10-5 respectively for details. |

| Responsibility | Tasks |
| --- | --- |
| Quoting Sales Manager | • Set up/update defaulting rules. See Setting Up Defaulting Rules, page 5-1 for details.<br><br>• Set up sales supplement templates. See Setting up Sales Supplement Templates, page 4-46 for details.<br><br>• Set up/update quote status. See Setting Up Quote Status and Quote Status Transitions, page 4-3 for details.<br><br>• Set up/update quote templates. See the *Oracle Quoting User Guide* for details.<br><br>• Set up/update quote lookups. See Seeded Lookup Types, page D-1 for details.<br><br>• Run concurrent programs for creating defaulting rules or modifying seeded dependency rules and territory assignment. See Concurrent Programs in Defaulting Rules , page 5-12 and Assign Territory Access Concurrent Program Details, page 10-5 respectively for details. |

# C

# Oracle Quoting Security Scenarios

This appendix covers the following topics:

- Scenario 1 — Organization Split Into Regions and Districts
- Scenario 2 — Security Based on Profile Options/OA Personalization
- Scenario 4 — Call Center Environment
- Scenario 5 — Automatic Sales Team Assignment
- Scenario 6 — View/Modify Sales Credits

## Scenario 1 — Organization Split Into Regions and Districts

A national sales organization headed by Ruth Stamos is split into East and West regions with districts in the Eastern region.

The following diagram shows the hierarchy of the employees at the organization.
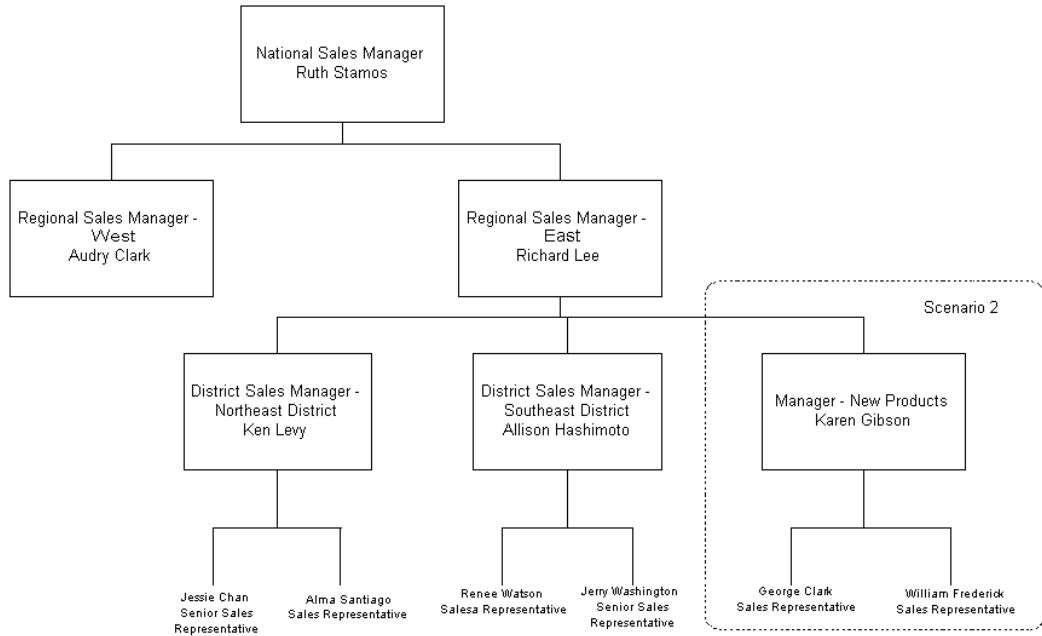
The following table lists the roles for the organization and the flags that should be selected for the role during set up.

*Roles*

| Role | Flag |
|------|------|
| National Sales Manager | Manager |
| Regional Sales Manager | Manager |
| District Sales Manager | Manager |
| Sales Representative | Member |
| Senior Sales Representative | Member |

Setup of this scenario requires the following steps:

1. Create a resource for each person.

   The following table lists the resources set up for the organization.

| **Resource** |
| --- |
| Ruth Stamos |
| Audrey Clark |
| Richard Lee |
| Ken Levy |
| Allison Hashimoto |
| Karen Gibson |
| Jessie Chan |
| Alma Santiago |
| Renee Watson |
| Jerry Washington |
| George Clark |
| William Frederick |

**2.** Create 5 roles.

The following table shows the roles set up for the company and the flags that must be enabled for each role during setup.

