



Sales Quote Wizard

Benefits

- Extremely easy to use
- Configures itself to your system setup
- Close to zero implementation effort
- Easy to customize
- Cuts down data entry time
- Eliminates re-keying errors
- Lets you automate sales quote preparation
- Correct errors quickly

Feature Overview

- Based on MS-Excel
- Control the entire process from the spreadsheet
- Forms assist with data entry validation and error correction
- Two way interface between Excel and Oracle
- Delete errors, correct and reload in minimal time
- No need to log into Oracle Applications
- Able to Create, update or delete quote lines

Sales Quote Wizard allows you maintain your Oracle Order Capture quotes from Excel. Forget about manual data entry when you can now download sales quote information into Excel, make the necessary changes using the flexibility of Excel and then upload the changes directly into the Oracle Order Capture module. It is robust, easy to use, fast and flexible.

Enjoy the smoothest integration from your desktop to Oracle Order Capture.

| Sales Quote Results | | | | Header | | | | | |
|---------------------|--------------------|---------------|----------|--------------|------------|--------------|---------------|------------|---------|
| Upload Status | Upload Line Status | Quote Message | Quote ID | Quote Number | Quote Name | Quote Status | Quote Version | Order Type | Custom |
| LOADED | LOADED | | 7164 | 7169 | | | 1 | Order Only | A. C. N |
| LOADED | LOADED | | 7165 | 7160 | | | 1 | Mixed | ABC A |
| LOADED | LOADED | | 7166 | 7161 | | | 1 | Mixed | 2001 A |
| LOADED | LOADED | | 7167 | 7162 | | | 1 | Standard | Genera |
| LOADED | LOADED | | | | | | | | |
| LOADED | LOADED | | 7168 | 7163 | | | 1 | Mixed | 2001 A |
| LOADED | LOADED | | 7169 | 7164 | | | 1 | Mixed | Genera |
| LOADED | LOADED | | 7170 | 7165 | | | 1 | Mixed | A. C. N |
| LOADED | LOADED | | 7171 | 7166 | | | 1 | Web | ABC A |
| LOADED | LOADED | | 7172 | 7167 | | | 1 | Mixed | 2001 A |
| LOADED | LOADED | | 7173 | 7168 | | | 1 | Mixed | A. C. N |
| LOADED | LOADED | | 7174 | 7169 | | | 1 | Mixed | ABC A |
| LOADED | LOADED | | 7175 | 7170 | | | 1 | Mixed | 2001 A |
| LOADED | LOADED | | 7176 | 7171 | | | 1 | Mixed | Genera |
| LOADED | LOADED | | | | | | | | |
| LOADED | LOADED | | 7177 | 7172 | | | 1 | Web | Genera |
| LOADED | LOADED | | | | | | | | |
| LOADED | LOADED | | 7178 | 7173 | | | 1 | Standard | Genera |
| LOADED | LOADED | | 7179 | 7174 | | | 1 | Mixed | 2001 A |
| LOADED | LOADED | | 7180 | 7175 | | | 1 | Web | Genera |
| LOADED | LOADED | | 7181 | 7176 | | | 1 | Mixed | A. C. N |

Architecture

- Compatible with Microsoft Excel 2000 and later versions
- R11i to R12
- Uses Oracle Applications function security
- XML Web-based Communication
- No client install
- Install and setup in minutes
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Sales Quote Form

- Pricing options can be set
- Fields colour coded to indicate if mandatory or optional
- Pop-up calendars for dates
- All LOV fields validated
- Forms and upload validation

Download

- Existing quotes can be extracted from Oracle Order Capture
- Information can subsequently be modified and re-loaded
- Users can download data through the 'Sale Quote Download' form or from criteria within the workbook.

Customize Columns

- Set columns as mandatory on the worksheet.
- Remove columns not required on your worksheet
- Modify the column comment (which appears on the worksheet) to provide an explanation to your users.
- Change the label on the worksheet to be more meaning full to your users.

| Column | Mandatory | Remove | Label | Comment |
|--------------------|-----------|--------|---------------------|-----------------------------------------------------------------------|
| Upload Status | | No | | This column indicates the status of the header record. |
| Upload Line Status | | | | This column indicates the status of the line record. |
| Quote Message | | | | This column is used to return error messages to the spreadsheet. An e |
| Quote ID | | | | The quote_header_id that is returned when a validated row is process |
| Quote Number | | | | Quote number. Quote number and quote version uniquely identify a q |
| Quote Name | | | | Quote name. Corresponds to ASO_QUOTE_HEADERS_ALL.quote_narr |
| Quote Status | | | | Quote status. Corresponds to ASO_QUOTE_HEADERS_ALL.quote_sta |
| Quote Version | | | | Quote version. Quote number and quote version uniquely identify a q |
| Order Type | | | | The order type of the Quote. Order type ID. Corresponds to ASO_QU |
| Customer Name | | | | Party name for sold to customer account of type person or organizati |
| Customer Number | | | | Account number for the sold to customer account. Corresponds to AS |
| Creation Date | | | | Quote creation date. Corresponds to ASO_QUOTE_HEADERS_ALL.cre |
| Expiry Date | | | | Date the quote expires. Corresponds to ASO_QUOTE_HEADERS_ALL |
| Requested Date | | | Expected Order Date | Requested shipment date. Corresponds to ASO_SHIPMENTS.request |
| Sales Person | | | | Primary sales representative name. Corresponds to ASO_QUOTE_HEA |
| Price List | | | | Price list used to price the quote. Corresponds to ASO_QUOTE_HEA |
| Currency | | | | Currency code. Corresponds to ASO_QUOTE_HEADERS_ALL.currency |
| Sales Channel | | | | Sales channel code. Corresponds to ASO_QUOTE_HEADERS_ALL.sale |
| Source Name | | | | Source of the quote. Corresponds to ASO_QUOTE_HEADERS_ALL.quc |

Example Worksheet

Below is an example of the Sales Quote Wizard worksheet, showing several quotes being loaded into Oracle Order Capture.

The status columns enable the user to quickly see the progress of the records. You can see that eight rows have been successfully loaded and one has been rejected. The rejected row can be quickly corrected and loaded.

| Sales Quote Results | | | | | | | | | | | | |
|---------------------|--------------------|---------------|----------|--------------|------------|--------------|---------------|------------|-----------------|-----------------|---------------|-------------|
| Upload Status | Upload Line Status | Quote Message | Quote ID | Quote Number | Quote Name | Quote Status | Quote Version | Order Type | Customer Name | Customer Number | Creation Date | Expiry Date |
| LOADED | LOADED | | 7182 | 7177 | | 1 | | Order Only | A. C. Networks | 1143 | 7/4/2011 | 9/4/2011 |
| LOADED | LOADED | | 7183 | 7178 | | 1 | | Mixed | ABC Application | 2636 | 7/4/2011 | 9/4/2011 |
| REJECTED | REJECTED | Error :PROGRA | | | | 1 | | Mixed | 2001 AUDIO VID | 4091 | 7/4/2011 | 7/3/2011 |
| LOADED | LOADED | | 7184 | 7179 | | 1 | | Standard | General Technol | 1007 | 7/4/2011 | 9/4/2011 |
| LOADED | LOADED | | | | | | | | | | | |
| LOADED | LOADED | | 7185 | 7180 | | 1 | | Mixed | 2001 AUDIO VID | 4091 | 7/4/2011 | 9/4/2011 |
| LOADED | LOADED | | 7186 | 7181 | | 1 | | Mixed | General Technol | 1007 | 7/4/2011 | 9/4/2011 |
| LOADED | LOADED | | 7187 | 7182 | | 1 | | Mixed | A. C. Networks | 1143 | 7/4/2011 | 9/4/2011 |

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