Oracle® TeleSales

Concepts and Procedures

Release 11*i*

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Part No. A86831-01

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Oracle TeleSales Concepts and Procedures, Release 11*i*

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Contents

Using Oracle TeleSales

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Preface

Welcome to the Oracle Customer Relationship Management**,** Release 11*i*, suite of applications.

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle TeleSales.

This preface explains how Concepts and Procedures is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- TeleSales Administrators
- TeleSales Managers
- TeleSales Agents

Structure

This manual contains the following chapters:

"Understanding Oracle TeleSales provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"Using Oracle TeleSales" provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Conventions

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

Understanding Oracle TeleSales

This topic group provides an overview of the application and its components, explanations of key concepts, features and functions, as well as the application's relationship to other Oracle or third-party applications.

What is Oracle TeleSales?

Oracle TeleSales is an integrated solution that allows agents to streamline the sales process from lead creation to order generation. Thus allowing better management of the sales process throughout the sales cycle. It contains a versatile set of sales tools that facilitate account, opportunity, and contact management as well as lead and order creation and generation. It provides a comprehensive solution for sharing information across sales channels to effectively manage and track the customer sales cycle and capitalize on up-selling and cross-selling opportunities.

When used in a CTI-enabled environment, Oracle TeleSales provides functionality for Automatic Number Identification (ANI), Dialed Number Identification Service (DNIS), and CTI-enabled screen pops containing customer information, making critical data readily available to agents during an interaction.

Oracle TeleSales is integrated with Oracle Marketing, Oracle Campaign Plus, and Oracle Predictive and dramatically improves the quality of the customer interaction by increasing agent productivity. Oracle Workflow serves as a companion module to Oracle TeleSales which facilitates the set up of telesales data such as, territory definition and assignments, as well as the importing of data. Other set up facilitated by Oracle Workflow includes, TeleSales Reporting, Sales Quota Management, and Sales Hierarchy.

Oracle TeleSales enhances customer relationships, improves customer loyalty and increases profitability through:

- Increased customer revenue

- Decreased sales cycles
- Reduced sales and service transaction costs
- Improved customer and employee operational efficiency

Oracle TeleSales provides the following tools to perform and support sales activities:

- Event Registration and Management
- Business-to-Business and Business-to-Consumer Models
- Collateral Fulfillment
- Globalization
- Lead Management
- Lookup Management
- Opportunity Management
- Organization and Contact Management

The integration of Oracle TeleSales with other Oracle applications provides the following capabilities:

- Quote and Order Management
- Quote Configuration
- Outbound Calling Campaigns and Integration with Oracle Advanced Outbound
- Personal Productivity (Work Queue, Preferences and Profile)
- Pipeline and Forecast Management
- Workforce Administration
- Reporting
- Resource Management
- Territory Management
- Shared Notes and Interactions across the enterprise

Who are Users of Oracle TeleSales?

Oracle TeleSales users are able to work in concert with other sales channels including field sales. Agents within a call center are able to share customer information within these sales channels. The ability to share this information leverages the field and facilitates the sales cycle by providing customer information across the sales force and business channels. Customer information as well as customer interactions are available, allowing the sales force to focus on meeting customer needs and corporate objectives.

There are several types of users who will use and benefit from Oracle TeleSales. They are:

- Agents

  Outbound agents who's responsibilities include generating sales leads, qualifying prospects, following up on sales leads and closing sales. Initiate prospect interest and analyze prospect needs. Inbound agents whose responsibility is to take incoming calls, respond to requests, and create orders.

  Each type of agent directly interacts with field sales representatives, sharing prospect information with channel partners. Additionally, and complete campaign fulfillment by mailing campaign, marketing, and sales literature to prospective customers.

- Sales Representatives

  Responsible for selling of products and services to end users. Sell via outbound and inbound phone calls, e-mail, etc. Take the qualified lead and market products/services to prospects -- close the sale. Responsible for developing long term business partnerships. Interface with all business channels and peers to satisfy business objectives, make sales, increase revenue.

  Salespeople using Oracle TeleSales have access to a wide variety of customer information. Information such as products previously purchased, notes from interactions with a field salesperson or distributor, outstanding service issues, and credit history, are all available through TeleSales application. Salespeople can use this information to enhance the caller's buying experience, as well as to cross-sell and up-sell to increase revenue.

- Distributors and Resellers

  Improved business-to-business and business-to-consumer relations and sales activities are facilitated through channel and partner relationship management. Distributors and resellers can capitalize on these opportunities through Oracle TeleSales.

- Managers

  Establish quotas. Create Forecast and Activity reports. Manage and monitor employee performance. Review ACD reporting, measure performance and effectiveness, and forecasts.

Dependencies and Integration

Oracle TeleSales is designed to meet the needs of agents and inside salespeople via a sales and service centric design and interface. It includes a versatile set of tools to effectively track, manage, and execute throughout the entire customer sales cycle, including account management, opportunity management, contact management, quote generation and order creation. Oracle TeleSales is integrated with the following Oracle applications:

- Oracle Advanced Outbound
- Oracle Configurator
- Oracle CRM Foundation Modules
  - Interaction History
  - 1-to-1 Fulfillment
  - Resources
  - Task
  - Territory Manager
  - Calendar
  - Notes
- Oracle TeleService
- Oracle Sales Online
- Oracle iPayment
- Oracle Marketing Online
- Oracle Sales Compensation
- Oracle Scripting
- Oracle Service
- Oracle iStore

- Oracle Advanced Inbound
- Oracle Interaction Center
- Oracle Workflow

Supporting B2B and B2C Business Models

The business-to-business and business-to-consumer models are supported in Oracle TeleSales. This flexibility allows agents to manage and track sales efforts for either or both models. They can easily and quickly enter orders, locate product information, enter billing and shipping data, as well as payment information. Contact profiles include the ability to restrict contact; do not call and do not mail functionality, adhering to privacy regulations.

Navigator

The navigator displays:

- Icons that represents each functional area
- Drop-down lists of views relating to each functional area
- Hierarchical list of functions that relates to the selected view
- Nodes in each hierarchy representing each related record in the database

Once a functional area for viewing is chosen, an expanded view of the hierarch is achieved by double-clicking the node. The functional window is accessed by double-clicking on the data node.

Right-click a node to perform any of the following actions:

- Open the selected functional window
- Conduct a search
- Copy the selected node
- Refresh the list

Universal Searches

Performing a universal search is essential for locating organizations and contacts and segregating data. Many different types of searches can be performed through

Universal Search (e.g., by lead, opportunity, collateral, organization, contact, person or event).

Before entering new a new organization or contact, you should always perform a search first to verify that it currently does not exist in the database and thereby ensuring a duplication in the database does not occur. As a means of best practice, when performing a search, enter as many fields as known. This should apply even if complete information does not exist, i.e., the list name starts with ’S’, enter ’S(%) as a wild card.

