Oracle® Quoting

Implementation Guide

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Preface

Intended Audience

Welcome to Release 12.2 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.

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Related Information Sources

Integration Repository

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

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

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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 Guide

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 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 E-Business 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 interoperability and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Channel Revenue 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 Hub, 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 Channel Revenue Management all use Oracle Territory Manager to define ownership of transactions.

Installation and System Administration

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 12.2, 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 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

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 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-Business Suite 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 operating 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 e-Commerce Gateway Implementation Guide

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 Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

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 user interface is available as pages (HTML) and windows (Forms) that can be used independently. Oracle Quoting pages integrates with Oracle Sales and Oracle Quoting windows with Oracle TeleSales.

Oracle Quoting Key Features

The following are some of the key features in Oracle Quoting:

- 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 in a quote including manual price overrides
- Support Automatic and On-demand pricing and tax computation modes
- Comply with Latin American Tax Requirements
- Support multiple currencies 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 Header and Line Level Shipping and Billing for components of a configuration
- Add service products to a quote
- Support Buy One, Get One Free (promotional goods)
- Check availability of products
- Search Customer Install Base for Trade-Ins
- Search products using Oracle interMedia
- Support Line-Level Payments and Charges
- Enable 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 XML Publisher RTF Templates and Output
- Support 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

Features specific to Oracle Quoting pages

- 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

Features specific to Oracle Quoting windows

- Folder technology for customizing columns

2

Verify Mandatory Dependencies

This chapter covers the following topics:

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 E-Business Tax Implementation Guide*, *Oracle E-Business Tax User Guide* and the *Oracle Trading Community Architecture User Guide* for complete setup information.

- **Oracle Advanced Pricing** — Enables 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 Bills of Material** — Contains information about the components associated with a product. Refer to the *Oracle Bills of Material 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's 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** — Enables creation of orders from quotes. Refer to the *Oracle Order Management Implementation Manual* for complete setup information.

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

- **Oracle Applications Framework**— Provides the framework and user interface for Oracle Quoting pages. Enables personalization of the Oracle Quoting pages. Refer to the *Oracle Application 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 enables 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

- Log in to Oracle Application windows as a Receivables Manager. Navigate to Setup, select Tax, then select 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 enable 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 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 Advanced 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 Advanced Pricing, refer to the *Oracle Advanced Pricing User's Guide*.

Attributes Supported by Oracle Quoting

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

Attributes Supported by Oracle Quoting

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Customer	Account Type	Line or Header	Qualifier
Customer	Agreement Name	Line or Header	Qualifier
Customer	Agreement Type	Line or Header	Qualifier
Customer	Bill To	Line or Header	Qualifier
Customer	Customer Class	Line or Header	Qualifier
Customer	Customer Name	Line or Header	Qualifier
Customer	GSA Indicator	Line or Header	Qualifier
Customer	Invoice To Party Site	Line or Header	Qualifier
Customer	Party ID	Line or Header	Qualifier
Customer	Sales Channel	Line or Header	Qualifier
Customer	Ship To	Line or Header	Qualifier
Customer	Ship To Party Site	Line or Header	Qualifier
Customer	Site Use ID	Line or 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 or Header	Qualifier
Modlist	Promotion Number	Line or 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 or Header	Qualifier
Order	Pricing Date	Line	Qualifier
Order	Request Date	Line	Qualifier
Order	Shippable Flag	Line or Header	Qualifier
Pricing Attributes	Model ID	Line	Pricing
Pricing Attributes	Parent List Price	Parent List Price	Pricing
Segment	Market Segment	Line or Header	Qualifier
Segment	Target Segment	Line or Header	Qualifier
Terms	Payment Terms	Line or Header	Qualifier
Terms	Shipping Terms	Line or Header	Qualifier

Context	Attribute Name	Pricing Level	Pricing or Qualifier Attribute
Territory	Territory	Line or 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's 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*.

In Oracle Quoting pages and windows, 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*.

    - Iif Oracle *inter*Media is enabled and you add new products to the Inventory, these products will not show up in the Quoting UI until you run the iStore Search Insert concurrent program. See Running iStore Search Insert, page 4-27 for more information.
    - In Oracle Quoting pages, only *inter*Media product searches are supported.

Setting up Items to be Invoiced

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

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 menu, select Parameter. For more information, refer to the *Oracle Order Management 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. Log in to Oracle Application windows as Oracle Order Management Super User.
2. Navigate to Setup, select Transaction Types, then select 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 Supply Chain Planning Implementation and User's Guide* for more information.
- **Oracle Approvals Management** — Enables users to create an approval chain. Refer to the *Oracle HRMS 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 iStore** — Enables 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 and Administration 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** — Enables 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 nonstandard contract terms on a quote. Refer to the *Oracle Sales Contracts Implementation and Administration Guide* for more information.

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

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

- **Oracle Service Contracts** — Provides contract details for service items. Refer to the *Oracle Service Contracts Implementation and Administration 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 Setups 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 My Oracle Support.

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 Quoting pages)

For enhanced functionality, set up the following:

- Security
- Multiple Organization Access Control (MOAC)
- 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 organization environment, please refer to the *Oracle E-Business Suite 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. Define new or modify predefined quote statuses, status transitions, and extensibility rules based on business needs.	Mandatory	Quoting Sales Manager

Step	Description	Mandatory	Responsibility
2	Set up system profile options. Define system profile values. These affect the way Oracle Quoting looks and performs.	Mandatory	System Administrator
3	Set up Quoting parameters.	Mandatory	HRMS Manager
4	Set up *inter*Media Search.	Mandatory for Quoting pages	iStore Concurrent Programs System Administrator
5	Assign a predefined 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 Default Rules	Optional	Quoting Sales Manager
8	Set up Multi Organization Access Control	Optional	HRMS Manager
9	Modify predefined lookup types Some predefined lookups types are extensible and can be modified.	Optional	Quoting Sales Manager 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 multiple currencies price lists	Optional	Pricing Manager

Step	Description	Mandatory	Responsibility
13	Personalize the User Interface (pages)	Optional	Quoting User
14	Personalize the User Interface (windows) 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 rule set 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

Step	Description	Mandatory	Responsibility
22	Set up Web Publishing functionality Set specific profiles and set up specialty stores in iStore.	Mandatory to publish quotes	System Administrator iStore Administrator
23	Set up Approvals To enable approvals, set specific profile options and conditions and rules.	Mandatory for approvals	System Administrator AME (Approvals Management Engine) Administrator
24	Set up Sales Contracts To enable sales contracts, set specific profile options and set up clauses and contract templates in the Contract Terms library.	Mandatory to include sales contracts with quotes	System Administrator Contracts Administrator
25	Set up Credit Check functionality To enable credit check, set specific profile options.	Optional	Order Management Super User (for credit check rules) System Administrator
26	Set up QA Check	Optional	System Administrator Workflow Administrator Web Applications
27	Set up Sales Supplement functionality Use this functionality if you require supplemental information on quotes that will not pass into Oracle Order Management. Enable sales supplement functionality in Oracle Quoting windows and view it in the pages UI.	Optional	Quoting Sales Manager

Step	Description	Mandatory	Responsibility
28	Create additional attachments document categories. Oracle Quoting supports one document category. You can create additional document categories as needed.	Optional	Application Developer
29	Define descriptive flexfields. Customizable, user defined fields on the Oracle Quoting windows 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 Predefined Oracle Quoting Responsibility to a User
- Modifying Predefined 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 Override Modifiers
- Multiple Currencies Price Lists
- Promotional Goods
- Setting up Security
- 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 Customer Name for a Quote
- Setting Up Validations for Model Configurations
- Parameters for Configurator session
- 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
- Setting up Sales Supplement Templates
- Creating Additional Attachments Document Categories
- Defining Descriptive Flexfield Information
- Specifying Flexfields
- Notes from Opportunities
- Tasks From Opportunities (Pages only)
- Enabling Oracle Quoting Features with OA Personalization (Pages Only)
- Using Folder Functionality to Customize Windows
- 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 predefined 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 predefined quote statuses:

Predefined 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 iStore internal use only. Enables iStore to have a Draft to Order flow that is separate from Quoting.	No

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

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

Quote Status	Description	Read-only
Bid	Used to show that the quote was presented to a customer.	No

Quote Status	Description	Read-only
Lost	Used to show that the customer declined or rejected the quote.	No
Problem	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	Used to show that the quote was reviewed internally.	No

The statuses *Contract Canceled, Contract Pending, Contract Required, Ordered* and *Entered* appear in the Quote Status setup window but they are locked. You cannot enable or create any transitions for these statuses.

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

Rules for Quote Status Changes

Status transitions are regulated to prevent accidental changes, such as reverting an ordered quote status back to a not ordered status.

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

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

The following table shows the predefined transition rules for quote status changes:

Predefined 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 predefined 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 the following 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 displays this field with USER, if you create a 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 transitions to the following statuses:

- Approval Canceled
- Approval Rejected
- Approved
- Store Draft

You cannot create transitions from the following statuses:

- Approval Pending
- Order Submitted

- Store Draft

To set up quote statuses, log in to Oracle Application windows as a Quoting Sales Manager. Navigate to the Quote Status Setup window from Oracle Quoting link, select Setup, then select 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 version when the user selects the save icon for a quote in the main Quoting window, select the Auto Versioning check box for the new status.

- **Allowed Transition to Status region** You can enable 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 E-Business Suite User's Guide*.

Notes

- Login as a System Administrator, navigate to Profile, select System, then select the Find System Profile Values window.

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

Assigning a Predefined Oracle Quoting Responsibility to a User

The following predefined responsibilities are available in Oracle Quoting:

Access to Quoting Windows

- Quoting Sales Agent

- Quoting Sales Manager

  This responsibility also gives access to Quoting Setups.

Access to Quoting Pages

- Quoting User

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

To assign the Quoting pages predefined responsibility (Quoting User) to a user:

Prerequisites

The user must be set up as an application user.

Notes

- Login as a System Administrator, navigate to Security, select User, then select Define.
- Choose a responsibility for the user from the Responsibility LOV.

Modifying Predefined Lookup Types

To modify the predefined Lookup Types (QuickCodes), log in to Oracle Quoting windows as Quoting Sales Manager.

Navigate to Quoting, select Setup, then select Quick Codes.

For a complete list of the predefined lookup types in Oracle Quoting, refer to Appendix D, Predefined 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 setup 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:

- Customer Name for a quote and End Customer
- Contact Name for a quote, billing, shipping, and end customer
- Customer Name for billing and shipping

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

Use the following procedure to set up the following Quoting parameters.

- Default Order Type

  Determines how the order is 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

  Displays the primary sales representative group when the primary sales representative is obtained 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 obtained 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. Log in to Oracle Application window with the HRMS Manager responsibility.

2. Navigate to HRMS Manager : Work Structures : Organization, select 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 in 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 is 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 is obtained 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 setup 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 Override 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 override 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 Advanced Pricing User's Guide*.

Manual Modifiers in Buckets

In the Quoting windows, users can select manual adjustments from the Price

Adjustment window. Bucket numbers are displayed on this window as well, so that sales representatives can see the buckets before applying manual modifiers.

In the Quoting pages, 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.

Multiple Currencies Price Lists

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

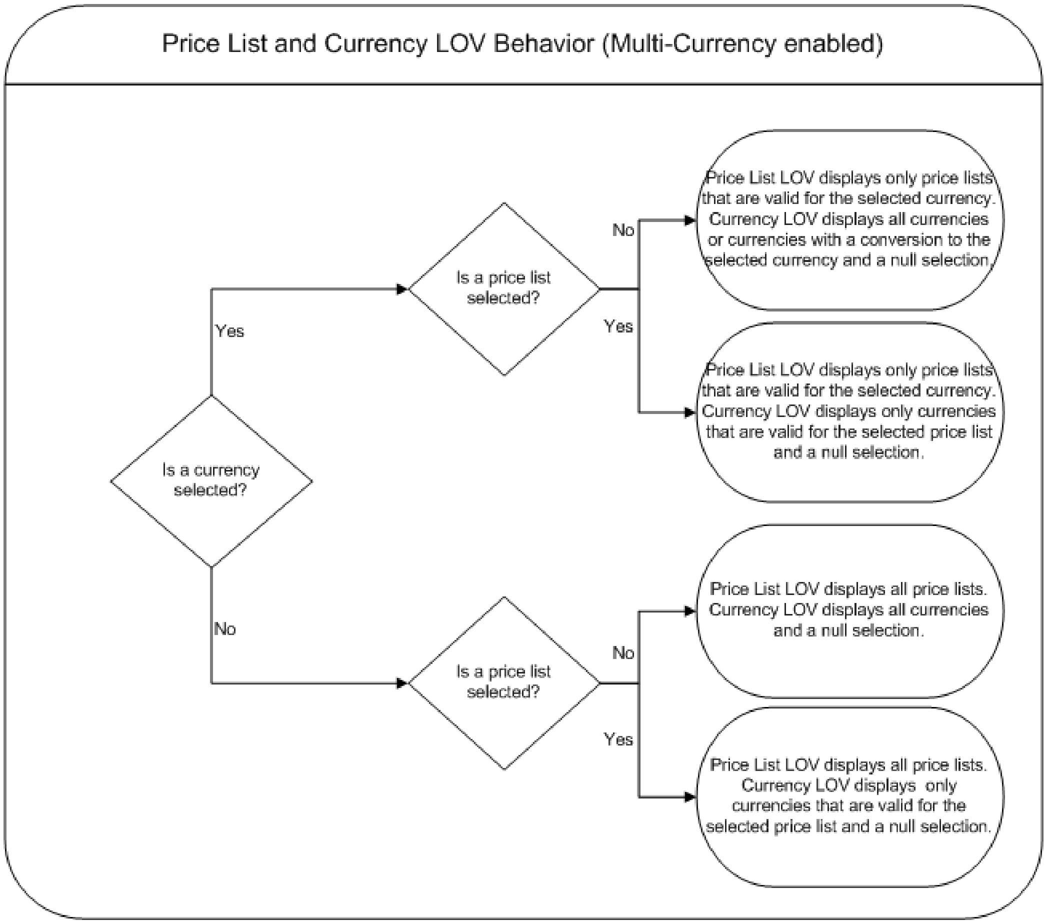
To use multiple currencies price lists, there must be a conversion list associated with each price list. The conversion list, set up in Advanced Pricing, contains an algorithm that converts the base currency price from the price list into one or more additional currencies.

The use of multiple currencies 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-40 or the *Oracle Advanced Pricing Implementation Guide* for more information.

You must also run the concurrent program *Update Price Lists with Multi-Currency Conversion Criteria* to enable multiple currencies 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 multiple currencies price lists. After this, you should not try to disable multiple currencies price list functionality. Changing the profile back to *No* may cause undesired results if conversion criteria are used. Oracle does not support changing the setting back to *No*. For more information, please refer to the *Oracle Advanced Pricing User's Guide*.

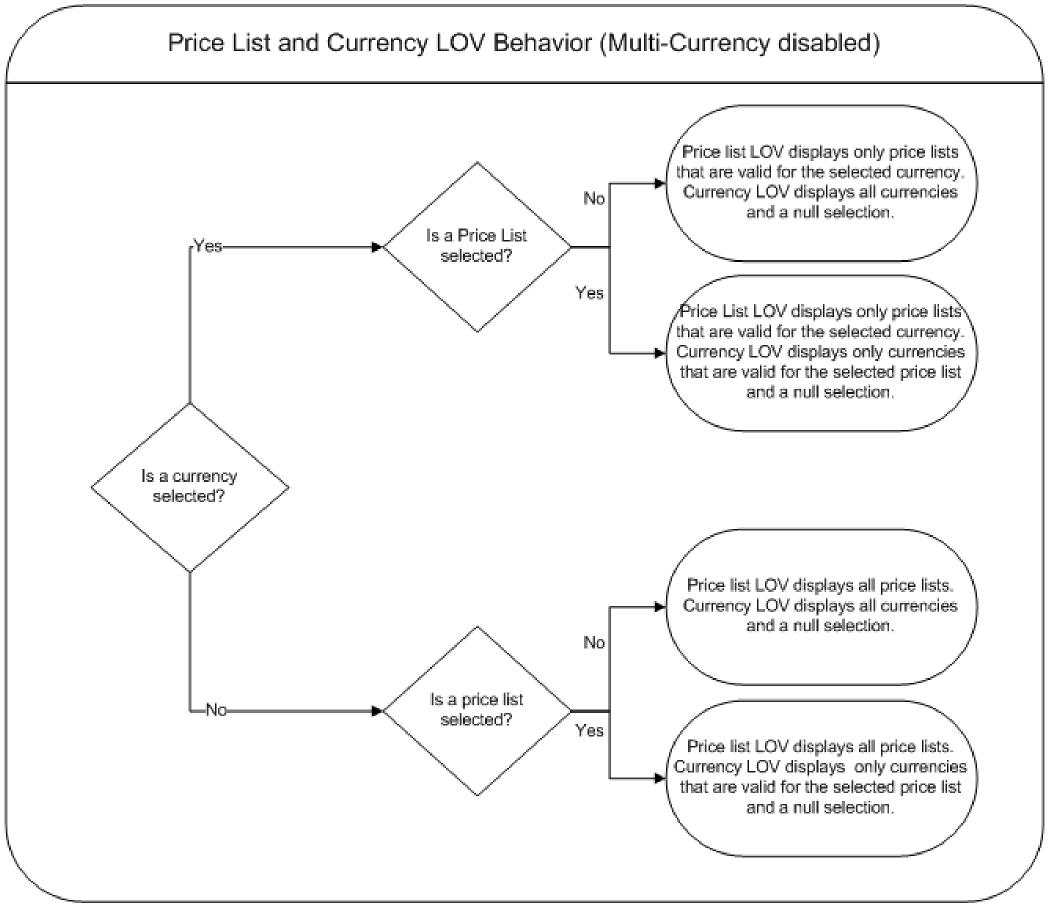
With multiple currencies price list functionality you can also change the selected currency for a quote and recalculate quote prices with the new currency. If automatic pricing mode is enabled, the quote reprices automatically. If not, you must reprice the quote manually for the changes to take effect.

If multiple currencies is turned on, the LOV behavior is as follows:



Additionally, in the windows, 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:



The *ASO: Price List Override* profile is not applicable in the Quoting pages. Instead, you can achieve the same functionality in the Quoting pages by enabling or disabling the Price List and Currency LOVs using OA Personalization.

Setting Up a Multiple Currencies Price List

You must set up a price list with a conversion list to use multiple currencies price lists. Price lists and multiple currencies 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 setup 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.

Creating a Resource

If you want all users to have access to Oracle Quoting when security is enabled, they must be setup 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
Jane Adams	District Sales Manager	Manager	Sales
John Franklin	Sales Agent	Member	Sales
Jennifer Moore	Sales Agent	Member	Sales

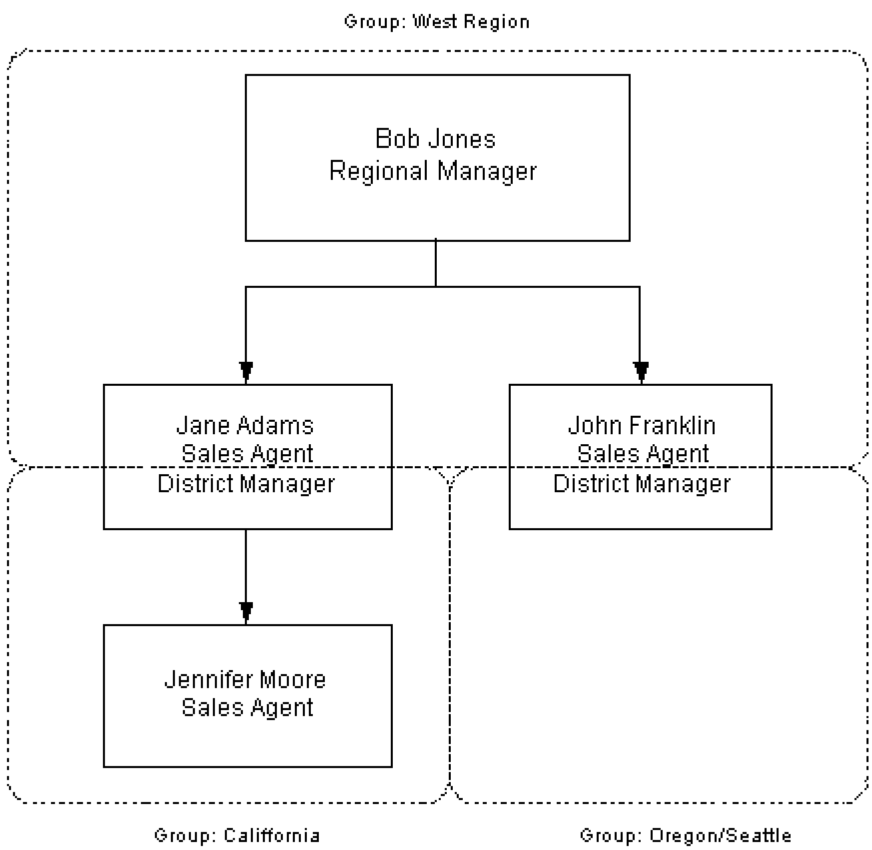
For complete instructions on setting up roles, refer to the *Oracle Trading Community Architecture User Guide* .

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

- Log in to Oracle Application window with the Resource Manager responsibility, and navigate to Resources Manager, select Maintain Resources, then select 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, log in to Oracle Application windows with the Resource Manager responsibility.

Navigate to Resource Manager, select Maintain Resources, then select Group Hierarchy.

Setting Up Sales Team Assignment and Sales Credit Allocation

Oracle Quoting integrates with Oracle Territory Manager 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 or projected commission functionality, 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 4-35
.

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-21.

Setting Up Print Quote

The layout of the printout is 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 or subtemplate using the XML Publisher Administrator responsibility. Refer the Customizing the XML Publisher Report, page 4-20 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 nonexecutable 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 nonexecutable, 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.

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.

Adding or Disabling Templates:

You can add new templates by either creating new templates or duplicating an existing template.

Log in to Self Service Applications with the XML Publisher Administrator responsibility. Navigate to Home and then Templates.

To create templates, click Create Template button. In the Create Template page, use the following steps:

1. Specify a template name.
2. Select Order Capture in the Application field.
3. Select one of these template types from the drop-down list: RTF or XSL-FO.

4. In the Data Definition field, specify Quote Printing.
5. In the Subtemplate field, select No if you are creating a RTF template. For a XSL template, select Yes.
6. In the Template File section, specify the path of the template file, language and territory. Select the Translatable check box if the template file can be translated.
7. Click Apply.

To duplicate an existing template:

1. Select Order Capture in the Application field and click Go. All templates are displayed.
2. Select a template. In the Localized Templates region, click the Download icon to download the source template file.
3. Modify the template file and save the changes. Use the Return to Templates link to navigate back to the Templates tab.
4. Select the template and click the Duplicate icon.
5. In the Copy Template page, specify these details for the template: code, name and application. Click Apply.
6. Query for the new template in the Templates tab. Select the template to view its details.
7. Click the Update icon in the Localized Templates section and specify the path to the modified source template file. Click Apply.

To disable an existing template:

1. Select Order Capture in the Application field and click Go. All templates are displayed.
2. Select a template and click Update.
3. Enter an end date for the template and click Apply.

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 pages 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 the subtotal 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.

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 Quoting windows, 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 pages, enable the *Submission Options* field using OA Personalization.

There are two fields in the Quoting UI using which you can opt to price or tax a quote manually or automatically for individual quotes. The fields are Price Calculation and Tax Calculation in the pages and Automatic Pricing and Automatic Tax in the windows. 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- Quoting pages: Price Calculation Quoting windows: Automatic Pricing	Field in- Quoting pages Tax Calculation Quoting windows: Automatic Tax	Quoting windows- ASO: Enable Batch Processing Setting	Quoting pages- 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 for the Product Catalog. Two Oracle iStore profile options affect the behavior of Quoting searches with *inter*Media enabled.

- IBE: Category Set Filter for Product Search

  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 enable *inter*Media search and you run the iStore concurrent program iStore Search Insert, the table IBE_CT_IMEDIA_SRCH is displayed with all category sets available in Inventory (all items). In iStore, use 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 display the table to only those in the specified category set.

- IBE: Web Status Filter for Product Search

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

For more information about the iStore profile options, see the *Oracle iStore Implementation and Administration Guide*.

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 Quoting windows:

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 Quoting pages. Hence, it is enabled by default.

Running iStore Search Insert

Run the iStore 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 iStore 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.

> **Note:** You can have only one *i*Store Search Insert concurrent request instance running at a time.

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

To run the iStore Search Insert program, log in to Oracle Application window with the iStore Concurrent Programs responsibility. Navigate to iStore Concurrent Programs, select 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 enables you to determine at which point an account must be created. Account creation is based on the *ASO: Auto Account Creation* profile option. 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.
- **Never create accounts—** Accounts are not created.

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 Shipping, Billing, or End Customer	Select Shipping, Billing, or 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	Display error if any customers on quote do not have accounts	Create account for all customers on quote without an account

Profile Option Setting	Create Sold To	Select Sold To	Create Shipping, Billing, or End Customer	Select Shipping, Billing, or End Customer	Web Publishing	Order Conversion
ASO: Auto Account Creation set to *Never*	Do not create account	Do not create account	Do not create account	Do not create account	Display error if any customers on quote do not have accounts	Display error if any customers on quote do not have accounts

Changing Customer Name 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 Displaying Default Values.

Parameters for Configurator session

You can use the ASO_QUOTE_HOOK.Get_Model_Init_Parameters API hook to provide parameters from Quoting to Configurator session. These parameters are used for building the model configuration rules. For example, to select a country specific power cord when configuring a desktop computer, you can provide the Ship To Country parameter for a quote to the Configurator session. The initialization parameters entered for the Configurator session using the API hook, override the values entered in Oracle Quoting.

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 Oracle Quoting pages and windows.

Setting up Web Publishing Functionality

Web publishing functionality enables sales representatives to publish quotes to customers through Oracle iStore 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 theIntegrating 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 and User's 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 enables 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. For more information see Appendix A, Profiles in Oracle Quoting, page A-1 .

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 billing customer, account, and 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 prehook and posthook for which customers can write code. The prehook 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 billing 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. For more information see Appendix A, Profiles in Oracle Quoting, page A-1 .

The credit check rule definition enables 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 Application window as an Order Management Super User.

Navigate to Setup, select Credit, then select 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 check box.
- **Exposure** tab
  - To include the shipping and freight charges on the quote and on not invoiced orders in the credit check calculation, you must select the Freight and Special Charges check box.
  - To include the tax for the quote and not invoiced orders in the credit check calculation, you must select the Include Tax check box.

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 configured by the application developer and enables users to make calls to non Oracle applications. The credit check can be configured by writing code for the prehook and posthook in the Quoting public API, ASO_CREDIT_CHECK_PUB.CREDIT_CHECK. The prehook is executed prior to the internal credit check and the posthook 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 4-35
.

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 displays 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 in 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. Display the JTF_USER_HOOKS table
2. Enable User Hooks
3. Disable User Hooks

Displaying the JTF_USER_HOOKS table:

The Populate script automatically runs against the database, when you install the patch, and displays 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
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 is 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.
<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 Microsoft 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.

Name	Description
<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.

Setting up Sales Supplement Templates

Sales Supplement enables the capture of additional quote-specific information that is not sent to Oracle Order Management.

Once setup is complete in Quoting windows, Sales Supplement information is accessible to sales representatives in Quoting pages and windows. In Quoting windows, Sales Supplement functionality is enabled using the profile option *ASO: Enable Sales Supplement*. In Quoting pages, 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, enabling 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
- Text box — Supports medium length text entries of up to 10 lines with 100 characters in each line.
- File Attachment — Supports association of file attachments.

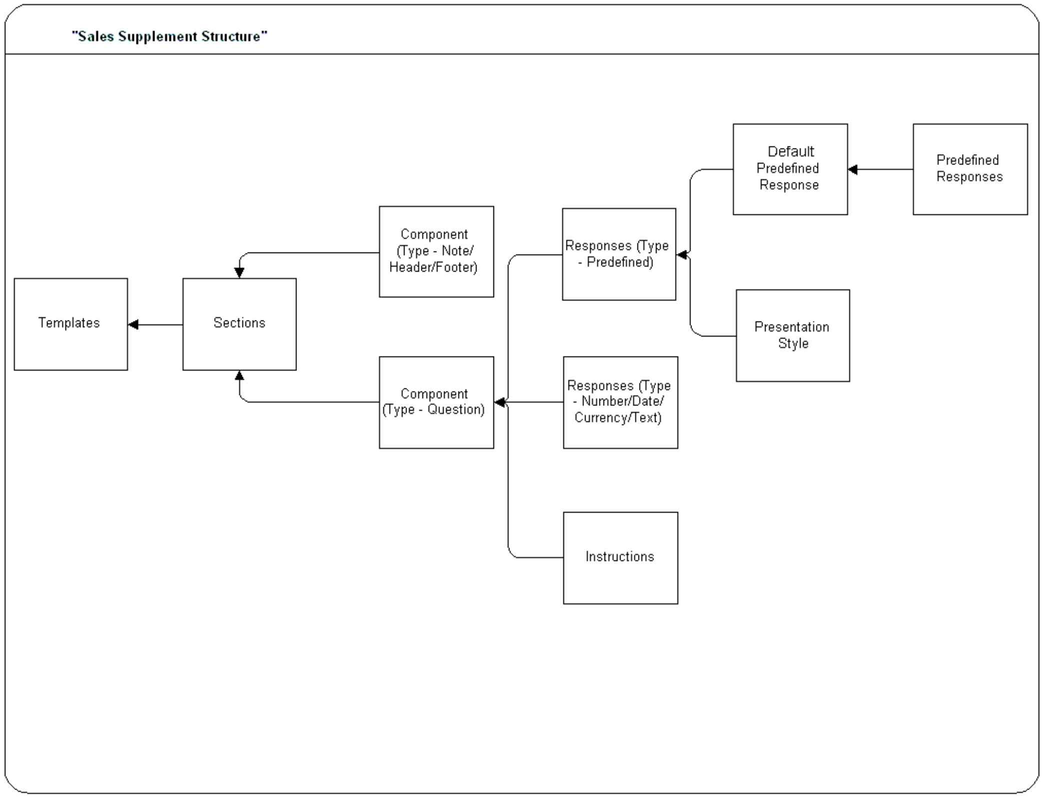
The response type Predefined Responses is associated with Presentation Styles. There are four Presentation Styles:

- List of Values
- List of Values With Blank
- Radio Group
- Check Box

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 enable 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 window in Quoting, you must enable Sales Supplement by setting the profile option *ASO: Enable Sales Supplement* to *Yes*.

Log in to Oracle Application window with the Quoting Sales Manager responsibility.

Navigate to Quoting, select Setup, then select 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, Text Box, 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, Check Box, 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

In Oracle Quoting, Miscellaneous is the default value for the Document Category field when you create an attachment. You can create additional categories as needed.

For more information on setting up attachments, refer to the *Oracle E-Business Suite Developer's Guide*. For more information on using attachments, refer to *Oracle Quoting User Guide* or *Oracle E-Business Suite User's Guide*.

Defining Descriptive Flexfield Information

Descriptive flexfields are blank fields that can be customized on the Oracle Quoting window that enable 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 Quoting windows, descriptive flexfields are located in the main Quoting window, and in the Pricing view of the Quote Lines tab. They are represented by an unnamed field enclosed in brackets.

In Quoting pages, 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 E-Business Suite 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 set up flexfields. When you log in to Quoting, you should see the flexfield segments you defined. Additionally, when you place an order, the flexfield information is available on the order.

Log in to Oracle Application window with the Application Developer responsibility.

Navigate to Flexfield, select Descriptive, then select 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 E-Business Suite 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 predefined 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 (Pages 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 enables 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 predefined 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 (Pages Only)

With OA Personalization, you can customize your Quoting pages interface by adding or removing or moving fields to locations where you are most comfortable. There are also some features in Oracle Quoting pages that must be enabled through 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 Application Framework Personalization Guide*.

- OA Personalization is applicable only in Oracle Quoting pages.

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

Web Publishing

You must display the fields in the following Quoting sections to enable Web publishing in Quoting pages.

- Simple or Advanced Search

  Display Web Published search criteria

  Display the Assistance Requested and Assistance Reason columns

- Views or Simple or Advanced Search

  Display Web Published in the search results table

  Display Web Published in the quote details

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

- Saved Search

  Display Web Published in the Available Columns shuttle

  Display Web Published in Column Name LOV

  Display Web Published in the Add another LOV

  Display the Assistance Requested and Assistance Reason columns

- Update Quote page

  Display 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

The following quote fields are not displayed by default when you create a 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 are controlled by profile options can be enabled or disabled through OA Personalization in the Quoting pages. Some of these profiles are applicable only to the Quoting windows.

Using Folder Functionality to Customize Windows

Quoting uses Oracle Applications Folder technology to enable users to customize the following windows:

- 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 or 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 window.
- 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 E-Business Suite User's Guide*.

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

Fields That Cannot be Hidden

Window	Field
Quote Search	Quote Number
Customer Search, select Organization	Customer
Customer Search, select Person	Last Name
Quote Header, select Summary	Order Type
Quote Header, select Summary	Currency
Quote Header, select Summary	Salesperson
Quote Header, select Addresses	Address details
Quote Header, select Addresses	Address in Billing region
Quote Header, select Addresses	Address in Shipping region

Window	Field
Quote Header, select Payment, Shipping	Payment Terms
Quote Header, select Payment, Shipping	Payment Type
Quote Header, select Tax	Tax Handling
Quote Header, select Tax	Tax Code
Quote Header, select Tax	Amount
Quote Lines, select Pricing	Line
Quote Lines, select Pricing	Model Status
Quote Lines, select Pricing	Product
Quote Lines, select Pricing	Qty
Quote Lines, select Pricing	UOM
Quote Lines, select Billing	Customer
Quote Lines, select Shipping	Customer
Quote Lines, select Shipping	Requested Date
Quote Lines, select Service	Reference Type
Sales Team	Full Access
Sales Team	Name
Price Adjustments	Remove
Price Adjustments	Adjustment
Price Adjustments	Adjustment Group
Price Adjustments	Value

Window	Field
Price Adjustments, select Details (Price Break Header)	Required Quantity
Price Adjustments, select Details (Price Break Header)	Adjustment Value
Price Adjustments, select Details (for a Promotional Good - qualifying item)	Line
Price Adjustments, select Details (for a Promotional Good - qualifying item)	Promotional Product
Price Adjustments, select Details (for a Promotional Good - promotional item)	Line
Price Adjustments, select Details (for a Promotional Good - promotional item)	Qualifying Product
Price Adjustments, select Details (for an Other Item Discount - qualifying item)	Line
Price Adjustments, select Details (for an Other Item Discount - qualifying item)	Discounted Product
Price Adjustments, select Details (for an Other Item Discount - discounted item)	Line
Price Adjustments, select 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

Window	Field
Trade In Product	Description
Service Reference	Category
Service Reference	Product
Service Reference	Description
Availability Details	Line
Availability Details	Product

Verify the Implementation

For Oracle Quoting to function properly, you must be able to complete the following tasks successfully:

1. Create a complex quote.
2. Create a customer for your quote.
3. Add and configure a model item.
4. Before submitting the quote as an order, create a 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 Default Rules

This chapter covers the following topics:

Overview of Default Rules

Default 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 predefined default rules that mirror the behavior of the application when default values are hard coded. However, you have the flexibility to disable the predefined rules and add your own.

You can enable default rules by setting the *ASO: Enable Defaulting Rule* profile to *Yes*. See Profile Options for Displaying Default Values, page A-26 for more details.

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

Default Rules

Default rules automatically display values into fields in a quote (both header and line). You can define the rules and the sequence in which the display of values into fields must take place. You can also define the trigger and dependant fields.

You can set up default 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 where default rules are used. The entities in Quoting are Quote Header, Quote Line, and Quote Opportunity.

- 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 Opportunity

  Applicable only to Create Quote from Opportunity flow

Default Condition Templates

Default condition templates act like top-level filters based on which the corresponding default rules are executed. Entities are the conditions for the filters. Each entity has attributes. Default 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. Default rules are created for some of the quote attributes. The default rule indicates what the default value for the attribute should be and the source from where it should be derived. Based on the default condition, the corresponding default rule is chosen for the attribute.

Source Types

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

Predefined Source Types for Quote Attributes Default Values

Source Type	**Meaning**
Same Record	Using 'Same Record' as a source type, you can provide a default value of an attribute from another attribute on the same entity record. For example- • The Customer Name and Account Number of the quote can be used as a source for providing the default values for billing Customer Name and Account Number. • The Expiration Date can be used as a source for providing the default value for the Pricing Date.
System Variable	This system variable source option enables you to provide system variables or functions of system variables for a field by default. This may be used to provide default values for date fields where SYSDATE expression or functions on SYSDATE are used to provide default value for 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 value to be the same value or to be used if none of the other sources for the default rule can provide a value.
Profile Option	This enables you to use a profile option, either system or user-defined, as a default value source.
PL/SQL API	This source type enables you to set up a complex default 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 default rule setup. See Predefined 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. **Important:** This source type is applicable only for line-level attributes.

Sequencing in Default Rules

Sequencing is the order in which the default rules are 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 displayed when the trigger attribute's value is changed. A dependent attribute must be cleared and displayed by default if the corresponding trigger attribute is changed. For example, a default 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 through 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.

Predefined Mapping Between Trigger and Dependent Attributes

The tables below indicate the predefined 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.

Predefined Mapping Between Trigger and Dependent Attributes (Quote Header)

Trigger Attribute	Dependent Attribute	Predefined Value for Dependency Enabled (Yes or No)
Operating Unit	Order Type	Yes
	Price List	Yes
	Primary Salesperson	Yes
	Contract Template	Yes
	Shipping Method	Yes

Trigger Attribute	Dependent Attribute	Predefined Value for Dependency Enabled (Yes or No)
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
	Billing Customer Name	No
	Billing Customer Account	No
	Freight Terms	No
	Price List	Yes

Trigger Attribute	Dependent Attribute	Predefined Value for Dependency Enabled (Yes or No)
Customer Name of quote	Contact Name	No
	Address	Yes
	Phone	Yes
	Billing Customer Name	Yes
	Billing Account Number	Yes
	Billing Contact Name	No
	Billing Address	Yes
	Shipping Customer Name	Yes
	Shipping Account Number	Yes
	Shipping Contact Name	No
	Shipping Address	Yes
	End Customer Name	No
	End Customer Account Number	No
	End Customer Contact Name	No
	End Customer Address	No
	Automatic Pricing	No
	Automatic Tax	No
Customer Account of a quote	Price List	Yes
	FOB	No
	Freight Terms	No
	Requested Date Type	Yes

Trigger Attribute	Dependent Attribute	Predefined Value for Dependency Enabled (Yes or No)
Billing Customer Account	Price List	No
	FOB	No
	Freight Terms	No
	Payment Terms	No
	Primary Salesperson	No
	Shipping Method	No
	Order Type	No
Billing Address (Party Site) - If Billing 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	Predefined Value for Dependency Enabled (Yes or 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

Predefined Mapping Between Trigger and Dependent Attributes (Quote Line)

Trigger Attribute	Dependent Attribute	Predefined Value for Dependency Enabled (Yes or No)
Line Type	Price List	No
	Shipment Priority	No
	FOB	No
	Demand Class	No
	Freight Terms	No
	Warehouse	No

Trigger Attribute	Dependent Attribute	Predefined Value for Dependency Enabled (Yes or No)
Pricing Agreement	PO Number	No
	Payment Terms	No
	Billing Customer Name	No
	Billing Customer Account	No
	Freight Terms	No
	Price List	Yes
Billing Customer Account	Price List	No
	FOB	No
	Freight Terms	No
	Payment Terms	No
	Shipping Method	No
Billing Address (Party Site) - If Billing 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	Predefined Value for Dependency Enabled (Yes or 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 predefined 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 Default Rules

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

- Provide a default value for the Price List attribute at the header level based on the value of billing Customer Name.
- Provide a default value for the Primary Salesperson based on the Customer Name of the quote.
- Change the logic for deriving the default value of expiration date. Instead of using the profile, define the new logic in a PL/SQL API. The PL/SQL API is the source for displaying the default value in the expiration date field. See Predefined API Signature for the PL/SQL Source Type, page 5-14 for the predefined PL/SQL API source type signature.

Notes about Default Rules

Some notes about default rules:

- The price list default values is not filtered by currency. After the price list default value is displayed, 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 default rule does not come up with a value for it.
- If Terms Substitution modifiers have been setup, the values in the Payment Terms, Freight Terms, and Shipping Method fields, automatically displayed based on default rules, may be overridden after the pricing call.
- Default rules are not applicable for creating and updating quote templates.
- Quote line default 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 default rule to display by default different Shipping Methods for the components of an ATO model.
- You cannot use default rules for the following quote header attributes:
  - Customer Name

    The Customer Name of quote in the Opportunity to Quote flow is obtained by default from the Opportunity and cannot be changed.
  - Opportunity Name

    The Opportunity Name in the Opportunity to Quote flow is obtained by default from the Opportunity and cannot be changed.
  - Account Number

    The Account Number of a quote in the Create Quote flow (standalone quote) does not use the default rules framework.
  - Sales Supplement

    The Sales Supplement field does not use the default rules framework.
  - Status

    The Status values of a quote are based on the transition rules set up in Quoting windows. The default rules framework is not used for this field.

Creating Default Rules

Use the following pointers to create default rules.

Steps

1. Log in to Oracle Quoting windows 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 default rules.

Changing the Predefined Dependency in Default Rules

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

Steps

1. Log in to the Linux or 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 script *asodepmp.sql* with the apps user responsibility.

6. Log in to Oracle Windows with the Quoting Sales Manager responsibility.

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

Concurrent Programs in Default Rules

There are two concurrent programs that affect the functioning of default 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 default rules for the first time or update existing default rules or conditions that are default, you must submit the Defaulting Generator concurrent program. New or modified rules and conditions are not effective until the program is successfully run.

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

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

- Add or update a default rule
- Enable or disable a default rule
- Add or update a default condition template
- Enable or disable a default condition template

Notes

- Log in to Oracle Windows with the Quoting Sales Manager responsibility and navigate to the Concurrent Requests window from the View menu, then select 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

- Log in to Oracle Windows with the Quoting Sales Manager responsibility and navigate to the Concurrent Requests window from the View menu, then select 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 choose Quote Header as the Database Object Name or L_QUOTE_LINE_ID if you choose Quote Line as the Database Object Name.
- Last Update Date Column Name

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

Predefined 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 predefined 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 display the default value of 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 default 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 enables sales representatives to publish quotes to customers through Oracle iStore specialty sites.

Validations

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

The following validations are 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 is not published.

Enabling Web Publishing

Use of Web publishing functionality in Quoting windows 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 pages, you must enable the Web publishing functionality by displaying 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 Quoting pages and there is integration with Oracle Sales, you must set *IBE: iStore Non Secure URL* at the Application level for Oracle Sales. If there is no integration 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 iStore. 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 and Administration Guide*.

Customizing Publish Notifications

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

Quoting pages provide 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 iStore Merchant UI to render each notification available for configuration, where the meaning of the lookup code in the merchant UI is available as a link.

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

- ASOQOTPUBLISHREG
- ASOQOTPUBLISHEXEC
- ASOQOTPUBLISHUNEXEC

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

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.

Log in to the JTF Login Page with the IBE_ADMIN responsibility.

Navigate to Menu, select Notifications.

Adding a new message in the work template file:

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

Notes

- Choose the item type iStore Alerts Workflow.

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

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 AME parallelization configuration is enabled, approvals functionality will not be supported in Forms Quoting. For information about AME parallelization configuration, see Quoting User Guide.

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 (AME).

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

   - Before submitting a quote for approval, you can skip certain approvers by selecting the approvers to be deleted from the list. To skip approvers in HTML UI, you must:

     - Set the value of Oracle Approvals Management attribute ALLOW_DELETING_RULE_GENERATED_APPROVERS to True.

     - Enable the Remove column using Oracle Application Personalization.

   In Forms UI, to skip approvers, you must set the profile option ASO: Allow Skip Approvers to Yes.

   > **Note:** For the HR Position Approver Type in AME, the first response is used in the approval process.

   The predefined attributes for Quoting are available in Appendix E Predefined Attributes in Oracle Approvals Management (AME), page E-1.

   For information on setting up rules and conditions in AME, 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 and 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 and Sales Contracts Integration

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

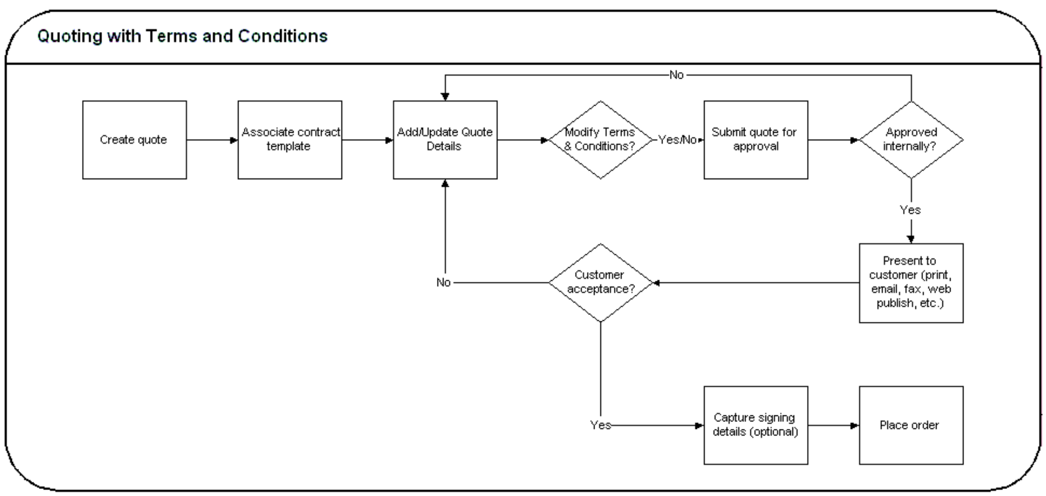
- Create quotes with standard contract terms from a contract template

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

- Add or remove preapproved standard contract terms
- Create nonstandard contract terms
- Use Contract Expert to bring in additional terms based on predefined 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 nonstandard 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, preapproved 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 can be updated. 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 iStore

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

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 are 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 nonexecutable, 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-21.

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 not a 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 Oracle 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 predefined approval attributes:

- Clause Changes from the Contract Template — Clauses manually added and 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 nonstandard 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 Predefined 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
- Predefined Attributes
- Setting Up Projected Commission Calculation

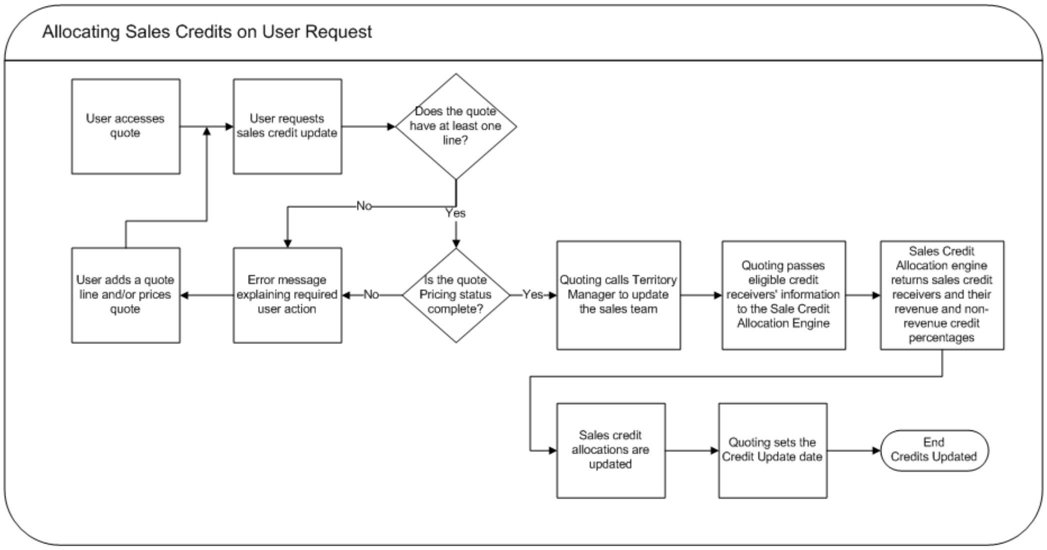
Overview of OIC Integration

Oracle Quoting 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 (as shown in the diagram below) 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.



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 nonrevenue receiver, Quoting provides the first OM nonquota credit type by default.

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 predefines certain attributes for the Oracle Quoting transaction source. Attributes are used to determine which credit rule is applied. See Predefined Attributes, page 9-6 for a complete list of predefined attributes.

Projected Commission

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

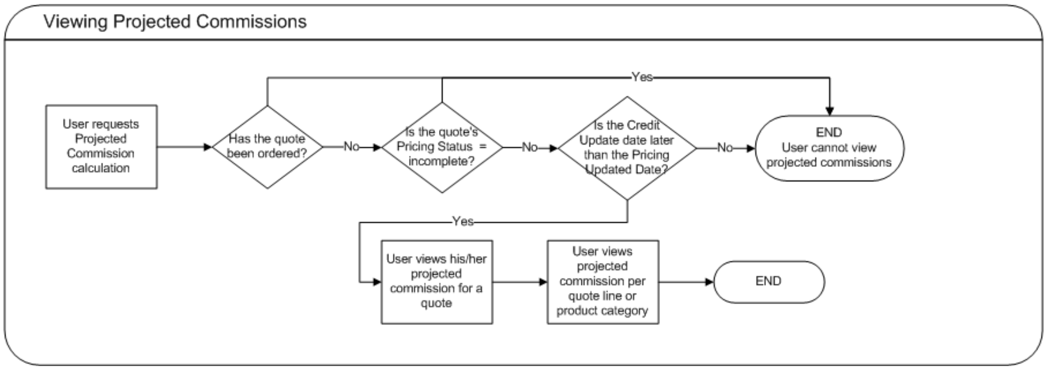
- An entire quote
- Each quote line
- Each product category

> **Note:** Projected commission is 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 nonrevenue 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

The following diagram shows the process for viewing projected commissions.



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 Nonrevenue 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 permits 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 setup 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 setup 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*.

Predefined Attributes

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

OIC Predefined Attributes for the Oracle Quoting Transaction Source

Attribute	Header, Line Level, or both	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, Line Level, or both	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	Account number of the customer for the quote
Customer Name	Both	Customer name for the quote
Area Code	Both	Area code of phone number for the customer contact, if quote customer is of type Organization, or the quote customer, if customer is of type Person.
City	Both	City in party site address for the customer of a quote
County	Both	County in party site address for the customer of a quote
State	Both	State in party site address for the customer of a quote
Province	Both	Province in party site address for the customer of a quote
Country	Both	Country in party site address for the customer of a quote
Postal Code	Both	Postal code in party site address for the customer of a quote

Attribute	Header, Line Level, or both	Description
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:

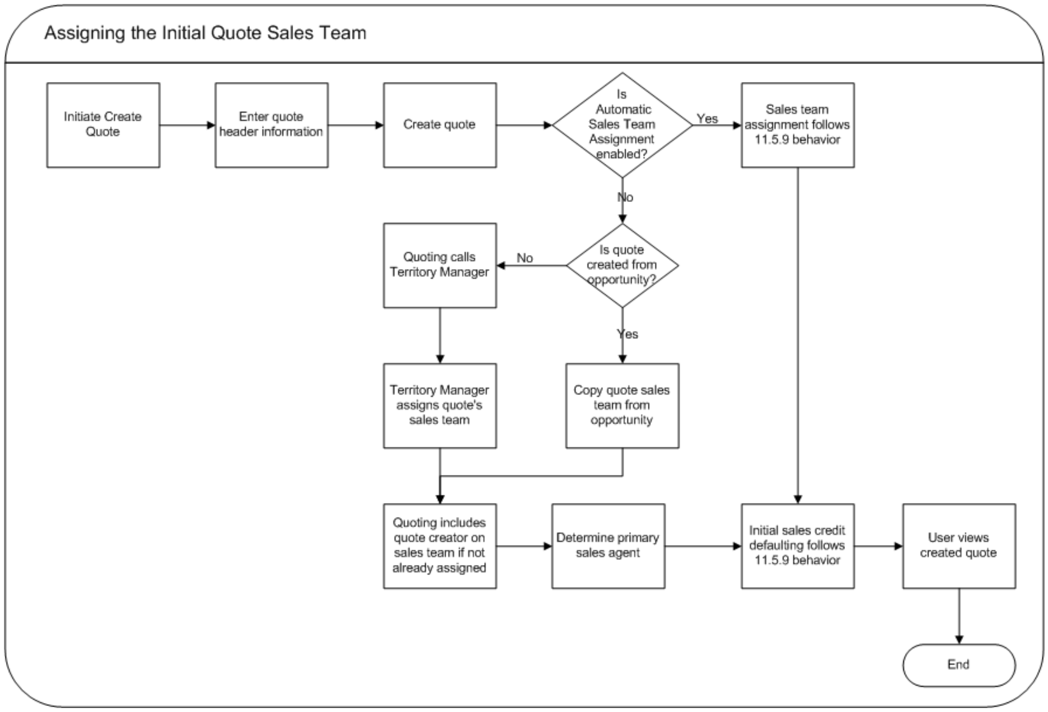
- Overview of Territory Manager Integration
- Setting Up Sales Team Assignment Functionality
- Territory Qualifiers Supported by Oracle Quoting

Overview of Territory Manager Integration

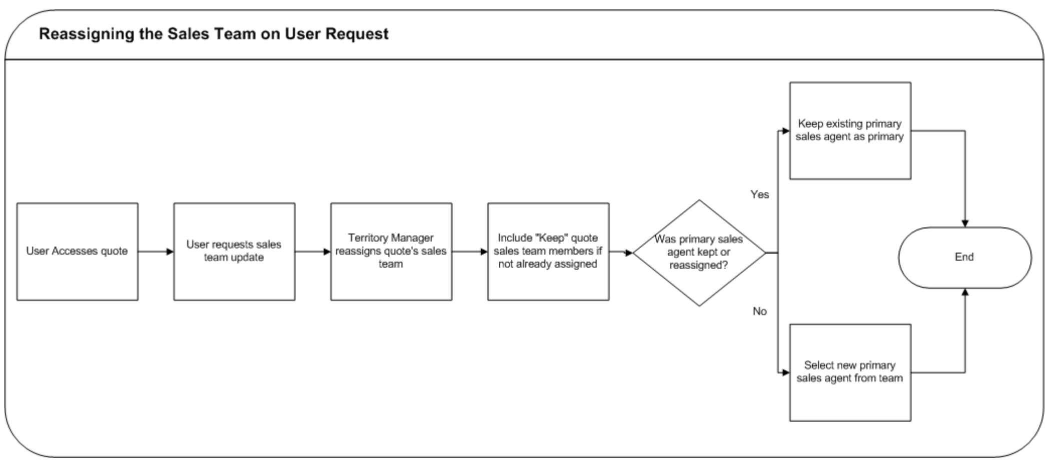
Oracle Quoting integrates with Oracle Territory Manager to assign sales teams to quotes at quote creation, on user request or at order submission. Administrators use Oracle Territory Manager to set up the sales territories and define territory assignment rules. Quoting will use these territories to automatically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

The following diagram shows how Quoting determines the initial quote sales team.



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



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

- Resource
- Group (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 are

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 or group combinations. In this instance, Quoting will randomly select one role-group combination to automatically display the resource's sales team details. On subsequent calls, if an existing resource does not have the Keep flag selected, Quoting will keep the existing role-group combination only if Territory Manager returns that combination for the resource. If the role-group data does not match any combination returned by Territory Manager, Quoting will select a new combination randomly.

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

> **Note:** If enabled, sales team assignment also applies for iStore carts for which sales 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 is provided as default 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 predefined transaction type for Quoting called *Quote*.
- Transaction qualifiers: Use the transaction qualifiers listed in Territory Qualifiers Supported by Oracle Quoting, page 10-6 to set up rules for assigning transaction types.
- Resources: Use Employee resources

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 provide the Primary Sales Agent value by default from the parameter *Default Salesrep*. If the Primary Sales Agent is displayed by default using this parameter, the role is provided by default 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 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 No Blank	Yes, if set to Blank	All quotes in the Ordered status are excluded
Exclude Expired Quotes	Yes No 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 an 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 through 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. If a product is assigned to multiple categories, one of the item categories must be the same as the qualifier category. The category set specified in the profile *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 Customer Name and Address of the quote.
Sales	Account	Account Hierarchy	Organizations of relationship *Subsidiary Of*
Sales	Account	Area Code	Area code of phone number for the customer contact if the quote customer is of type Organization or the quote customer if the customer is of type Person
Sales	Account	City	City in party site address for the customer of a quote
Sales	Account	Country	Country in party site address for the customer of a quote
Sales	Account	County	County in party site address for the customer of a quote

Usage	Type	Territory Qualifier	Description
Sales	Account	Customer Category	Customer category in Accounts Receivable for a party of the customer of a quote
Sales	Account	Customer Name	Name of party (person or organization) for the customer of a quote
Sales	Account	Customer Name Range	Range of names of customer parties (person or organization)
Sales	Account	Number of Employees	Total employees in the quote customer party's organization
Sales	Account	Postal Code	Postal code in party site address for the customer of a quote
Sales	Account	Province	Province in party site address for the customer of a quote
Sales	Account	SIC Code	SIC code of party for the customer of a quote
Sales	Account	State	State in party site address for the customer of a quote

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 Displaying Default Values
- 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

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 windows standalone, you should set profile options for Order Capture at the Application level.
- If you are using Quoting windows with Oracle TeleSales, you should set profile options for TeleSales at the Application level.
- If you are using Quoting pages standalone, you should set profile options for Oracle Quoting at the Application level.
- If you are using Quoting pages 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 E-Business Suite Maintenance Guide*.

Log in to Oracle windows as a Systems Administrator.

Navigate to the Profile menu, select System link, then select the 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, select 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 nonrevenue 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 windows UI. In the pages UI, the Approvals tab can be enabled or disabled through 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 display of the default values is based on the OM framework of displaying default values or not.

- If set to **Yes**, the default rule setup for Quoting is used.
- If set to **No**, the existing hard coded default 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 or 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 Quoting windows. Quoting pages use *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 windows UI. In Quoting pages, the *Line Level Billing Details* section can be disabled through 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 windows UI. In Quoting pages, the Sales Supplement subtab can be disabled through OA Personalization in the header as well as line levels.

ASO: Enable Web Publishing

Enables Web publishing functionality in Oracle Quoting windows.

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 windows UI. In Quoting pages, the Web Publish flag can be enabled or disabled through OA Personalization in the header as well as line levels.

Profiles to Enable Quote Features

Profile Option	Default Value	Windows or Pages	Application Level	Additional Profile Category
ASO: Enable Credit Check	No	Both	Site, Application	Credit Check
ASO: Enable Intermedia Search	No	Windows	Site, Application	Product Search
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	NA
ASO: Enable Approvals	Yes	Windows	Site, Application	NA
ASO: Enable Line Level Billing	No	Windows	Site, Application, Responsibility	NA
ASO: Enable Sales Supplement	No	Windows	Site, Application	NA
ASO: Enable Web Publishing	No	Both	Site, Application	NA
ASO: Automatic Sales Team Assignment	None	Both	Site	NA

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 windows UI. In Quoting pages, the *Skip Approvers* option can be disabled through OA Personalization.

ASO: Create New Customer

Enables 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 customer.

> **Note:** In the windows UI, customers are created using the Customer window. This window automatically creates an account for each new customer. If you do not want the user to create accounts when creating prospect customers, you must disable the Create Customer window by setting the profile option *ASO: Create New Customer* to *No*. Users can create customers using the Create Customer window 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 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 windows UI. In Quoting pages, the Create Customer button can be disabled through OA Personalization.

ASO: Discounting Privilege

Enables 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 nonautomatic 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 nonautomatic adjustments and charges.

If set to **None**, the user cannot manually adjust a price in the Oracle Quoting UI, or apply nonautomatic adjustments or charges, or override adjustment and charge values.

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

ASO: Enable Line Type

Permits 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 windows UI. In Quoting pages, the Line Category Code list can be disabled through OA Personalization.

ASO: Enable Manual Warehouse Selection

Permits 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 windows UI. In Quoting pages, the Warehouse LOV can be disabled through 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 windows UI and the **Place Order** action in pages 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

Enables the user to modify the sales credit recipients.

If set to **Yes**, the user can add, modify, or 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, or 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, or remove sales credit recipients.

If set to **No**, the user cannot add, modify, or 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 quotes.

If set to **Yes**, the user cannot create standalone quotes unless the quote is created from an opportunity.

If set to **No**, the user can create 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 windows through the Customer History window. 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 window.

If set to **Read Only**, the user can only view an order in the Oracle Order Management window.

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 Quoting windows 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

Enables 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 windows UI. In Quoting pages, the Currency and Price List LOVs can be disabled through 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

Enables 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 windows UI. In Quoting pages, the *Create Contact* and *Create Address* buttons can be disabled through OA Personalization.

ASO: Update Sales Team

Enables 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

Enables 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 or her own sales credits.

If set to **No**, the user can view only his or 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	Windows or Pages	Application Level	Additional Profile Category
ASO: Create New Customer	Yes	Windows	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	Windows	Site, Application, Responsibility, User	Pricing
ASO: Modify Sales Credits	Yes	Both	Site, Application, Responsibility, User	Sales Credits

Profile Option	Default Value	Windows or Pages	Application Level	Additional Profile Category
ASO: View Sales Credits	Yes	Both	Site, Application, Responsibility, User	Sales Credits
ASO: Manager Role Access	Inherit	Both	Site, Application, Responsibility, User	NA
ASO: Allow Quantity Updates for Component Item	Yes	Both	Site, Application	NA
ASO: Allow Quantity Updates for Top Level Model Item	Yes	Both	Site, Application	NA
ASO: Allow Skip Approvers	No	Windows	Site, Application	NA
ASO: Enable Line Type	No	Windows	Site, Application, Responsibility, User	NA
ASO: Enable Manual Warehouse Selection	No	Windows	Site, Application, Responsibility, User	NA
ASO: Enable Promotional Good Price Override	No	Both	Site	NA
ASO: New Quote Security	No	Both	Site, Application, Responsibility, User	NA

Profile Option	Default Value	Windows or Pages	Application Level	Additional Profile Category
ASO: Status Override	No	Both	Site, Application, Responsibility, User	NA
ASO: Update Sales Team	Yes	Both	Site, Application, Responsibility, User	NA
ASO: Operating Unit Override	No	Windows	Site, Application, Responsibility, User	NA
ASO: OM Access	Full	Windows	Responsibility, User	NA
ASO: Update Customer	Yes	Windows	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 by default in these fields, using the Oracle Order Management default rules.

ASO: Order Feedback Queue Retention Time

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

> **Caution:** You must 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 obtained by default from the parameter *Default Salesrep*.

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

Profiles for Order Conversion

Profile Option	Default Value	Windows or Pages	Application Level
ASO: OM Defaulting	No	Both	Site, Application
ASO: Default Order State	Booked	Both	Site, Application, Responsibility, User
ASO: Default Return Reason	NA	Both	Site, Application, Responsibility, User
ASO: Order Feedback Queue Retention Time	NA	Both	Site, Application
ASO: Quote Conversion Type	NA	Both	Site, Application, Responsibility, User
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

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 the *ASO: Default Order State* profile 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 windows 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 pages UI, use OA Personalization to enable or 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	Windows or Pages	Application Level	Additional Profile Category
ASO: Credit Card Authorization	No	Both	Site, Application, Responsibility, User	Enable Quote Features
ASO: Enable Line Level Payments	Yes	Windows	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 is automatically displayed 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 through a batch process, you will be notified when the pricing call is complete.

Note: This profile is applicable only in the windows UI. In Quoting pages, using OA Personalization, you can enable the *Submission Options* field to price the quote in batch mode.

ASO: GSA Pricing

Enables 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 windows interface of Quoting. Warnings are not displayed in the pages UI. If you are using the pages UI and you set this profile to Warning, Quoting will permit 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

Determines 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: Pricing 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

Subtab 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: Pricing 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

   Subtab 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 pages 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	Windows or Pages	Application Level	Additional Profile Category
ASO: Enable Batch Processing	No	Windows	Site	Enable Quote Features
ASO: Pricing Change Alert	Yes	Both	Site, Application, Responsibility	NA
ASO: GSA Pricing	NA	Both	Site, Application	NA
ASO: Require Minus Sign For Manual Discount	No	Pages	Site	NA
ASO: Default Price Change Reason	Null	Both	Site	NA

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	Windows or Pages	Application Level
ASO: Company Report Logo	NA	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 pages UI, determines the category set used when:

- Searching the product catalog
- Searching for trade-in products
- Reconfiguring a product from the Install Base
- Specifying service reference information for a serviceable item in the Install Base or Product Catalog

In the windows 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 Install Base
- Specifying service reference information for a serviceable product in the Install 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 setup screen for Sales Credit Allocation
- For the predefined 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 the end customer. If the end customer is not specified, service references are filtered by the customer for the quote.

If set to **No**, the service references are filtered by the customer for the quote.

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 window 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	Windows or Pages	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	Pages	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 set to null, the default value is **No**.

Profiles for Sales Credits

Profile Option	Default Value	Windows or Pages	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 must 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 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 window 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 check box 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	Windows or Pages	Application Level	Additional Profile Category
ASO: Enable Security Check	No	Both	Site, Application, Responsibility, User	Enable Quote Features
ASO: Filter Quote Template By	Null	Pages	Site, Application, Responsibility, User	None
ASO: Security Enable From API	No	Both	Site	Enable Quote Features

Profile Options for Displaying Default Values

The following profile options apply to displaying default values in Oracle Quoting.

ASO: Calculate Price

Determines when the products and services in the quote are priced. The Automatic Pricing flag in the Quoting windows and pages 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 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 windows and pages 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

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 Quoting windows, 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

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 Quoting windows, 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 window started when the user selects the Details button while viewing Quotes in the Quote or Order tab of the Oracle TeleSales E-Business window.

ASO: Default Expiration GL Calendar

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

If set to **None**, no calendar is 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 setup for the selected GL calendar in Accounts Receivable.

If set to **None**, no period type is 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 window is called. This profile is applicable to windows only.

If set to **All Instances**, all instances are displayed by default in the search results window.

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 Install Base relationship for Relationship Type menu on the Install Base Relationships page. This profile is applicable to windows only.

If set to **Component Of**, the Relationship Type automatically displays value as Component Of.

If set to **Connected To**, the Relationship Type automatically displays value as 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 Oracle 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 automatically displayed from the Quoting parameters *Default Salesrep* and *Default Sales Group*.

ASO: Quote Approval Workflow Item Type

Determines the workflow item type or workflow process used for quote approvals. Oracle Quoting uses this value to determine the name of the workflow process that must be executed.

By default, the profile is set at the Site level as ASOAPPRV.

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 Displaying Default Values

Profile Option	Default Value	Windows or Pages	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	Pages	Site, Application, Responsibility	None
ASO: Copy Configuration Effective Date	Yes	Pages	Site, Application, Responsibility	None
ASO: Default Layout Template	NA	Both	Site, Application, Responsibility	User Interface, Printing
ASO: Default Expiration GL Calendar	None	Both	Site	User Interface
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	Windows	Site, Responsibility	User Interface
ASO: Default Header Level Sales Supplement Template	NA	Both	Site, Application, Responsibility, User	User Interface

Profile Option	Default Value	Windows or Pages	Application Level	Additional Profile Category
ASO: Default IB Search Results	None	Windows	Site, Application, Responsibility, User	User Interface
ASO: Default Install Base Relationship	Component Of	Windows	Site, Application	User Interface
ASO: Default Line Level Sales Supplement Template	NA	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
ASO: Default Sales Channel	NA	Both	Site, Application, Responsibility, User	User Interface
ASO: Quote Approval Workflow Item Type	ASOAPPRV	Pages	Site	None

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	Windows or Pages	Application Level
ASO: Enable ASO Debug	NA	Both	User

Profile Options for ATP

The following profile options apply to the Availability to Promise (ATP) 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's 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.

Mandatory if ATP is performed at order submission.

If null, no default value is assumed.

Profile Options for ATP

Profile Option	Default Value	Windows or Pages	Application Level
ASO: Default Ship From Org	NA	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	Windows or Pages	Application Level
ASO: Credit Check Rule	NA	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, or 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, or 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, or 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 **Never**, and sold to, ship to, or bill to party on the quote does not have any active account, an error is displayed when the quote is Web published or submitted to Oracle Order Management.

If null, a default value of **As Required** is assumed.

ASO: Enforce Account Relationships

Determines if users can select only ship to or 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 pages UI, enables 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, a default value of **No** is assumed.

Profile Options for Customers

Profile Option	Default Value	Windows or Pages	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 windows 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, a default value of **No** is assumed.

ASO: Max Number of IB Search Results

Determines the number of instances that can be displayed at once in the component or connection details. This profile is applicable to windows only.

If null, a default value of **100** is assumed.

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 windows UI.

If null, a default value of **100** is assumed.

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	Windows or Pages	Application Level
ASO: Display Installed Base Attributes	No	Windows	Site
ASO: Max Number of IB Search Results	100	Windows	Site
ASO: Max Number of Results	100	Windows	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

Determines the customers to display for a quote, quote account, and customer searches. See table below for details.

This profile also determines the customers to display in the Bill To or 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-37 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	Windows or Pages	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 Customer, End Customer, and 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 and 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

BOM:Configurator URL of UI Manager

This profile option indicates the URL where the Oracle Configurator Servlet resides. This profile option must be set for the host application to locate the Oracle Configurator

Servlet. It is mandatory to set a value for this profile option, if Oracle Configurator is used for product configurations.

If null, no default value is assumed.

For more information about the BOM:Configurator URL of UI Manager, see Oracle Configurator Installation Guide.

Profile Option	Default Value	Windows or Pages	Application Level
BOM:Configurator URL of UI Manager	NA	Both	Site, Application, Responsibility, User

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 customers.

If set to **Person**, the customer type default value is person.

If set to **Organization**, the customer type default value is organization.

Profile Option	Default Value	Windows or Pages	Application Level
HZ: Default Party Type	Organization	Pages	Site, Application

IBE: iStore Non Secure URL

Set this profile to use Web publishing in Oracle Quoting. If you are using the pages UI and there is integration with Oracle Sales, you must set this profile at the Application level for the application Oracle Sales. If there is no integration with Oracle Sales, the profile should be set at the Application level for Oracle Quoting.

For more information on Oracle iStore profile options, refer to the *Oracle iStore Implementation and Administration Guide*.

Oracle iStore Profiles for Quoting

Profile Option	Default Value	Windows or Pages	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	Windows or Pages	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 permits 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.

Please refer the *Oracle E-Business Suite Multiple Organizations Implementation Guide* for more details.

Multiple Organization Profile Options

Profile Option	Default Value	Windows or Pages	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 pages 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 Application Framework Personalization Guide*.

OKC: Enable Sales Contracts

Determines if Oracle Sales Contracts integration with Oracle Quoting is enabled.

Profile Option	Default Value	Windows or Pages	Application Level
OKC: Enable Sales Contracts	No	Both	Site, Application

OM: Use Configurator

Indicates which Oracle application software is started to enter configuration information.

Should be set to **Yes** if a quote with model items will become an order.

Profile Option	Default Value	Windows or Pages	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 Advanced Pricing User's Guide*.

Oracle Pricing Profile Options for Quoting

Profile Option	Default Value	Windows or Pages	Application Level
QP: Multi Currency Installed	No	Both	Site
QP: Multi Currency Usage	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 Usage

Determines if multiple 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*.

B

Predefined Roles and Responsibilities

This appendix covers the following topics:

- Oracle Windows Responsibilities
- Oracle CRM Applications Responsibilities
- Oracle Quoting UI Responsibilities

Oracle Windows Responsibilities

Access Oracle windows by navigating to:

`http://<host>:<apache port>/`

and clicking **Apps Logon Links** , and then **VIS Logon** through the windows 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 Windows.

Oracle Windows 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
iStore Concurrent Programs Responsibility	Run the concurrent programs, iStore Search Insert when setting up *inter*Media product searches. See Enabling interMedia Search, page 4-26 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 4-32 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 Predefined 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 4-20 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 Logging in with this responsibility launches the Oracle CRM System Administrator Console.	Set up branding for Quoting pages. Refer the *Oracle Application Framework Personalization Guide* for more information.

Oracle Quoting UI Responsibilities

The following table summarizes Oracle Quoting Customer UI users and responsibilities.

Oracle Quoting Customer UI Users and Responsibilities

Responsibility	Tasks
Quoting User	Access the pages UI of Quoting.
Quoting Sales Agent	Access windows UI of Quoting. Run concurrent programs for creating default rules or modifying predefined dependency rules and territory assignment. See Concurrent Programs in Default Rules , page 5-12 and Assign Territory Access Concurrent Program Details, page 10-5 respectively for details.

Responsibility	Tasks
Quoting Sales Manager	• Set up and update default rules. See Setting Up Default Rules, page 5-1 for details. • Set up sales supplement templates. See Setting up Sales Supplement Templates, page 4-46 for details. • Set up and update quote status. See Setting Up Quote Status and Quote Status Transitions, page 4-3 for details. • Set up and update quote templates. See the *Oracle Quoting User Guide* for details. • Set up and update quote lookups. See Predefined Lookup Types, page D-1 for details. • Run concurrent programs for creating default rules or modifying predefined dependency rules and territory assignment. See Concurrent Programs in Default Rules , page 5-12 and Assign Territory Access Concurrent Program Details, page 10-5 respectively for details.

C

Oracle Quoting Security Scenarios

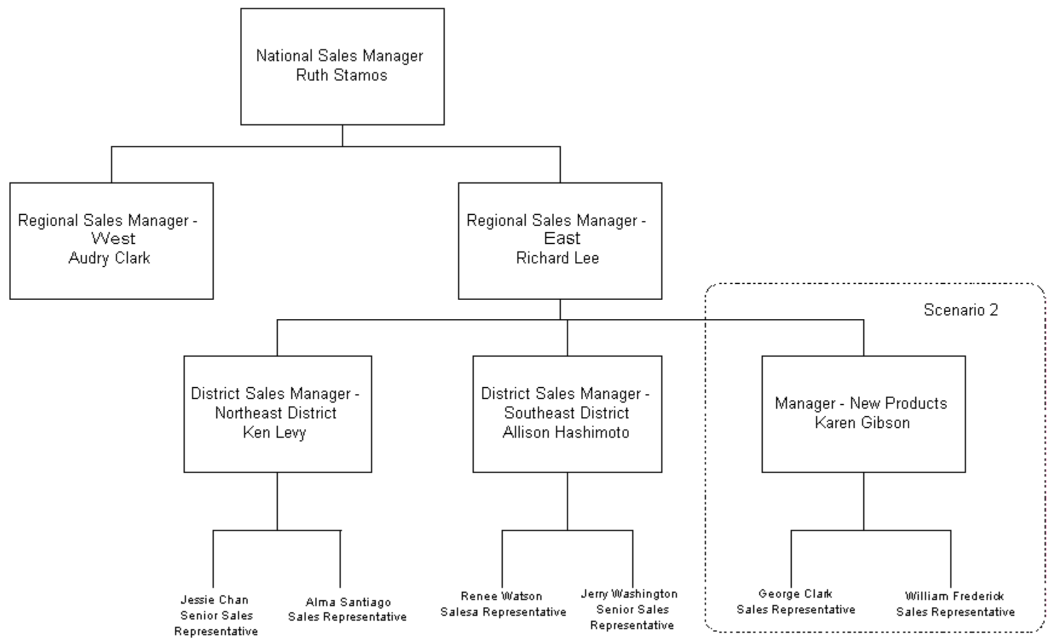
This appendix covers the following topics:

- Scenario 1 — Organization Split Into Regions and Districts
- Scenario 2 — Security Based on Profile Options and OA Personalization
- Scenario 4 — Call Center Environment
- Scenario 5— Automatic Sales Team Assignment
- Scenario 6— View and 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.



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
Audry Clark
Richard Lee
Ken Levy
Allison Hashimoto
Karen Gibson
Jessie Chan
Alma Santiago
Renee Watson

Resource
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 in the organization.

   Assign Roles to Resources

Resource	Role
Ruth Stamos	National Sales Manager
Audry Clark	Regional Sales Manager

Resource	Role
Richard Lee	Regional Sales Manager
Ken Levy	District Sales Manager
Allison Hashimoto	District Sales Manager
Karen Gibson	District Sales Manager
Jessie Chan	Senior Sales Representative
Alma Santiago	Sales Representative
Renee Watson	Sales Representative
Jerry Washington	Senior Sales Representative
George Clark	Sales Representative
William Frederick	Senior Sales Representative

4. Create groups and parent or child relationships.

   The following table lists the parent or 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
Audry 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 Audry Clark.

   Repeat this procedure for all resources.

Scenario 2 — Security Based on Profile Options and 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 windows UI and OA Personalization in pages 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 windows interface.

Resource	Role	Profile Option	OA Personalization
Ruth Stamos	National Sales Manager	Set ASO: Manager Role Access to *Update*	NA
Audry Clark	Regional Sales Manager	Set ASO: Manager Role Access to *Update*.	NA
Richard Lee	Regional Sales Manager	Set ASO: Manager Role Access to *Update*.	NA
Ken Levy	District Sales Manager	Set ASO: Manager Role Access to *Update*.	NA
Allison Hashimoto	District Sales Manager	Set ASO: Manager Role Access to *Update*.	NA
Karen Gibson	District Sales Manager	Set ASO: Manager Role Access to *Update*.	NA
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 pages 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 pages UI.

Resource	Role	Profile Option	OA Personalization
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 pages 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 pages 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 pages 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 pages 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 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 call Territory Manager on user request.

The profile option **ASO: Automatic Sales Team Assignment** must be set to *Partial*.

Scenario 6— View and 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, or remove sales credit recipients without any restriction • Can view all sales credits recipients	• Can add, modify, or remove sales credit recipients without any restriction • Can view all sales credits recipients	• Can add, modify, or remove sales credit recipients without any restriction • Can view all sales credits recipients
ASO: Modify Sales Credits = Partial	• Cannot add, modify, or remove sales credit recipients • Can view all sales credits recipients	• Cannot add, modify, or remove sales credit recipients • Can view only his or her sales credits	• Cannot add, modify, or remove sales credit recipients • Can view only his or her sales credits
ASO: Modify Sales Credits = No	• Cannot add, modify, or remove sales credit recipients • Can view all sales credits recipients	• Cannot add, modify, or remove sales credit recipients • Can view only his or her sales credits	• Cannot add, modify, or remove sales credit recipients • Can view only his or 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, or remove sales credit recipients without any restriction • Can view all sales credits recipients	• Can add, modify, or remove sales credit recipients without any restriction • Can view all sales credits recipients	• Can add, modify, or remove sales credit recipients without any restriction • Can view all sales credits recipients
ASO: Modify Sales Credits = Partial	• Can add, modify, or 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 • Can view all sales credits recipients	• Can add, modify, or 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 • Can view all sales credits recipients	• Can add, modify, or 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 • 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 = No	• Cannot add, modify, or remove sales credit recipients • Can view all sales credit recipients	• Cannot add, modify, or remove sales credit recipients • 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, or remove sales credit recipients • Can view only his or her sales credits

D

Predefined 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:** 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 predefined Oracle Quoting Lookup Types (QuickCodes).

Oracle Quoting Lookup Types

Lookup Type Code	Description	Access Level
ASO_ACCOUNT_CREATION	Lookup for profile option *ASO: Auto Account Creation*	System

Lookup Type Code	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. Predefined 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_ACTIONS	Lists the values for the Actions LOV in the Quoting window	System
ASO_GSA_PRICING	Determines level of error message for GSA violation	System
ASO_IB_ACTION_TYPES	Types of actions that appear on the Search and Select: Install Base Product page	User

Lookup Type Code	Description	Access Level
ASO_IB_RELATIONSHIP_TYPES	Types of relationships that appear on the Install Base Relationships page	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	User
ASO_LINE_ITEM_ACTION	Type of actions available in the Actions menu on the Lines page	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 window through the Customer History window	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
ASO_PAYMENT_TYPE	Payment types available to users	System
ASO_PQUOTE_OUTPUT_FMT	List of report formats in which a quote can be printed	User
ASO_PQUOTE_TEMPLATES	List of report templates to print a report	User
ASO_PQUOTE_XSL_FMT	List of XML Publisher formats in which a quote can be printed	System

Lookup Type Code	Description	Access Level
ASO_PRICE_TAX_COMPUTE_OPTION	Lists the pricing and tax computation options	System
ASO_PRICE_TAX_STATUS_INDICATOR	Lists the pricing and tax status indicators	System
ASO_PRODUCT_SOURCE	Types of product sources available on the Search and Select Product page	User
ASO_QUOTE_ACTION	Types of actions available on the Overview page. 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
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 pages 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. Predefined values include: Quote, Order, and Customer Product.	System

Lookup Type Code	Description	Access Level
ASO_SERVICE_VALIDATION_TYPE	Validation used for ordering services on a quote	System
ASO_SUP_COMPONENT_TYPE	Sales supplement data component type	System =
ASO_SUP_PRESENTATION_STYLE	Sales supplement data presentation style	System
ASO_SUP_RESPONSE_TYPE	Sales supplement response type	System
ASO_SUP_SECTION_COMPONENT_TYPE	Sales supplement section component type	System
ASO_SUP_TEMPLATE_CONTEXT	Sales supplement application values	Extensible
ASO_SUP_TEMPLATE_QUOTE	Sales supplement template	Extensible
ASO_TEAM_ASSIGN	Provides list of values for the profile option ASO: Automatic Sales Team Assignment	System
ASO_TSN_TYPE	Determines whether the TSN type is ship method, payment term, or freight term	System
ASO_VIEW_SALES_CREDITS	Provides the values for the profile option ASO: View Sales Credits	System
ASO_PREVIEW_CONTRACT_OPTIONS	Provides options that can be configured to preview contracts from Oracle Quoting	User

Lookup Type Code	Description	Access Level
CHANGE_CODE	Provides the change reason when you change the price in a quote without providing a change reason	Extensible

E

Predefined Attributes in Oracle Approvals Management (AME)

This appendix covers the following topics:

- Commonly Used AME Predefined Attributes
- Mandatory Predefined AME Attributes
- Nonmandatory Predefined AME Attributes

Commonly Used AME Predefined Attributes

Table AME Predefined Attributes for Oracle Quoting, page E-1 displays predefined, 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.

AME Predefined Attributes for Oracle Quoting

Attribute	Level	Description	Attribute Type
Quote Total	Header	Total quote amount. Includes shipping and freight charges and taxes.	Currency

Attribute	Level	Description	Attribute Type
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 or 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)
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)

Attribute	Level	Description	Attribute Type
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 or removed from a Quote or new clauses added to a template after instantiation	String (List of Values, when available)
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 Predefined AME Attributes

AME requires calling applications to display specific mandatory attributes. All of these attributes are at the header level. Table AME Mandatory Predefined Attributes, page E-4 lists predefined values and attribute types for these mandatory attributes.

AME Mandatory Predefined Attributes

Attribute	Attribute Type	Description	Value
ALLOW_DELETING_RULE_GENERATED_APPROVERS	Boolean	Determines whether AME enables the integrating application to suppress from a transaction's approver list the approvers required by the transaction type's rules.	False
ALLOW_REQUESTOR_APPROVAL	Boolean	Determines whether AME enables a requestor to approve their own transaction, if they have sufficient signing authority.	True
AT_LEAST_ONE_RULE_MUST_APPLY	Boolean	Determines whether AME raises an exception when no rules apply to a transaction at run time.	False
EFFECTIVE_RULE_DATE	Date	Determines which rules are active for a given transaction.	select ame_util.versionDateToString(sysdate) from dual
TRANSACTION_DATE	Date	Indicates the date the quote is submitted for approval.	select ame_util.versionDateToString(sysdate) from dual
TRANSACTION_GROUP_ID	Number	Determines the business group ID in which transaction occurred.	Null

Attribute	Attribute Type	Description	Value
TRANSACTION_ORG_ID	Number	Indicates the organization ID of the quote.	select org_id from aso_quote_headers_all where quote_header_id = :transactionId
TRANSACTION_SET_OF_BOOKS_ID	Number	Indicates the set of books ID in which transaction occurred.	Null
TRANSACTION_ID	Number	Indicates the quote header ID.	Not set
EVALUATE_PRIORITIES_PER_ITEM	Boolean	Determines whether AME evaluates the applicable rules' use priorities per item.	False
REJECTION_RESPONSE	String	Determines how AME responds when an approver rejects an item.	Stop all processing
REPEAT_SUBSTITUTIONS	Boolean	Determines if AME must apply substitution rules on ad hoc insertions and surrogate approvers	False
USE_RESTRICTIVE_ITEM_EVALUATION	Boolean	Determines whether AME requires a single subordinate-level item to satisfy all conditions on attributes belonging to the subordinate item class, in a given rule, for the rule to apply.	True

Attribute	Attribute Type	Description	Value
USE_WORKFLOW	Boolean	Indicates whether AME should log the transaction type's exceptions to the Workflow exception stack.	True
WORKFLOW_ITEM_TYPE	String	Indicates the item type of the integrating application's workflow.	select fnd_profile.value('ASO_APPR_WF_ITEM_TYPE') from dual
WORKFLOW_ITEM_KEY	String	Indicates a transaction's item key in the integrating application's workflow.	select object_approval_id||'HED' from aso_apr_obj_approvals where object_id=:transactionId\n\ and approval_status='PEND'

Nonmandatory Predefined AME Attributes

The following predefined AME attributes are not mandatory, but may be required under certain circumstances. Table Nonmandatory Predefined AME Attributes, page E-6 displays the predefined values for Oracle Quoting.

Nonmandatory Predefined AME Attributes

Attribute	Attribute Type	Description	Value
INCLUDE_ALL_JOB_LEVEL_APPROVERS	Boolean	Determines if all approvers with the same job level should be included when building the chain of authority for the action types that depend on Job Level.	False

Attribute	Attribute Type	Description	Value
JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID	Number	If this attribute is not null, the approver it identifies will be used as the starting point for action types that depend on Job Level.	Null
ALLOW_EMPTY_APPROVAL_GROUPS	Boolean	Determines whether to allow approval groups to have no members.	True
TOP_SUPERVISOR_PERSON_ID	Number	Indicates the person ID of the employee at the top in the HR supervisory hierarchy.	Not set
TRANSACTION_REQUESTOR_PERSON_ID	Number	Indicates the person or FND user ID of the requestor.	select employee_id from fnd_user where sysdate between start_date and nvl(end_date,sysdate) and user_id = nvl ((select requester_userid from aso_apr_obj_approvals where object_id = :transactionId and approval_status = 'PEND'), FND_GLOBAL.USER_ID)

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Category Set Usage in Quoting

This appendix covers the following topics:

- Overview of Category Set Usage
- Category Set Usage in the Pages User Interface
- Category Set Usage in the Windows 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 Pages User Interface

The following table lists the fields affected by the category set.

Page UI 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. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Search for Trade-in product from the Install Base	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Reconfiguration from Install Base	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Specify Service Reference when searching the Install Base for a Serviceable product	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.

Search 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 Windows User Interface

The following table lists the fields affected by the category set.

Windows UI 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	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.

Search Context	Description of category set usage
Search for Trade-in product from the Install Base	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Reconfiguration from Install Base	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Specify Service Reference when searching the Install Base for a Serviceable product	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Specify Service Reference when searching Pending Orders for a Serviceable product	• The product category LOV shows all categories belonging to the category set. • The product category LOV only shows categories (for the category set) that contain at least one product. • The list of products is filtered based on the category set.
Add Related Products	The category set is not used when searching for related products.

Search Context	Description of category set usage
Product LOV in the Quote Search window	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*.
Quote Approvals setup	The predefined product category attribute is based on the category set.

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