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You can also associate a proposal to a campaign activity in Oracle Marketing. Oracle Quoting User Guide . Oracle Quoting enables you to create and manage customer quotes across all sales and interaction channels and if approved by the customer, convert these quotes into orders.

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implementation steps correct and complete?

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Accessing the Oracle Quoting Forms User Interface. The Quoting form is your main workspace in the Forms UI. From this form you can create new quotes, query and modify existing quotes, view customer history, and print quotes, in addition to a number of other tasks. You must be logged in as a valid Forms Quoting user.

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

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You must have access to the operating unit in which the quote is created. If not, you cannot approve the quote. To approve a quote, navigate to Self Service Applications > Workflow Administrator Web Applications > Worklist. Notes. Click Here For Quote Details. If you are logged into Oracle Sales or the Oracle Quoting - HTML UI, the Update Quote page opens.

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Sales teams and territories are set up in Oracle Territory Manager. 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 as well as customers and geography. Quoting then uses these territories to derive sales teams for quotes. The following diagram shows how Quoting determines the initial quote sales team.

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