A universal search can be initiated by either selecting the flashlight icon on the toolbar or from the Find button in eBusiness Center. This is because you must enter at least the basic information about an organization before you can enter a business contact, a lead, and an opportunity. If you wish to enter a new business contact, then you should search for both the contact name or their organization. If neither is found, then an new entry will be needed.

Note: .The search criteria and results are specific to the item you are looking for and returned in a customizable Bali table.

Searches can be performed at a basic or advanced level and search criteria and results can be saved for later use. For example, if you wish to send out collateral every week to all new contacts, you can reuse the saved search criteria. Saving the results of your search as a list can be reused later or exported. You may wish to save a list of key contacts for weekly follow-up. The saved list can be used for such tasks as collateral fulfillment, follow-up, or event registration.

Understanding eBusiness Center

The eBusiness Center is a dynamic workspace containing a versatile set of tools for creating and managing organizations and contacts. It also serves as a central place for creating and managing leads and opportunities as well as collateral fulfillment and event management. Notes can be entered and viewed in eBusiness Center for all interactions, leads, opportunities, events, and can be assigned to an organization or customer.

Note: Changes made in eBusiness Center are real-time. An agent can use eBusiness Center to correct information for a person or contact, an organization, or a contact at an organization as well as relationships. In addition to changing information, new persons, organizations, and relationships can be created from eBusiness Center.

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eBusiness Center is constructed based on the TCA 11*i* Customer Model, utilizing the 'party' concept. This concept enables all business entities to be handled in the same way, regardless of type (i.e., organizations, contacts, groups, and relationships). All entities reside within the same physical table in the database. Although the entities are treated equally, each has its own distinct party type and party ID. For example, Sam as an employee of Storage Solutions would represent three parties: the first party is Sam (the person), the second is the company he works for, Storage Networks (the organization), and the third is the relationship created by the association (Sam @ Storage Solutions). Address and other pertinent data can be directly associated to Sam @ Storage Solutions. An address can be associated to multiple parties, thereby reducing entry and the duplication of information.

The relationship party type is stored as a separate entity. The relationship between parties is many-to-many. Each relationship is defined by a relationship type which describes the link between the parties. Commonly, parties will have multiple relationships with each other. For example, Sam @ Storage Solutions works for Nathan who is also his father-in-law. Relationships can have the same attributes of other parties, e.g., contact points.

Contacts serve as a contact for another party, generally this is represented as a contact within an organization, but may also be a contact for another person. Attributes for a contact are specific the role of the contact (e.g., department or job title).

An account represents a business relationship for a party. It is possible for a party to have more than one account.

eBusiness Center Interface

The user interface consists of a main section and a series of tabs. In the main section of eBusiness Center, demographic data information as it pertains to the organization or contact will display. Radio buttons that indicate that relationship of the contact to an organization are featured in the View Details For portion of the main section. The tabs are labeled according to the function to be performed. There are twelve tabs available for selection. They include:

- Overview
- Organization
- Person
- Address
- Relationships
- Accounts
- Leads
- Opportunity
- Quote/Order
- Event
- Collateral
- Tasks

View Details For

This section of eBusiness Center consists of three radio buttons:

- Person
- Organization
- Relationship

The data represented in eBusiness Center will be associated to the view.

Overview Tab

The Overview tab allows you to view campaign information, launch scripts, notes, and interactions that pertain to the organization or contact. An agent may also add new notes for the party during an interaction.

Organization Tab

The Organization tab is used to enter and view profile information and contact points. An organization can vary in terms of business function. For example it could be a enterprise, e-commerce, for-profit company, not-for-profit agency, or branch of the governments. Here are a few things you should know about how the organization model is structured:

- Each organization must have a name and a primary address.
- Each organization can have multiple addresses and multiple contacts associated to each address.
- Each time you add a contact for the organization with a new business address, that address automatically becomes a new address for the organization.
- Each time you enter a contact with a new business phone number, that phone number automatically becomes one of the organization's phone numbers.
- You can enter optional information about an organization, including the number of employees, its revenue, business and tax codes.
- You can classify an organization in any way you wish, by entering its product interests, for example.
- You can assign a sales team to the organization automatically via the territory assignment program.
- You can create hierarchies of organizations by making consistent entries in the Parent Organization field.

  For example, if you sell to the Paris, France, branch of the Large Multinational Corp., which is headquartered in Hong Kong, you should enter the headquarters and the branch as two separate organizations.

  Enter the Hong Kong headquarters as one organization first. Enter Large Multinational Corp. Paris, France, as a second organization, with the Hong Kong headquarters as its parent.

Person Tab

The Person tab is used to view and enter a person or contact. A person or contact can be directly related to an organization or separate from an organization. It is also used to specify contact restrictions and methods. An agent can also use the tab to track interests, job/military experience, education, and leisure activities.

Address Tab

Agents use the Account tab to enter additional address, email, and phone numbers, including restrictions regarding their use.

Relationships Tab

The Relationships tabs is used to establish and define the relationship between parties. It is useful working with a complex organization or in certain consumer situations, where understanding the relationship between parties is helpful in managing the customer. These relationships are considered object and subject relationships. The parameters include:

- Object Type
- Subject Type
- Object Name
- Subject Name

For each relationship, start and end dates may be entered. These dates provide an historical view of the relationship. When a relationship between parties ends, it is suggested that an end date be used instead of deleting the relationship.

- Start Date
- End Date
- Status

Accounts Tab

The Accounts tab is used to view account detail and create new accounts.

Leads Tab

The Leads tab is used to view and manage leads. Leads are designed to capture the initial contacts with potential customers, gathering just enough information to tell a sales organization if a lead merits more sales resources, should be set aside for a later date, or abandoned entirely. See Understanding Lead Center for additional information about lead management.

Opportunity Tab

The Opportunity tab is used to view and manage sales opportunities. An opportunity takes the potential sale from a qualified lead through the negotiation stage. When a qualified lead is turned into an opportunity, all of the information is automatically carried over. See Understanding Opportunity Center for additional information about managing opportunities.

Quote/Order Tab

The Quote/Order tab is used to view, create, and update quotes and orders from opportunities, once the status is changed to 'won'. This tab links to Order Capture for creating of new orders. Order Capture integrates to iPayment, Order management. Order Management integrates with ERP Contracts and Pricing.

Event Tab

In Oracle TeleSales, the management and coordination of event activities is accomplished from the Events tab in eBusiness Center.

