

# ORACLE QUOTING



Oracle® Quoting is the sales application that provides capabilities to automate and manage the information exchange and negotiation that are part of the sales quoting process.

## KEY BUSINESS BENEFITS

- Reduced operational costs through sales process integration, reduced quoting errors and one click order conversion.
- Enhanced customer service through selection of the right product at the right price and quote collaboration.
- Increased revenue through targeted cross/up selling, margin maximization and quote performance analysis.

## KEY FEATURES

- Streamlined user interface.
- Create and update quotes from multiple operating units.
- Selection and editing of individual pricing modifiers and charges.
- TCA integration to improve customer data quality management.
- Header and line data defaulting rules.
- QA Check and Quote validation framework.
- Automatic reassignment of quotes using Oracle Territory Manager.
- Enhanced search filters for quotes, customers and services.
- Capture of end user information for multi-tiered selling models.

## Increase Velocity of the Sales Process

Oracle Quoting integrates quote creation directly into your sales process. By allowing your quotes to be delivered faster, more accurate and in compliance, Oracle Quoting helps increase the speed and efficiency of your sales process. It does this through the following capabilities:

- Integration with the sales opportunity to provide a seamless information transfer.
- A robust set of product selection, configuration and pricing capability to match valid products/services to customer needs.
- A complete approval workflow to ensure that every quote receives the correct level of scrutiny.
- Integration with Order Management to provide a direct connection to the downstream order-to-cash process.

With Oracle Quoting you can realize the following benefits:

- Reduced operational costs through sales process integration, reduced quoting errors and one click order conversion.
- Enhanced customer experience through selection of the right product at the right price, using collaboration to communicate quickly to the right people.
- Increased revenue through targeted cross/up selling, margin maximization and quote performance analysis.

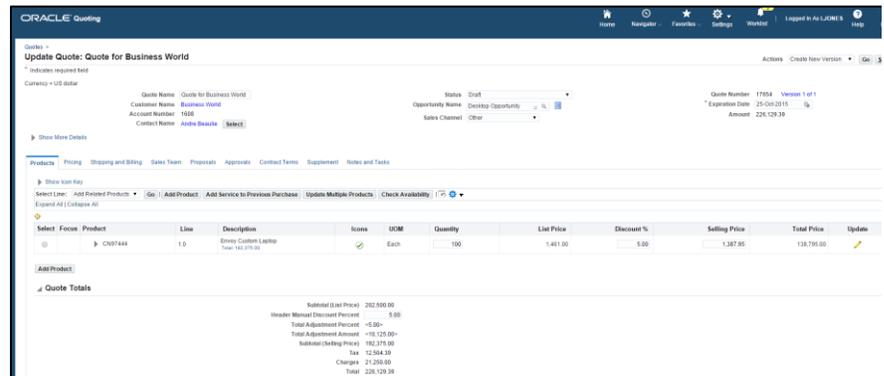


Figure 1. Manages your entire quote process right within your sales workflow

## Reduce Operational Costs

### Streamline Quote Creation with Templates

Oracle's centralized quote template repository gives your sales force a head start with ready-made templates for the most common or complex sales scenarios. These templates speed quote creation with pre-configured product selections, and multiple templates can be applied to quotes to mix and match product configurations to customer needs.

### Eliminate Redundant Data Entry with Opportunity to Quote Conversion

Oracle Quoting reduces the salesperson's workload by reusing previously captured information when converting opportunities to quotes. The application automatically transfers product mix, sales team and other opportunity-specific information directly into the quote. Oracle Quoting frees salespeople from redundant data entry so they can focus on winning the deal.

### Enforce Pricing Compliance with Quote Approval Process

The Oracle Quoting extensible approval process ensures that discounting stays within bounds. The application can trigger approval rules based on any quote attribute, such as manually applied discounts or changes to contractual terms. Oracle's human resources hierarchy provides out-of-the-box structures for approval routing. The approvals engine allows commenting, approval history tracking, and approver skipping—allowing salespeople the appropriate amount of pricing freedom while enforcing compliance.

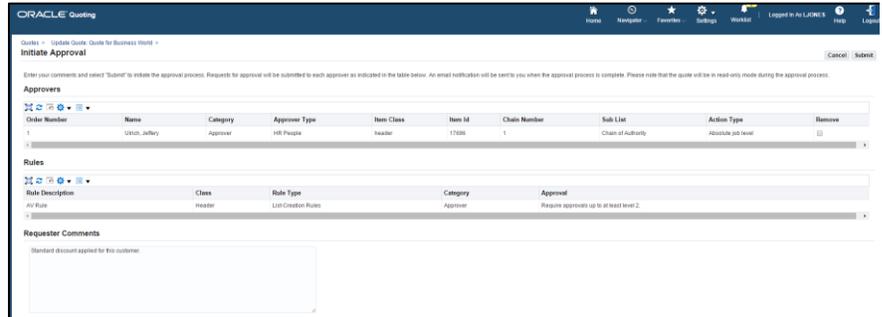


Figure 2. Automatically trigger approval rules and route to the appropriate parties

## Integrate your SFA system with Oracle Quoting API

Oracle Quoting integrates with any SFA system to make quotes a seamless part of your sales process. The application uses published Application Program Interfaces (APIs) to interface with third party applications and an easily configurable Web interface to give users a familiar look and feel. Administrators can enable or disable buttons and menu options to match your sales process. You can further streamline the Quoting cycle by selectively disabling features such as Manual Price Overrides, Trade-In Products, Approver Skipping, Sales Supplement and Web Publishing.

## Enhance Customer Service

### Turn Customer Needs into Valid Product Configurations with Guided Selling

The Oracle Quoting guided selling engine ensures the validity of quoted product configurations. The quoting “wizard” walks users through configuration step by step, while experienced users can choose to configure on a single screen. The system checks product availability, lead time and even customer credit status. With Oracle Quoting you can address these potential issues before the quote is delivered to your customer.

### Simplify Quote Distribution with Web Publishing and Advanced Printing

Oracle Quoting delivers quotes via web portal or email—right from within the application. Salespeople can publish quotes to the Web so that customers can securely review them and place orders right from the website. Salespeople can also print quotes in PDF or RTF format. The Oracle Quoting printing templates fine-tune the level of delivered detail, including supplemental and contractual information. Oracle Quoting delivers personalized, professional-looking quotes via the customer’s preferred channel—including email and Web.

### Enable Collaborative Selling with Quote-Sharing

Oracle Quoting makes it easy for field reps, inside reps and even customers to collaborate on quotes and orders. Quotes created by a rep can be published on the Web for immediate access by customers and others involved in the deal. For example, an outside rep can create the initial quote and publish it. The customer can then view the quote and request live help from an inside sales rep to modify the quote and place the order. Seamless quote-to-order conversion transfers all relevant information to the order management system for order fulfillment.

**ORACLE QUOTING**

Oracle Quoting improves the quoting process through enhanced usability, productivity and accuracy.

**RELATED PRODUCTS**

Oracle Quoting is integrated with these Oracle applications to implement a complete quoting process

- Oracle Sales
- Oracle Order Management
- Oracle Advanced Pricing
- Oracle Configurator
- Oracle iStore
- Oracle Sales Contracts
- Oracle Approvals Management
- Oracle Incentive Compensation
- Oracle Territory Manager
- Oracle Proposals
- Oracle Workflow
- Oracle Human Resources

**RELATED SERVICES**

The following services support Oracle Main Product:

- Update Subscription Services
- Product Support Services
- Professional Services

**Increase Revenue****Maximize Margins and Ensure Compliance with Integrated Pricing**

Oracle Quoting automatically applies corporate pricing policies to yield the correct price quotes for each customer and maximize margins. The pricing engine dynamically discounts or surcharges based on customer, product, quantity, price lists, promotions, and negotiated agreements. The application handles simple quantity price breaks and custom formulas for rapidly fluctuating commodity prices with equal ease. With Oracle Quoting, the most accurate and up-to-date information available is automatically priced into every quote.

**Increase Average Order Size Through Cross and Upsell**

Oracle Quoting displays cross/up sell products that are related to the selected line item. The relationship type, description, availability and price are displayed and users can easily add one or multiple cross/up sell products to the quote by selecting a check box. Cross-sell and up-sell recommendations ensure that your salespeople never miss an add-on selling opportunity.

**Incentivize selling high margin products**

Oracle Quoting displays cost and margin details in the quote. Business rules can be setup to include approvers based on the quote margins. The QA check feature applies business rules prior to key quote actions such as approval submission and place order.

**Oracle E-Business Suite — the Complete Solution**

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

**CONTACT US**

For more information about Oracle Quoting, visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.

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