*Roles*

| Role Name | Flag Selected |
| --- | --- |
| National Sales Manager | Manager |
| Regional Sales Manager | Manager |
| District Sales Manager | Manager |
| Sales Representative | Member |
| Senior Sales Representative | Member |

3. Assign roles to resources.

   The following table shows the roles assigned to each resource within the organization.

*Assign Roles to Resources*

| Resource | Role |
| --- | --- |
| Ruth Stamos | National Sales Manager |
| Audrey Clark | Regional Sales Manager |
| Richard Lee | Regional Sales Manager |
| Ken Levy | District Sales Manager |
| Allison Hashimoto | District Sales Manager |
| Karen Gibson | District Sales Manager |

| Resource | Role |
|---|---|
| Jessie Chan | Senior Sales Representative |
| Alma Santiago | Sales Representative |
| Renee Watson | Sales Representative |
| Jerry Washington | Senior Sales Representative |
| George Clark | Sales Representative |
| William Frederick | Senior Sales Representative |

4. Create groups and parent/child relationships.

The following table lists the parent/child relationships for the groups for the organization.

| Group | Parent of: |
|---|---|
| National Sales | Western Region, Eastern Region |
| Western Region | - |
| Eastern Region | Northeast District, Southeast District, New Products |
| Northeast District | - |
| Southeast District | - |
| New Products | - |

5. Assign resources to groups.

   The following table lists the resources assigned to each group.

   | Resource | Role | Group |
   | --- | --- | --- |
   | Ruth Stamos | National Sales Manager | National Sales |
   | Audrey Clark | Regional Sales Manager | Western Region |
   | Richard Lee | Regional Sales Manager | Eastern Region |
   | Ken Levy | District Sales Manager | Northeast District |
   | Allison Hashimoto | District Sales Manager | Southeast District |
   | Karen Gibson | District Sales Manager | New Products |
   | Jessie Chan | Senior Sales Representative | Northeast District |
   | Alma Santiago | Sales Representative | Northeast District |
   | Renee Watson | Sales Representative | Southeast District |
   | Jerry Washington | Senior Sales Representative | Southeast District |
   | George Clark | Sales Representative | New Products |
   | William Frederick | Senior Sales Representative | New Products |

6. Check hierarchy.

   Refer to the *Oracle Trading Community Architecture User Guide* for information on accessing Resource Manager and group hierarchies.

   1. Select Ruth Stamos from the Name LOV.

**2.** Select All from the View By LOV.

The Members section should show all resources in the organization.

**3.** Select Direct Reports from the View By LOV.

The Members section should only show Richard Lee and Audrey Clark.

Repeat this procedure for all resources.

# Scenario 2 — Security Based on Profile Options/OA Personalization

Senior Sales Representatives determine who works on each sale and can also change price lists and discounts. Managers can edit their subordinates' quotes.

Setup of this scenario requires the setting up of profile options in Forms UI and OA Personalization in HTML UI.

The following table lists the profile option and OA Personalization settings for each resource.

> **Note:** OA Personalization is mentioned only when the profiles are applicable for the Forms interface.

| Resource | Role | Profile Option | OA Personalization |
|----------|------|----------------|--------------------|
| Ruth Stamos | National Sales Manager | Set ASO: Manager Role Access to *Update* | |
| Audrey Clark | Regional Sales Manager | Set ASO: Manager Role Access to *Update*. | |
| Richard Lee | Regional Sales Manager | Set ASO: Manager Role Access to *Update*. | |
| Ken Levy | District Sales Manager | Set ASO: Manager Role Access to *Update*. | |
| Allison Hashimoto | District Sales Manager | Set ASO: Manager Role Access to *Update*. | |