From Events tab, you can perform the following:

- Register Event Attendees
- Confirm Registrations
- Cancel Registrations
- Enter Payment Information
- View Event History
- Enter Contacts
- Search Events
- View Related Items
- Mass Event Registration
- Shopping Cart

Collateral Tab

The Collateral tab is used to fulfill collateral requests and manage collateral fulfillment activities to include:

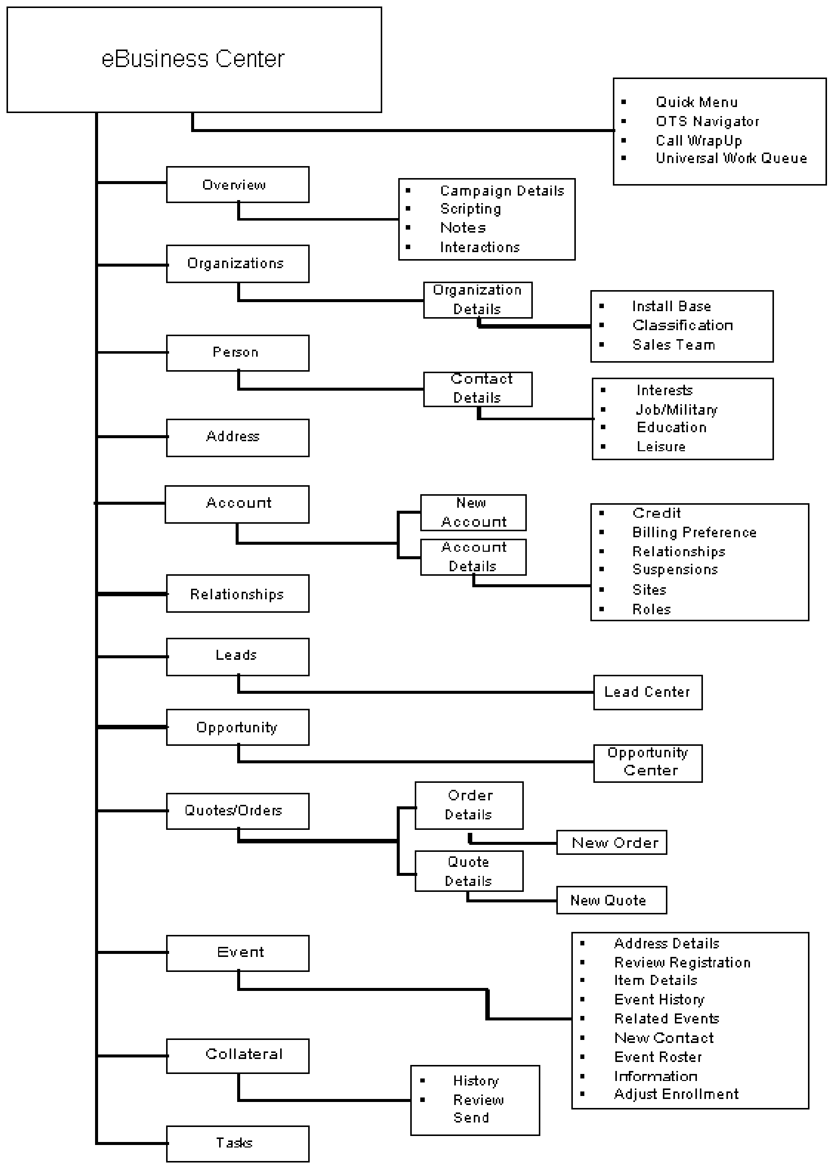
- Association of Collateral to Campaigns
- Collateral Fulfillment
- Searching Collateral
- Mass Collateral Requests and Fulfillment
- Review Requests
- View Collateral History

- Enter Shipping Information
- Collateral Availability
- Shopping Cart

Task Tab

The Task tab allows you to assign tasks to leads, opportunities, contacts, and organizations. Each task is handled by the Task Manager and can be viewed using the All Interactions feature within Oracle TeleSales.

eBusiness Center Process Flow



Understanding Lead Center

The Leads tab is used to view and manage leads. Leads are designed to capture the initial contacts with potential customers, gathering just enough information to tell a sales organization if a lead merits more sales resources, should be set aside for a later date, or abandoned entirely.

Agents use the Leads tab to gather lead information including:

- The products a customer is interested in purchasing
- The budget for each lead
- Capture people (contacts) associated to the lead
- The time frame for the sale
- Tasks relating to this lead
- Notes

Once agents have gathered enough key information, the lead can be assigned the status of **Qualified** and can be turned into an opportunity.

Agents use the Leads tab in eBusiness Center window to gather information about potential customers and their needs.

The agent can enter information about the marketing campaign, the contact's role, and information on the products the customer is interested in purchasing.

The criteria the application uses to qualify a lead is controlled by a set of rules that can be modified by the Oracle applications administrator using Oracle WorkFlow.

In addition to entering required lead information, the agent must evaluate the likelihood of a particular lead turning into a sale by assigning it a rank.

Ranking

Agents can let the application assign the rank automatically by clicking the **Rank Lead** button, or they can select a value manually from the **Lead Rank** drop-down list.

Note: .Users logged in under managerial responsibility must set up both the Lead Ranking Score Card and the rank mapping during implementation to enable automatic lead ranking.

Assigning Leads

Once leads are qualified, the territory assignment program can assign them to appropriate agents who manage the qualified leads and turn them into opportunities.

Creating Opportunities from Leads

When an agent attempts to create an opportunity from a lead, Oracle TeleSales automatically performs a check for existing opportunities to ensure that a duplication of the opportunity does not occur. This is performed through the Lead Linking module.

An agent with the privileges of a team leader can perform the following:

- Link the lead to the existing opportunity.

  Purchase and other information is not be transferred to the matching opportunity, but you can access the lead from the Leads tab of the opportunity you link it to.

- Copy purchase line items to the duplicate opportunity.

  The copied items are transferred to the potential purchases in the existing opportunity. The copy process removes them from the lead.

If an agent without the privileges of team lead identifies an opportunity that should be turned into a lead, the system will automatically reassign the qualified lead.

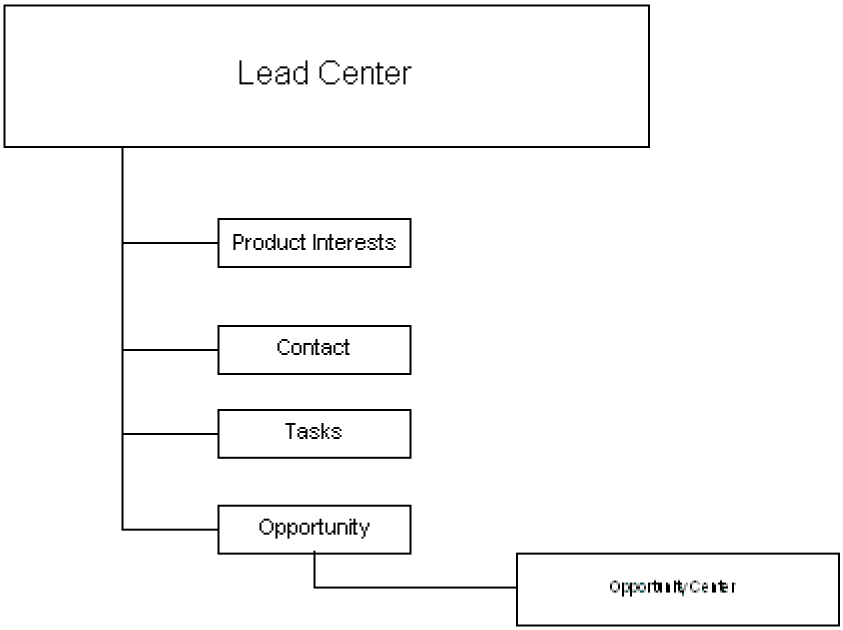
The sales representative creating the new opportunity becomes the leader of the opportunity team and can run the territory assignment program to assign other sales team members. Any team member required to make modifications to opportunity information, must be designated as a team leader.

The application automatically notifies new team members of the assignment via their work queues.

The team members use the opportunity as a repository for information on the negotiations, to prepare forecasts, and assign sales credit.

A team leader can decide to create a quote for a customer at any time. Quotes can be configured for all of the purchase items.

Lead Center Process Flow



Understanding Opportunity Center

The Opportunity tab is used to view and manage sales opportunities. An opportunity takes the potential sale from a qualified lead through the negotiation stage. When a qualified lead is turned into an opportunity, all of the information is automatically carried over.

The territory administration program automatically assigns a sales team to each new opportunity. The sales representative who creates an opportunity automatically becomes the team leader. The sales team leader can grant team leader privileges to multiple team members. Team leaders can modify opportunity information and assign sales credit to each participant. Other team members have view-only access.

The sales team uses the opportunity as a repository for information leading up to the preparation of an order.

New Opportunities

You can enter new opportunities from the Opportunity tab. The detail that you can enter for the opportunity includes the following:

Obstacles

Enter information about your competitors

Closing

- View and update closing information.
- View orders placed for won opportunities.
- View and add information about a competitor when you lose the opportunity.

Credit Total

View the total sales credits for a each sales team member.

Classification

Classify an opportunity according to categories defined by your implementation team. The values you enter here can be used to assign this opportunity to the appropriate sales team. If your company has a lead generation organization that forwards leads to you, then this window is likely to include information that they entered when the lead was created.

Sales Team

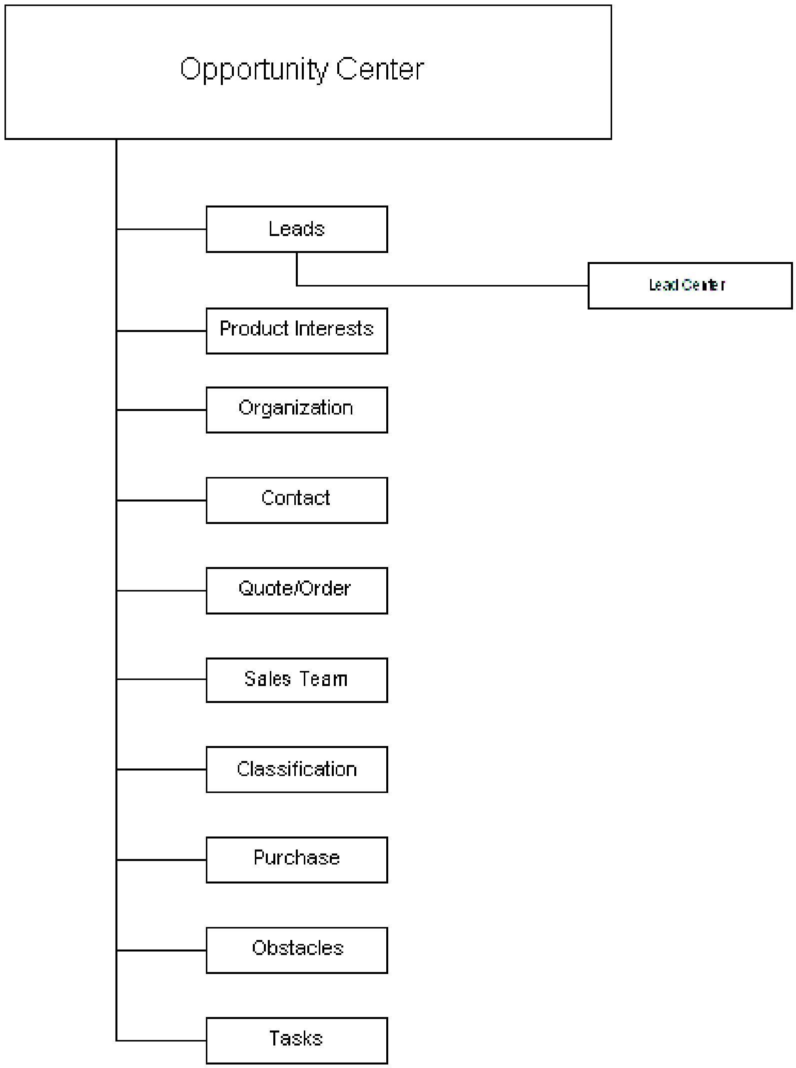
View and configure a sales team for the opportunity.

Attachment

View, add, and remove file attachments to the opportunity. You must be a team leader to modify attachments.

You can also create and manage attachments using CRM's attachments module.

Opportunity Center Process Flow



Universal Work Queue

Universal Work Queue is a single interface for all work items. It provides a unified and common view of agent work and simplifies multi-media access and reduces the complexity of working across business channels and tasks. All work assigned to an agent can be accessed and viewed. Media items include inbound, outbound, and e-mail.

The following is a representative list of the types of tasks that can be accessed and worked through Universal Work Queue:

- To-Do's
- Call Backs
- Leads
- Opportunities
- Quotes
- Personal Tasks

When an agent accesses Universal Work Queue, all work items will display in **My Work**. My Work is the work portal for selecting agent work. The total number of work items for each work type will display in the Count column of My Work. When an agent selects a work item, Universal Work Queue will launch the appropriate business application window for the media or task. Opportunities will take an agent to the Opportunity tab in eBusiness Center. Leads will take an agent to the Leads tab in eBusiness Center.

The **Get Work** button allows an agent to work within the same work type by gathering the next item to be worked. For example, an agent accesses the first lead assigned to them and turns the lead into an opportunity, the agent then selects Get Work and the next lead in their assignment is presented to them to work -- all without leaving the work portal.

Notes and Interactions

Notes are useful to an agent for capturing details about an organization or person, interactions, special instructions, etc. Not only are they a snapshot of information, they provide a historical view. An agent can enter a note for an organization or person from anywhere in Oracle TeleSales. To accomplish this, select the Notes icon from the toolbar.

Notes entered across the enterprise can be viewed by an agent in Oracle TeleSales. This is considered viewing 'all notes'. This can be accomplished by selecting the All Notes button in eBusiness Center, Lead Center, and Opportunity Center. The Summary tab in the Notes window contains a chronological listing of notes for the organization or person. An agent can modify the order they display by selecting or deselecting the Latest First checkbox. The Notes tab provides a single view of the note. In addition, the source and other critical information will display. For example, if a note was entered in Order Capture, the note source would indicate that the note originated in Order Capture.

Like notes, interactions can be viewed in Oracle TeleSales. and provide an agent with record of all customer-agent interactions and activities.

An interaction is a point of contact and may relate to customers, campaigns, agents, orders, quotes, etc. This point of contact could be a direct interaction with a customer, the customer's system, a potential customer, or through an automated agent. An interaction is generally timed and has an outcome or result that can be tracked. Multiple activities can occur during the course of a customer interaction. Each customer-agent interaction may include various forms of communication (i.e., media items).

An activity is a business act performed by an agent or automated agent as a part of a customer interaction. Interaction activities typically relate to the media item for which the activity occurred. Within the customer interaction, the interaction activity may involve how a media item was handled, (e.g., transferred call). It may also include details as it pertains to the Oracle TeleSales or another Oracle CRM application, (e.g., request for product information or balance inquiry).

Media items represent a media occurrence that is handled by an Oracle TeleSales or another Oracle CRM application or a user of the application. They can be generated by a customer directly, the agent, the system or the Oracle CRM application. Media items can be inbound or outbound. For example, an e-mail sent from an agent to a customer would be an outbound media item.

Using Oracle TeleSales

This topic group provides process-oriented, task-based procedures for using and completing essential business tasks.

Accessing Work via Oracle Universal Work Queue

After you log into Oracle Applications, you will access Universal Work Queue through the Navigator.

Prerequisites

Oracle Universal Work Queue must be implemented and you must be working in a CTI-enabled environment.

Steps

1. Login to Oracle Applications.
2. Select **Universal Work Queue** from Navigator.

   All work items in the queue for the agent will display under My Work in Universal Work Queue.
3. From **My Work**, select the work type to handle.

   Work items are grouped by Tasks, Defects, Service Requests, Leads, Opportunities, and Forecasts.

   Once you select the work type, the associated work items associated will display in the right pane of Universal Work Queue.
4. Select the work item to be worked.
5. Select the **Get Work** button.

   The system will take you to the appropriate form the work type. For example, if the work type selected was Opportunities, the system would take you to the eBusiness Center in Oracle TeleSales and display the details associated to the opportunity selected for working.

Performing a Universal Search

There are several ways available for you to perform a lookup. They include:

- Flashlight icon on the toolbar
- **Find** button
- Entering partial characters in **Organization Name** field or **First Name** field

Use this procedure to find a contact or organization.

Prerequisites

The contact or organization must exist in the system.

Navigation

Navigator > eBusiness Center

Steps

1. Verify that **Relationship** is the value selected in the **Party Type** field.
2. Click on **Find** icon (flashlight on toolbar) or **Tools** > **Find** on the menubar.

   The Universal Search form will display.
3. In the **Find** field, select **Business Contac**t or **Consumer**.

   The Business Contact option is used for business-to-business relationships and the Consumer option is used for business-to-consumer.
4. Type the first name or enter a the first few characters of the name.

   Entering only the first few characters enables you to perform a search based on a partial lookup.
5. Click **Search**.

   The results of the lookup will display in the Universal Search form.
6. Select the contact or organization and double-click or click **OK**.

   The information will display in eBusiness Center.

Using eBusiness Center

eBusiness Center in Oracle TeleSales provides a single workspace from which all business and consumer information is entered, updated, and managed. You can view detail from previous interactions, enter new notes, view scripts associated to campaigns, and mature leads and opportunities. It also provides for event and order management and collateral fulfillment.

> **Note:** Changes made in eBusiness Center are real-time. An agent can use eBusiness Center to correct information for a person or contact, an organization, or a contact at an organization as well as relationships. In addition to changing information, new persons, organizations, and relationships can be created from eBusiness Center.

From eBusiness Center, you can perform the following tasks:

- Managing Organization and Contact Information
- Developing and Managing Leads
- Transition Leads to Opportunities
- Managing Opportunities
- Managing Quotes and Orders
- Manage Events
- Manage Collateral Fulfillment

Managing Organization and Contact Information

Managing the demographic and business data for an organization or contact is easily accomplished through the following tabs in eBusiness Center:

- Overview
- Organization
- Contact
- Address
- Relationships
- Accounts

You can perform the following tasks from these tabs:

- Perform a Universal Search and Lookup

- Add Notes
- View All Interactions
- View All Notes
- Enter and Modify Organization Information
- Enter and Modify Contact Information
- Add demographic information
- View and update basic information
- Assign representatives to an account
- Establish Do Not Call or Do Not Mail Restrictions

Creating New Organizations

Use this procedure to create a new organization.

Prerequisites

Search for the organization should have been performed and no matching record for the organization should have been returned in the search.

Navigation

eBusiness Center

Steps

1. Verify that **Relationship** is the value in the **Party Type** field.
2. Enter the information in the top section of eBusiness Center as it pertains to the organization.

Field	Value
Organization Name	Enter the name for the organization.

Field	Value
Relation	From the list of values, select **Contact** as the relationship for the organization. Note: This is a required field. Once you enter the name for the new organization, the system will automatically add the name of the organization to the **View Details For** radio button in the top section of eBusiness Center.
Phone	Enter the phone number for the organization. Note: The **Type** field will default to Inbound Watts. You can change the value if the phone number you enter is for a number other than that assigned to incoming calls.
Email	Enter the email address, if known for the organization. Note: The email address will display in the color green to indicate that you can launch a email session directly from eBusiness Center.
Address	Enter the address for the organization. Note: This is a required field. When you access the Address field, the system will automatically default the country value in the Country field. You can enter extended addresses by selecting the button next to the Address field. You may add up to 3 additional lines of address information. The ellipse button next the Address field is used to perform a lookup of addresses in the database.
City	Enter the city for the organization.
State	Enter the state for the organization.
Province	If the organization is located within a province, enter the name in this field.
Postal Code	Enter the postal code for the organization’s address.
County	Enter the county for the organization.

Field	Value
Country	The country will default in this field as a result of the address field. If the country is other than the default, select the country from the list of values. Note: This is a required field.

3. Ctrl-S, File > **Save** or **Save** icon from the toolbar.
4. Click **Details** to enter additional detail about the organization.

   Additional detail that you can enter includes information about the install base, classification, and sales team.

Enter Fiscal Year and Revenue Information

Use this procedure to enter fiscal year and revenue information for an organization.

Prerequisites

Organization must currently exist. Search for the organization using Universal Search. Identify and select the organization. Verify that the appropriate information displays in the main section of eBusiness Center and the correct relationship displays in the Relation field. Verify that the appropriate View Details For radio button is selected.

Navigation

eBusiness Center > Organization tab

Steps

1. Select the **Organization** tab.
2. Select the Organization Profile section.
3. Enter the detail for fiscal year end and revenue in the following fields.

Field	Value
Analysis Years	Note: This information is used for querying, reporting, and worklist development.

Field	Value
Fiscal Year End	Enter the fiscal year information for the organization. Note: This information is used for querying, reporting, and worklist development.
Current Revenue	Note: Current revenue amounts are determined via Territory Management. This information is used for querying, reporting, and worklist development.
Projected Revenue	Note: Projected revenue amounts are determined via Territory Management. This information is used for querying, reporting, and worklist development.
Rating	You will not be able to enter a value in this field. It is a read-only field. Note: This information is used for querying, reporting, and worklist development.

4. Ctrl-S, File > **Save** or **Save** icon from the toolbar to save the fiscal year and revenue information.

Updating an Address

Use this procedure to update an address for a contact or organization.

Prerequisites

The contact or organization must exist in the system. A previous address must currently exist for the contact or organization. A notification for address update must have been received or requested.

A lookup for the contact or organization must be performed.

Navigation

eBusiness Center

Steps

1. Select the correct party type and press the **Find** button.
2. In Universal Search, enter the parameter for searching.

3. Press Search.
4. Select the correct record
5. In the top section of eBusiness Center, change the address information.
6. Click **Save** or **Save** icon from the toolbar.

Assigning a Sales Team to an Organization

You can assign a sales team to an organization from the Opportunity tab as well as an opportunity in the Opportunity Center. Assigning sales representatives and sales partners to the organization’s sales team is important if your implementation limits access to organization information to sales team members. Alternatively, an agent can add new address in the Address tab and setting the type(s).

You can add a sales team by selecting the Details button and then the Sales Team tab. Or, by waiting for the territory program administrator to run the territory assignment program. You can also manually assign a salesperson or a business partner to your sales team through the Sales Team tab in the Opportunity Center.

Use this procedure to add a sales team to an organization.

Important Note: To enable team members to modify Opportunity information, you must check the Team Leader check box in the Sales Team tab.

Prerequisites

Organization must exist. Verify that the appropriate information displays in the main section of eBusiness Center and the correct relationship displays in the Relation field. Verify that the appropriate View Details For radio button is selected.

You must be the person who created the organization or a sales team leader to make changes in a sales team. You must enter the name and address of the organization before you can assign it a sales team.

Navigation

Navigator > eBusiness Center > Organization Tab

Steps

1. Search for contact using Universal Search.

2. Identify the contact for which you will define restrictions.
3. Select **Details** button.
4. Select the **Sales Team** tab.
5. If you wish to assign a team member you choose:
   a. Select the **Internal** radio button if you wish to add a company employee, or **Partner** for adding sales partners.
   b. Enter the individual's name in the **Sales Rep** field.
   c. If you wish the new team member to have the ability to modify information regarding the organization including the contacts related to it, then check the **Team Leader** check box.
   d. Check the **Keep** check box to make sure the sales territory assignment program does not delete this team member from your team.
   e. Click **Add**.

      The individual's name appears on the list of team members above.
6. If you wish to remove a member of the sales team:
   a. Select the member.
   b. Click **Remove**.
7. If your company assigns sales teams to organizations as well as opportunities, then:
   a. Select the Classification tab.
   b. Enter classification criteria using the fields provided.

      The classification criteria are set up by your implementation team.
   c. Click **Add** after each entry.
8. If you wish to assign a sales team to the organization, then select the Sales Team tab.
9. If you have made any manual changes to that proposed by the territory program, then click **Notify** and enter your reasons in the dialog box. This will inform the territory manager of your changes.
10. Click **Save** on the toolbar to add the sales team information to the database.

Changing Agent Assignment

Use this procedure to change the assignment of an agent for a contact or organization.

Prerequisites

The contact or organization must already exist in the system. Perform a search using Universal Search.

Navigation

eBusiness Center > Organization Tab

Steps

1. Select the **Organization**
2. Click **Detail** button.

   The Organization Detail window will display.
3. Select the **Sales Team** tab.
4. Select an agent by performing a lookup of the list of values on a blank sales agent row.
5. Click **Save** or **Save** icon from the toolbar.

Creating a New Contact

Agents use contact information to develop and maintain relationships with key people in organizations that are targeted for sales. These relationships are crucial throughout the sales cycle, from the development of leads to order generation. Oracle TeleSales provides the mechanism for creating new contacts as well as maintaining information about contacts.

Contacts are linked to organizations. There can be multiple contacts for an organization. Each contact must be associated to an address. Additionally, there may be multiple contacts for an address and conversely, a single contact to multiple addresses.

Prerequisites

You should conduct a search for the contact's name and organization before entering a contact to ensure that you are not creating a duplicate entry.

Navigation

eBusiness Center > Person Tab

1. Select **Person** tab.
2. Click **Details**.

   The Person Details window appears.
3. Enter information about the contact. You must enter at least the contact's name and business phone number. Business phone numbers are considered as the primary phone numbers for the contact and are listed as phone numbers for the organization.
4. Make sure you select **Business** from the Type drop-down list to the right of the business phone number you entered.
5. If you are entering a contact at a new organization, then:
   a. Select the Organization Address tab.
   b. Enter the organization's primary address. This should be the main address such as the organizational headquarters
   c. Make a note to enter the rest of the organization information once you are done adding the contact.
6. Select the Person Address tab.
7. Enter the contact's business address. Make sure that **Business** is selected from the drop-down box.

   Note: If you make no entry here, the contact's business address will default to the primary business address for the organization.

   ---
8. Click **Save** or **Save** icon from the toolbar.
9. If you wish to enter additional addresses for the contact, such as private and mailing addresses, then repeat the following steps for each address:
   a. Select the **Type** of address you wish to add from he drop-down list.
   b. Make your entry.
   c. Click **Save** or **Save** icon from the toolbar.
10. Navigate to the Person tab.

11. Enter additional optional information about the contact including the name pronunciation, job role and manager name.
12. Click **Save** or **Save** icon from the toolbar.
13. Click **Detail**.

    The Contact Detail window appears.
14. On different tabs enter details about the contact including the contact's job and personal history, interests and personality traits.
15. Click **Save** or **Save** icon from the toolbar.

Enter Contact Detail

Enter details for a contact, including such things as product interest, job/military history, education, personal interest, and sales team.

Use this procedure to enter contact details.

Prerequisites

Organization and contact must currently exist. Search for the contact using Universal Search. Identify and select the contact. Verify that the appropriate information displays in the main section of eBusiness Center and the correct relationship displays in the Relation field. Verify that the appropriate View Details For radio button is selected.

Navigation

eBusiness Center > Person Tab

Steps

1. Select the **Person** tab.
2. Select the **Details** button.

   The Person Details window will display. The Person Details form is made up of five tabs; Product Interest, Job/Military History, Education, Personal Interest, and, Sales Team.
3. Select the appropriate tab to enter details for the contact.

   The Product Interest tab allows you to information about products in which the contact may or has expressed an interest.

The Job/Military tab allows you to enter such data as product information, services, etc.

The Sales Team tab allows you to enter and assign a member of the sales team to the contact.

The Details form will display. The Organization Details form is made up of three tabs; Install Base, Classification, and Sales Team.

The Education tab allows you to enter education information for the contact or person.

The Personal Interest tab allows you specify things of personal interest to the contact or person.

4. Click **Save** or **Save** icon from the toolbar to enter the organization details into the database.

Entering Product Interest Information

Steps

1. Select the Install Base tab.
2. The Install Base tab information will display.

Entering Classification Detail

Steps

1. Select the Classification tab.
2. Enter classification criteria using the fields provided.

Note: Classifications are linked to Oracle Sales Online. Classification criteria is set up by your implementation team.

Field	Value
Type	This field represents the install base type. The classification type can be similar to a SIC description.

Field	Value
Primary	This field represents the primary install base. This field is used to represent the primary classification.
Secondary	This field represents the secondary install base. This field is used to represent the secondary classification.
Description	Is used to provide a detail description of the install base type. This field is for entering a description for the classification.
Status	This is indicative of the current status of the install base type.

3. Click **Add** after each entry.
4. Click **Save** or **Save** icon from the toolbar to save your entry.

Entering Sales Team Detail

The Sales Team tab allows for you to enter and view sales team information. The Freeze checkbox will be used by an agent to indicate that they have specific access to an account. Classification can be used to automatically select a sales team via territory management.

Steps

1. Select the Sales Team tab.
2. Enter sales team information using the fields provided.

Field	Value
Display	
Notify Administrator	This button allows the agent to contact the sales member directly.
Name	Enter the name for the member of the sales team.
Phone	This is a read only field and represents the phone number of the sales person.

Field	Value
Sales Group	This field is used to specify the sales group. Default in sales group of employee selected.
Relationship	This field is used to specify the relationships with the sales person.
Email Address	This is a read only field and represents the email address for the sales person.
Salesforce Role	This field is used to specify the role of the salesforce.
Freeze	This checkbox is used to retain an agent or partner's access to an organization, even though the organization is not within the assigned territory.
Team Leader	Use this checkbox represents the team leader. Check with the team leader to determine if the agent needs full update privileges for this organization.

3. Click **Add** after each entry.
4. Click **Save** or **Save** icon from the toolbar to save your entry.

Adding Contact Restrictions

Use this procedure to add restrictions for contacting an organization or contact within a specific organization. For example, notification was received from Mr. Jones at ABC Company that he would be out on medical leave for the next 3 weeks and requests that he not be contacted (email or phone calls) during this period of time.

Prerequisites

The contact or organization must already exist in the system. A search for the contact must have been performed.

Navigation

eBusiness Center > Person Tab

Steps

1. Select the **Person** tab.
2. In the **Display** field, select **Restrictions** from the list of values.
3. In the **Restrictions** field, select **Phone** as the restriction type.
4. Enter the date range for the *phone* restriction in the **Start Date** and **End Date** fields.
5. Select a reason for the phone restriction from the list of values.
6. In the **Restrictions** field, select **Email** as the restriction type.
7. Enter the date range for the *email* restriction in the **Start Date** and **End Date** fields.
8. Select a reason for the email restriction from the list of values.
9. Click **Save** or **Save** icon from the toolbar.

Establishing the Relationship between a Contact and an Organization

Use this procedure to create the relationship between a contact and an organization. For example, an agent receives a call from a contact informing the agent that they no longer are employed with their previous employer and is currently working for another organization.

Prerequisites

The contact and organization must currently exist in the system. A search for the contact must be performed.

Navigation

eBusiness Center > Relationship Tab > eBusiness Center > Person Tab

Steps

1. Select the **Relationship** tab.
2. Select the **Inactive** radio button to change the relationship of the contact with the organization.
3. Click **Save** or **Save** icon from the toolbar.
4. Click **New** button in the top section of eBusiness Center.

5. Select the new organization.
6. Enter the new organization.
7. Enter the relation for the new organization.
8. Enter the address.
9. Enter the phone number.
10. Enter the email address.
11. Click **Save** or **Save** icon from the toolbar.
12. If you need to enter additional information about the contact (e.g., personal information, etc.) select the **Person** tab.
13. Select the **Details** button.
14. Enter the information that is pertinent to the contact.
15. Click **Save** or **Save** icon from the toolbar.

Defining the Relationship between Organizations

Use this procedure to establish and create a relationship between two organizations. For example, a call is received from a contact to advise that her company was recently acquired and now all account payables are being handled by the parent company.

Prerequisites

The organization must already exist in the system. Perform a search for the organization using Universal Search.

Navigation

eBusiness Center > Relationship Tab > Address Tab

Steps

1. Select the **Relationship** tab.
2. In the Object Relationship section of the tab, add the new relationship for the parent organization.

   An agent should also use the Relationship tab to define an organization as a subsidiary of another organization.

3. Select the **Address** tab.
4. Deactivate the current billing address.
5. Select the new address from the list of values.
6. In the **Site Use Type** field, select **Billing** from the list of values.
7. In the top section of eBusiness Center, select **New** button.
8. Enter a new contact for the organization.
9. Enter the data for the new contact.
10. Click **Save** or **Save** icon from the toolbar.

Turning an Opportunity into an Order

Once an opportunity is won, you will need to create an order for the opportunity. Use this procedure to create an order from the opportunity.

Prerequisites

The opportunity must exist in the system. The opportunity must have been won. A lookup for the opportunity must be performed.

Navigation

eBusiness Center > Universal Search > Advanced Tab

Steps

1. In the **Find** field of the Universal Search form, select Opportunity from the list of values.
2. In the **Advanced** tab, enter the parameter to locate the opportunity. For example, close date and win percentage.
3. Click Search.

   If you need to enter updates to such items as purchase lines or sales credit, you will need to drill down into the opportunity to make these updates.
4. Select the opportunity.
5. Update the win percentage, status, close date, and close reason.
6. Click **Save** or **Save** icon from the toolbar.

Creating a Worklist

Use this procedure to create a list of leads to work.

Prerequisites

A lookup for the contact or organization must be performed.

Navigation

Navigator > Lookup

Steps

1. From the Navigator, select **Lookup**.
2. Enter query parameters.
3. Search items, for example, title, name, and purchase items.

   You can maintain the results that display in the search window as a worklist. In doing so, you can work through the items without closing the window by simply clicking the **Apply** button.
4. Perform the tasks as required for each item on the worklist. For example, change the budget amount or status as well its assignment.

Saving Search Criteria for Reuse

Use this procedure to save the search criteria you enter for reuse. The saved search criteria is called a ’folder’.

Prerequisites

None

Steps

1. From the Special menu, select **Lookup**.

   The Search window appears.
2. From the Search For drop-down list, select the type of list you wish to create.
3. With the Basic tab selected, enter search criteria in the fields provided.

4. If you wish to restrict the search using advanced criteria, such as searching only key accounts or limiting searches to a product interest or a specific sales team, then:
   a. Select the **Advanced** tab.
   b. Select any number of search criteria in the item column.
   c. Select a condition for each in the Value column from the List of Values (LOV).
5. Click **Search**.
6. If you are satisfied with the search results, then click **Save Folder**.

   The My Folders window appears.
7. Enter a name for the folder that will help you identify it later.
8. Click **Save** or **Save** icon from the toolbar.

Fulfilling Collateral Requests

Use this procedure to fulfill collateral requests for a contact or organization.

Prerequisites

The contact or organization must exist in the system. A request for collateral must have been made by the caller.

A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Overview Tab > Collateral Tab

Steps

1. Select the **Overview** tab.
2. Select **Campaign**.
3. Search the campaigns to identify the campaign in which the caller is interested.
4. Click on the **Collateral** tab.
5. Click in **Collateral Name** field.
6. Click the Collateral Name list of values.

7. Select the collateral item from the list of values.
8. Click in the **Contact** field.

   The caller information will display. You should not need to modify this information unless you need to send collateral to another or different contact.
9. Select shipping method.
10. Select 'mail to' address.
11. Click **Add to Cart**.
12. Click **Review Request**.
13. Select shipping method and mail to for confirmation letter.
14. Click **Send Request**.

Sending Mass Collateral

Use this procedure to send mass collateral to target leads.

Prerequisites

The contact or organization must exist in the system. Leads must already be created.

A lookup must be performed for the business contact based on specific search criteria. The lookup must be saved.

Navigation

eBusiness Center > Collateral Tab

Steps

1. Select the **Collateral** tab.
2. In the Collateral Description section, click on the **Name** field.
3. Click on the list of values in the **Name** field.
4. Search the collateral to be sent.
5. Click **OK**.
6. Click Mass Collateral.
7. Enter the lookup name in the **Find** field.
8. Select **OK**.

9. Click **Add to Cart** button.
10. Click **Review Request** button and review request.
11. Click **Send Request** button.

Entering a New Lead and Sending Collateral

Use this procedure to enter a new lead and send collateral to the contact.

Prerequisites

The contact must already exist in the system. Perform a search to identify the contact for which you will enter a new lead and send collateral using Universal Search.

Navigation

eBusiness Center > Universal Search > Lead Center > Overview Tab > Collateral Tab

Steps

1. Find and organization or person.
2. Create the new lead in Lead Center.
3. Select the **Overview** tab
4. In the **Campaign** field, select the campaign from the list of values.
5. Select the **Collateral** tab.
6. Click in **Collateral Name** field.
7. Click the Collateral Name list of values.
8. Select the collateral item from the list of values.
9. Click in the **Contact** field.

   The caller information will display. You should not need to modify this information unless you need to send collateral to another or different contact.
10. Select shipping method.
11. Select 'mail to' address.
12. Click **Add to Cart** button.
13. Click **Review Request** button.

14. Select shipping method and mail to for confirmation letter.
15. Click **Send Request**.

Searching Opportunities

Use this procedure to search for opportunities such as those on a short list or are linked to a particular channel.

Prerequisites

Opportunities must exist in the system.

Navigation

eBusiness Center > Universal Search

Steps

1. In the **Find** field of the Universal Search form, select **Opportunity** from the list of values.
2. In the **Advanced** tab, enter the parameters and filter criteria to be used to search and identify these opportunities.
3. Click **Search**.

   The results of the search will display for you to view and select the appropriate opportunities.

Creating an Opportunity

Use this procedure to create an opportunity for an organization. For example, an inquiry is made by an organization that recently acquired another company. The newly acquired company does not have the necessary infrastructure in place to support a call center environment. They want to speak someone in sales to identify and assess their needs.

Prerequisites

A search for the organization must be performed.

Navigation

eBusiness Center > Window option > Navigator > eBusiness Center (2nd session) > eBusiness Center > Relationship Tab > Opportunity Tab

Steps

1. From eBusiness Center, select the **Window** option from the menubar.
2. From the drop down list select **Navigator**.
3. Double-click on eBusiness Center to launch another session.
4. In the new eBusiness Center session, verify that party type is **Organization**.
5. Enter the new organization information.
6. Click **Save** or **Save** icon from the toolbar.
7. Close the additional eBusiness Center session.
8. In the original eBusiness Center session, click on the **Relationship** tab.
9. In the Subject Relationship section, select object type of organization from the list of values.
10. Select object name of the newly created organization.
11. Select the **Opportunity** tab.
12. Click **New Opportunity** button.
13. Enter information about the opportunity.

    You can enter a note for the opportunity in the **New Note** text box.
14. Click **Save** or **Save** icon from the toolbar.
15. If you need to enter purchase information for the opportunity, click **Opportunity Center** button.

    The Opportunity Center window will display.
16. Select the **Purchase Interest** tab.

    Enter purchase information for the opportunity.
17. Click **Save** or **Save** icon from the toolbar.

Viewing Organization Hierarchy

An organization can have many addresses and more than one contact per address. Additionally, an individual contact may have be associated to several addresses. The hierarchy is created through the definition of organizations and contacts and the relationship between them. To view this hierarchy, you will use the View Details For radio buttons and the Relationships tab in eBusiness Center. The View Details For radio buttons provide a means for segregating data, thereby providing a better understanding of the data. There are two types of relationships; object and subject. The contact within an organization is considered a 'subject relationship'. For example, Storage Solutions is an organization and is the object relationship. Better Networks is a subsidiary of Storage Solutions. Better Networks represents the subject relationship. Another example, Sam is a contact for Storage Solutions. Sam also is a subject relationship of Storage Solutions.

Use this procedure to see the hierarchical structure of an organization.

Prerequisites

An organization must exist and addresses defined for the organization.

Navigation

eBusiness Center > View Details For radio button

Steps

1. Verify that **Relationship** is the value in the Party Type field.
2. Search for the organization using Universal Search.
3. Identify and select the organization to view.
4. Verify that the View Details For radio button for the organization is selected in eBusiness Center.
5. Select the Relationships tab.

   The Relationships tabs consists of two sections; Object Relationship and Subject Relationship.

   The Object Relationship section contains the following fields.

   - Subject Type
   - Subject Name
   - Type

- Object Name
- Start Date
- End Date
- Status

The Subject Relationship section contains the following fields.

- Object Type
- Subject Name
- Type
- Object Name
- Start Date
- End Date
- Status

Viewing Notes

Use this procedure to view notes entered for a contact or organization.

Prerequisites

Notes for the contact or organization must already exist in the system. Perform a search for the contact or organization using Universal Search.

Navigation

eBusiness Center > Overview Tab

Steps

1. Select the **Overview** tab.
2. In the **View** field, select **Notes** from the list of values.

   Oracle TeleSales notes that exist for the contact or organization will display in the table of the Interaction History section of the **Overview** tab.
3. To view all notes, select **All Notes** button.

As previously noted, the results will display in the Interaction History section to include all notes entered, across CRM applications, that are specific to the contact or organization.

You can also filter the view by querying on specific criteria, e.g., agent name.

4. If you want to view all notes by agent name, select **Find** button in the top section of eBusiness Center.

Adding a New Note

Use this procedure to add a new note.

Prerequisites

The contact or organization for whom you will add a note must already exist in the system. Perform a search for the contact or organization using Universal Search.

Navigation

eBusiness Center > Overview Tab

Steps

1. Identity the contact or organization for which you add a note.
2. