

# ORACLE QUOTING INFORMATION DISCOVERY



Oracle® Quoting Information Discovery allows quoting users to analyze the quote to order lifecycle. It tracks metrics such as average time to convert a quote to an order, the quote conversion percent, the impact of discounting on quote conversion and other key indicators of quoting performance. The key metrics can be viewed in an easy to use dashboard, with drill-through to the underlying quote in Oracle Quoting.

### KEY BUSINESS BENEFITS

- Increase revenue and improve margins
- Provide answer to “What quote should I work on today?”
- Seamless integration with Oracle Quoting

### KEY FEATURES

- Simple and intuitive interface
- Search for quotes using quote header and line flexfields.
- Perform several quote actions without drilling into the quote.
- Monitor the quote conversion process.
- Create a quote, drill into it and update it.
- Compare two or more quotes or quote lines.
- View customer locations on a map.

### Increase Velocity of the Sales Process

Oracle Quoting Information Discovery is a useful complementary application to Oracle Quoting. It is targeted at the day-to-day operational quoting user and the Sales Manager. It leverages the quote security model allowing Sales managers to view their quotes and their team’s quotes. It allows seamless navigation to the quotes in Oracle Quoting. It helps the user find the correct quote using several quote header and line attributes including flexfields. The user can create a quote, drill into a quote and update it. Additionally, the user can compare two or more quotes, two or more quote lines belonging to the same or different quotes. Users can view addresses associated with the quotes on a map to determine geographical proximity. This will be useful when arranging customer visits. Also, when launching a product campaign targeted based on the location of the customers.

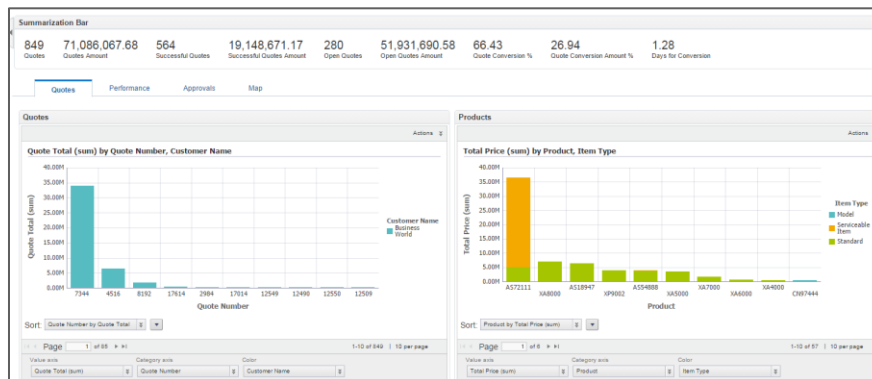


Figure 1. Quote totals by Quote and Quote totals by Products

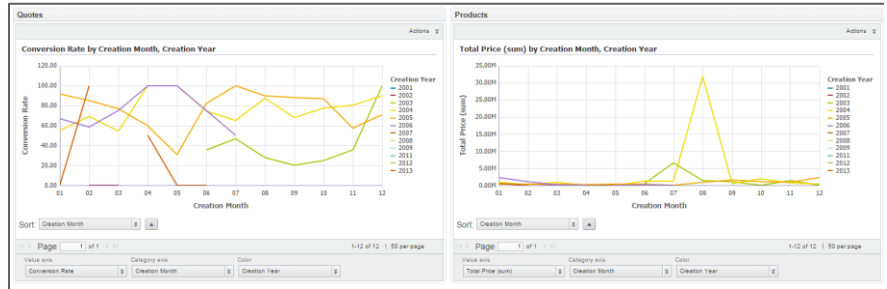


Figure 2. Quote conversion trends by month and year

## Increase Revenue

Focus sales force on top revenue potential

Sales Managers can monitor quotes based on quote total, quote margins. By viewing historical data for successful quotes, they can ensure that each active quote has the correct sales team to close the deal. Users can view quote conversion trends by month and year.

Identify and target high value quotes

Quoting users can view high value active quotes and focus on closing them. They can view successful quotes for a given customer and the conversion percentages to prioritize them accordingly.

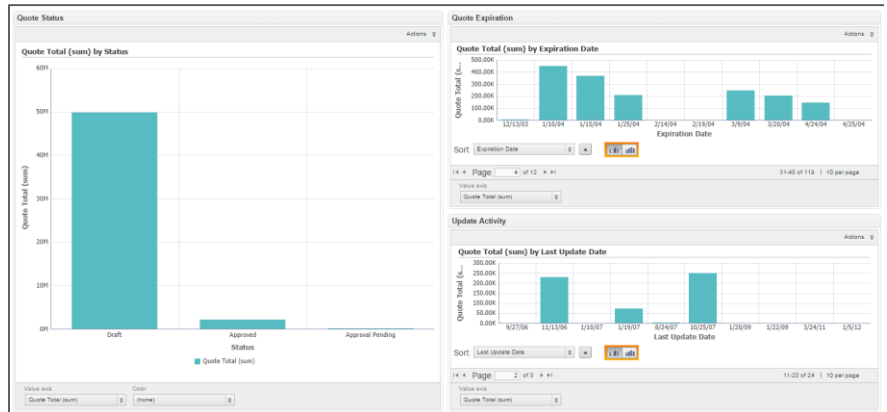


Figure 3. Guide user to the quotes that should be worked on today

## Improve Margins

Reduce the average time to convert a quote to an order

Oracle Quoting Information Discovery guides users to the quotes that should be worked on to ensure that quotes are not left dormant. If a quote approval is taking too long, the user can send a reminder to the approver to move it along. If the quote is with the customer awaiting approval, they can drop a note to the customer.

Improve margins by analyzing the impact of discounts on quote conversion

Users can view the historical quote totals by applied quote discounts and determine the

**ORACLE QUOTING**

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

**RELATED PRODUCTS**

- Oracle Quoting
- Oracle Order Management

**RELATED SERVICES**

- Update Subscription Services
- Product Support Services
- Professional Services

optimal discount to ensure successful quote conversion. They can also view products and product categories that are selling well.

**Optimize the Quote-to-Order process****Improve day-to-day transactional quoting efficiencies**

Oracle Quoting Information Discovery helps determine what quotes should be worked on based on the quote total, the last time it was updated and the quote expiration date. Thus if a large quote is expiring soon, the user may want to work on that first. Or if a large quote has not been updated in a while you should look into why it is so. The quote status versus quote amount graph provides a quick way to focus on high value active quotes.

**Monitor the quote conversion process, enabling corrective action to be taken to reduce cycle times**

Oracle Quoting Information Discovery helps keep track of the active quotes through the quote lifecycle and makes sure that no quote is left behind. Quotes needing approval or waiting on a customer will show up in the dashboard.





**Enable sales managers to eliminate approval bottlenecks**

Sales managers can view quote approval times by approver and sales group. They can step in if needed to keep the approval process moving.

**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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