| Resource | Role | Profile Option | OA Personalization |
|---|---|---|---|
| Karen Gibson | District Sales Manager | Set ASO: Manager Role Access to *Update*. | |
| Jessie Chan | Senior Sales Representative | Set ASO: Price List Override to *Yes*. Set ASO: Discounting Privilege to *Full*. | Enable the Currency and Price List fields in the HTML UI. |
| Alma Santiago | Sales Representative | Set ASO: Price List Override to *No*. Set ASO: Discounting Privilege to *None*. | Disable the Currency and Price List fields in the HTML UI. |
| Renee Watson | Sales Representative | Set ASO: Price List Override to *No*. Set ASO: Discounting Privilege to *None*. | Disable the Currency and Price List fields in the HTML UI. |
| Jerry Washington | Senior Sales Representative | Set ASO: Price List Override to *Yes*. Set ASO: Discounting Privilege to *Full*. | Enable the Currency and Price List fields in the HTML UI. |
| George Clark | Sales Representative | Set ASO: Price List Override to *No*. Set ASO: Discounting Privilege to *None*. | Disable the Currency and Price List fields in the HTML UI. |
| William Frederick | Senior Sales Representative | Set ASO: Price List Override to *Yes*. Set ASO: Discounting Privilege to *Full*. | Enable the Currency and Price List fields in the HTML UI. |

## Scenario 3 — Quote Access Security for Sales Teams

The East Region of the national sales organization has a group dedicated to working across districts selling new products to existing customers. This group should have the ability to create new quotes for all customers, whereas the Southeast and Northeast district teams should only have access to quotes for which they are on the sales team.

1. For users on the Northeast and Southeast teams, set the profile *ASN: Customer Access Privilege* to **Sales Team** and the *ASO: New Quote Security* profile to **Yes**.

2. For employees on the new product team, set the profile *ASN: Customer Access Privilege* to **Full** and the *ASO: New Quote Security* profile to **Yes**.

The following table lists the resources, their associated roles, and the profile option settings.

| Resource | Role | Profile Option |
|---|---|---|
| Jessie Chan | Senior Sales Representative | Set ASN: Customer Access Privilege to *Sales Team*. |
| Alma Santiago | Sales Representative | Set ASN: Customer Access Privilege to *Sales Team*. |
| Renee Watson | Sales Representative | Set ASN: Customer Access Privilege to *Sales Team*. |
| Jerry Washington | Senior Sales Representative | Set ASN: Customer Access Privilege to *Sales Team*. |
| George Clark | Sales Representative | Set ASO: New Quote Security to *Yes*. |
| William Frederick | Senior Sales Representative | Set ASO: New Quote Security to *Yes*. |

# Scenario 4 — Call Center Environment

The organization has a call center that handles new and existing quotes. Sales representatives are not dedicated to particular customers or quotes.

The profile **ASO: Security Enable from API** should be set to *No*. Therefore, no security check is performed. This speeds up performance.

# Scenario 5— Automatic Sales Team Assignment

The organization wants to automatically assign their sales teams based on territories. They want Quoting to automatically call Territory Manager to assign sales teams at quote creation directly, and from templates. Additionally, they want to be able to call Territory Manager on user request.

The profile option **ASO: Automatic Sales Team Assignment** must be set to *Partial*.

# Scenario 6— View/Modify Sales Credits

A user can be a member of multiple sales groups, a manager of multiple sales groups or a combination i.e. a member in one or more sales groups and a manager in one or more sales groups.

In the organization, Karen Gibson is a Manager and Renee Watson is a Sales Representative. Here is the interaction between the **ASO: Modify Sales Credits** and **ASO: View Sales Credits** profile options under different scenarios.

This tables explains the application behavior when Renee Watson is the user.

***User is not a Manager***

| | ASO: View Sales Credits = Yes | ASO: View Sales Credits = Partial | ASO: View Sales Credits = No |
|---|---|---|---|
| **ASO: Modify Sales Credits = Yes** | • Can add/modify/remove sales credit recipients without any restriction<br><br>• Can view all sales credits recipients | • Can add/modify/remove sales credit recipients without any restriction<br><br>• Can view all sales credits recipients | • Can add/modify/remove sales credit recipients without any restriction<br><br>• Can view all sales credits recipients |

|  | ASO: View Sales Credits = Yes | ASO: View Sales Credits = Partial | ASO: View Sales Credits = No |
| --- | --- | --- | --- |
| **ASO: Modify Sales Credits = Partial** | • Cannot add/modify/remove sales credit recipients<br><br>• Can view all sales credits recipients | • Cannot add/modify/remove sales credit recipients<br><br>• Can view only his/her sales credits | • Cannot add/modify/remove sales credit recipients<br><br>• Can view only his/her sales credits |
| **ASO: Modify Sales Credits = No** | • Cannot add/modify/remove sales credit recipients<br><br>• Can view all sales credits recipients | • Cannot add/modify/remove sales credit recipients<br><br>• Can view only his/her sales credits | • Cannot add/modify/remove sales credit recipients<br><br>• Can view only his/her sales credits |

This tables explains the behavior when Karen Gibson is the user.

### User is a Manager

|  | ASO: View Sales Credits = Yes | ASO: View Sales Credits = Partial | ASO: View Sales Credits = No |
| --- | --- | --- | --- |
| **ASO: Modify Sales Credits = Yes** | • Can add/modify/remove sales credit recipients without any restriction<br><br>• Can view all sales credits recipients | • Can add/modify/remove sales credit recipients without any restriction<br><br>• Can view all sales credits recipients | • Can add/modify/remove sales credit recipients without any restriction<br><br>• Can view all sales credits recipients |

|  | ASO: View Sales Credits = Yes | ASO: View Sales Credits = Partial | ASO: View Sales Credits = No |
|---|---|---|---|
| **ASO: Modify Sales Credits = Partial** | • Can add/modify/remove sales credit recipients only if they are members of at least one sales group in which the user is a manager or members of at least one group which is the child group of a group where the user is a manager<br><br>• Can view all sales credits recipients | • Can add/modify/remove sales credit recipients only if they are members of at least one sales group in which the user is a manager or members of at least one group which is the child group of a group where the user is a manager<br><br>• Can view all sales credits recipients | • Can add/modify/remove sales credit recipients only if they are members of at least one sales group in which the user is a manager or members of at least one group which is the child group of a group where the user is a manager<br><br>• Can view all sales credits recipients |
| **ASO: Modify Sales Credits = No** | • Cannot add/modify/remove sales credit recipients<br><br>• Can view all sales credit recipients | • Cannot add/modify/remove sales credit recipients<br><br>• Can view sales credits recipients only if they are members of at least one sales group in which the user is a manager or members of at least one group which is the child group of a group where the user is a manager | • Cannot add/modify/remove sales credit recipients<br><br>• Can view only his/her sales credits |

# D

# Seeded Lookup Types

This appendix covers the following topics:

- Oracle Quoting Lookup Types

## Oracle Quoting Lookup Types

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

If lookups have User level access, you can:

- Change the meaning and description

- Change the tag (sort sequence)

- Disable a lookup

> **Note:** Addition of new lookup codes is not supported under any circumstances, unless otherwise specified. If a lookup type is preceded by an asterisk, you can add new lookup codes to the lookup type or disable lookup codes if at the User level.

Table Oracle Quoting Lookup Types, page D-1 lists descriptions and access levels for seeded Oracle Quoting Lookup Types (QuickCodes).

*Oracle Quoting Lookup Types*

| Lookup Type | Description | Access Level |
|---|---|---|
| ASO_ACCOUNT_CREATION | Lookup for profile option *ASO: Auto Account Creation*. | System |

| Lookup Type | Description | Access Level |
| --- | --- | --- |
| ASO_APPROVAL_INSTANCE_STATUS | Status of an approval instance | System |
| ASO_APPROVER_STATUS | Status of an approver response | System |
| ASO_BATCH_PROCESSING_PHASES | Lists the batch processing phases. | System |
| ASO_CONFIGURATION_STATUS | Lists the product configuration statuses. | System |
| ASO_CUSTOMER_TYPE | Defines customer type for sold-to, bill-to, and ship-to customers | System |
| ASO_DEFAULT_ORDER_STATE | Default order state when quote passes to Oracle Order Management. Seeded values are **Entered** and **Booked**. Each triggers different Oracle Order Management validation. | System |
| ASO_DISCOUNTING_PRIVILEGE | Discounting privilege for manual discounting | System |
| ASO_ER_REFRESH_MODE | Quoting mode in which fact tables are refreshed | System |
| ASO_FORMS_ACTION | Lists the values for the Actions LOV in the Quoting form. | System |
| ASO_GSA_PRICING | Determines level of error message for GSA violation | System |

| Lookup Type | Description | Access Level |
|---|---|---|
| ASO_IB_ACTION_TYPES | Types of actions that appear on the Search and Select: Installed Base Product page of the HTML UI. | User |
| ASO_IB_RELATIONSHIP_TYPES | Types of relationships that appear on the Installed Base Relationships page of the HTML UI. | User |
| ASO_ITEM_TYPE | Item types for items which are added to the quote | System |
| ASO_LINE_ACTION | Type of line actions that appear on the Lines page of the HTML UI. | User |
| ASO_LINE_ITEM_ACTIONS | Type of actions available in the Actions menu on the Lines page. HTML UI | User |
| ASO_MODIFY_SALES_CREDITS | Provides values for the profile option *ASO: Modify Sales Credits*. | System |
| ASO_OM_ACCESS_PRIVILEGE | Determines mode of access to the Oracle Order Management form via the Customer History form | System |
| ASO_ORDER_FEEDBACK_CRM_APPS | CRM applications registered for order feedback. All applications listed are informed of any changes to an order in Oracle Order Management. | User |

| Lookup Type | Description | Access Level |
|---|---|---|
| ASO_PAYMENT_TYPE | Payment types available to users | System |
| ASO_PQUOTE_OUTPUT_FM T | List of report formats in which a quote can be printed. | User |
| ASO_PQUOTE_TEMPLATES | List of report templates to print a report. | User |
| ASO_PQUOTE_XSL_FMT | List of XML Publisher formats in which a quote can be printed. This lookup is valid only if *ASO: Default Print Method* is set to XML Publisher. | System |
| ASO_PRICE_TAX_COMPUT E_OPTIONS | Lists the pricing and tax computation options. | System |
| ASO_PRICE_TAX_STATUS_I NDICATOR | Lists the pricing and tax status indicators. | System |
| ASO_PRODUCT_SOURCE | Types of product sources available on the Search and Select Product page (HTML UI). | User |
| ASO_QUOTE_ACTION | Types of actions available on the Overview page of HTML UI. For example, Change Customer, Create Template. | User |
| ASO_QUOTE_SECURITY | Provides values for the profile ASO: New Quote Security. The lookup codes here should not be changed. | System |

| Lookup Type | Description | Access Level |
| --- | --- | --- |
| ASO_QUOTE_SOURCE | Quote source | System |
| ASO_RESERVATION_TYPE | Determines values for level at which Reservation needs to be done | System |
| ASO_SAVED_SEARCH | Lists the saved searches in the HTML UI. | System |
| ASO_SECURITY_MGR_ROLE_ACCESS | Values for security profile ASO: Manager Role Access | System |
| ASO_SERVICE_TYPE | Service reference type code. A service must always be linked to an inventory item or an item in the customer install base. This list of values specifies where the item is. Seeded values include: Quote, Order, and Customer Product. | System |
| ASO_SERVICE_VALIDATION_TYPE | Validation used for ordering services on a quote. | System |
| ASO_SUP_COMPONENT_TYPE | Sales supplement data component type | System |
| ASO_SUP_PRESENTATION_STYLE | Sales supplement data presentation style | System |
| ASO_SUP_RESPONSE_TYPE | Sales supplement response type | System |
| ASO_SUP_SECTION_COMPONENT_TYPE | Sales supplement section component type | System |

| Lookup Type | Description | Access Level |
|---|---|---|
| ASO_SUP_TEMPLATE_CON TEXT | Sales supplement application values. | Extensible |
| ASO_SUP_TEMPLATE_QUO TE | ASO_SUP_TEMPLATE_QUO TE | Extensible |
| ASO_TEAM_ASSIGN | Provides list of values for the profile option ASO: Automatic Sales Team Assignment | System |
| ASO_TSN_TYPE | Determines whether the TSN type is ship method, payment term or freight term. | System |
| ASO_VIEW_SALES_CREDIT S | Provides the values for the profile option ASO: View Sales Credits. | System |
| ASO_PREVIEW_CONTRACT _OPTIONS | Provides configurable options to preview contracts from Oracle Quoting | User |
| CHANGE_CODE | Provides the change reason when you change the price in a quote without providing a change reason. | Extensible |

The following table lists the obsolete Oracle Quoting Lookup Types.

*Obsolete Oracle Quoting Lookup Types*

| Lookup Type | Description |
|---|---|
| ASO_CONTACT_PROFILE_TYPE | Profile type of a customer contact |

| Lookup Type | Description |
| --- | --- |
| ASO_ORDER_LINE_STATUESES | Status of an order line |
| ASO_ORDER_STATUSES | Order status |
| ASO_PARTY_RELATIONSHIP_TYPE | Type of party relationship |
| ASO_NON_DEFAULT_CONTRACT | Approval level for non-default contract options |
| ASO_QUOTE_RELATED_OBJECTS | Seeded lookup data required for data migration in Sales |
| ASO_RETURN_FOR | Reasons for returns |
| ASO_UNIVERSAL_SEARCH | Types of universal search |

# E

# Seeded Attributes in Oracle Approvals Management (OAM)

This appendix covers the following topics:

- Commonly Used OAM Seeded Attributes
- Mandatory Seeded OAM Attributes
- Non-Mandatory Seeded OAM Attributes

## Commonly Used OAM Seeded Attributes

Table OAM Seeded Attributes for Oracle Quoting, page E-2 displays seeded, commonly used attributes, display level (header or line), attribute description, and attribute type.

> **Note:** Oracle Quoting does not support currency conversion in its integration with Oracle Approval Management. Hence, the conditions defined in Oracle Approvals Management must have the same currency as the one in which the quotes are being created. This will avoid the currency conversion errors when the quote is submitted for approval.

*OAM Seeded Attributes for Oracle Quoting*

| Attribute | Level | Description | Attribute Type |
|---|---|---|---|
| Quote Total | Header | Total quote amount. Includes shipping and freight charges and taxes. | Currency |
| Quote Line Total | Line | Total quote line amount prior to shipping and freight charges and taxes. | Currency |
| Unit List Price | Line | Unit list price. | Currency |
| Unit Net Price | Line | Unit net price. | Currency |
| Manual Adjustment Amount | Line | Sum of the header and line manual adjustment/amounts. | Currency |
| Manual Adjustment Percent | Line | Sum of the header and line manual adjustment percentages. | Number |
| Quantity | Line | Quantity | Number |
| Unit of Measure | Line | Unit of measure | String (List of Values, when available) |
| Pricing Agreement | Header | Pricing agreement | String (List of Values, when available) |
| Line | Line | Price list | String (List of Values, when available) |

| Attribute | Level | Description | Attribute Type |
|---|---|---|---|
| Item Category (Derived from *ASO: Default Category Set* or if the profile is null, from the Order Management functional area defined in Inventory) | Line | Item category | String (List of Values, when available) |
| Item Number | Line | Item number | String (List of Values, when available) |
| Customer Name | Header | Name of the sold-to customer | String (List of Values, when available) |
| Account Number | Header | Account number of the sold-to customer | String (List of Values, when available) |
| Credit Update Date | Header | Date and time of most recent automatic sales credit update | Date |
| Non-Standard Terms | Header | Clauses that have been newly authored or standard clauses modified from the contract library. | String (List of Values, when available) |
| Clauses Changes from the Contract Template | Header | Clauses manually added/removed from a Quote or new clauses added to a template after instantiation. | String (List of Values, when available) |

| Attribute | Level | Description | Attribute Type |
|---|---|---|---|
| Contract Terms Source | Header | Determines if the Terms and Conditions on the quote are derived from an attached document. | String |
| Contract Authoring Party | Header | Determines whether the Terms and Conditions have been authored internally or by the Customer. | String |

## Mandatory Seeded OAM Attributes

OAM requires calling applications to populate specific mandatory attributes. All of these attributes are at the header level. Table OAM Mandatory Seeded Attributes, page E-4 lists seeded values and attribute types for these mandatory attributes.

*OAM Mandatory Seeded Attributes*

| Attribute | Attribute Type | Value |
|---|---|---|
| ALLOW_DELETING_RULE_GENERATED_APPROVERS | Boolean | False |
| ALLOW_REQUESTOR_APPROVAL | Boolean | True |
| AT_LEAST_ONE_RULE_MUST_APPLY | Boolean | False |
| EFFECTIVE_RULE_DATE | Date | The date the quote is submitted for approval. |

| Attribute | Attribute Type | Value |
| --- | --- | --- |
| TRANSACTION_DATE | Date | The date the quote is submitted for approval. |
| TRANSACTION_GROUP_ID | Number | Null |
| TRANSACTION_ORG_ID | Number | Org ID of the quote |
| TRANSACTION_SET_OF_B OOKS_ID | Number | Null |
| TRANSACTION_ID | Number | Quote header ID |
| TRANSACTION_REQUESTO R_PERSON_ID | Number | Person_id/fnd_user id of the requestor |

## Non-Mandatory Seeded OAM Attributes

The following seeded OAM attributes are not mandatory, but may be required under certain circumstances. Table Non-mandatory Seeded OAM Attributes, page E-5 displays the seeded values for Oracle Quoting.

*Non-mandatory Seeded OAM Attributes*

| Attribute | Attribute Type | Value |
| --- | --- | --- |
| INCLUDE_ALL_JOB_LEVEL _APPROVERS | Boolean | False |
| JOB_LEVEL_NON_DEFAUL T_STARTING_POINT_PERS ON_ID | Number | Null |

# F

# Category Set Usage in Quoting

This appendix covers the following topics:

- Overview of Category Set Usage
- Category Set Usage in the HTML User Interface
- Category Set Usage in the Forms User Interface
- Other Category Set Usages in Quoting

## Overview of Category Set Usage

The category set used in Quoting is determined as follows:

- The category set specified in the profile option *ASO: Category Set*. For more information on the category set profile option, refer to Appendix A, "Profiles in Oracle Quoting", page A-1.

- The category set specified in Inventory as the default category set for the functional area Order Management.

All references to category set are based on this definition unless otherwise noted.

## Category Set Usage in the HTML User Interface

The following table lists the fields affected by the category set.

*HTML Fields Affected by Category Set*

| Search Context | Description of category set usage |
|---|---|
| Search for Product in Product Catalog *inter* Media searches) | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |
| Search for Trade-in product from the Installed Base | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |
| Reconfiguration from Installed Base | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |
| Specify Service Reference when searching the Installed Base for a Serviceable product | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |

| Search Context | Description of category set usage |
|---|---|
| Specify Service Reference when searching Pending Orders for a Serviceable product | The category set is not used in this search. |
| Specify Service Reference when searching the Product catalog for a Serviceable product | The list of products is filtered based on the category set. |
| Add Related Products | The category set is not used when searching for related products. |

# Category Set Usage in the Forms User Interface

The following table lists the fields affected by the category set.

*Forms Fields Affected by Category Set*

| Search Context | Description of category set usage |
|---|---|
| Search for Product in Product Catalog (*inter* Media-based search) | The list of products is filtered based on the category set. |
| Search for Product in Product Catalog (non-*inter*Media-based search) | The category set is not used for this search. |
| Specify Service Reference when searching the Product Catalog for a Serviceable product | <ul><li>The product category LOV shows all categories belonging to the category set.</li><li>The product category LOV only shows categories (for the category set) that contain at least one product.</li><li>The list of products is filtered based on the category set.</li></ul> |

| Search Context | Description of category set usage |
|---|---|
| Search for Trade-in product from the Installed Base | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |
| Reconfiguration from Installed Base | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |
| Specify Service Reference when searching the Installed Base for a Serviceable product | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |
| Specify Service Reference when searching Pending Orders for a Serviceable product | • The product category LOV shows all categories belonging to the category set.<br><br>• The product category LOV only shows categories (for the category set) that contain at least one product.<br><br>• The list of products is filtered based on the category set. |

| Search Context | Description of category set usage |
| --- | --- |
| Add Related Products | The category set is not used when searching for related products. |
| Product LOV in the Quote Search form | The product LOV is not filtered based on the category set |

## Other Category Set Usages in Quoting

Category set is also used in Quoting for functionality that is unrelated to searching. The following table displays the category set usage in other areas of Quoting.

*Category Set Usage*

| Search Context | Description of category set usage |
| --- | --- |
| Print Quote - Subtotal by product category | The subtotal by product category is based on categories that belong to the category set. |
| Projected Commission - subtotal by product category | The subtotal by product category is based on categories that belong to the category set. |
| Territory Management setup | The categories used for setup are based on the product category. |
| Sales Credit Allocation Setup | The product LOV in the setup screen is based on the category set. |
| Pricing Integration | Advanced Pricing uses the default category set for the Order Management functional area for all references to the product category. It does not use the profile option *ASO: Category Set*. |

| Search Context | Description of category set usage |
|---|---|
| Quote Approvals setup | The seeded product category attribute is based on the category set. |

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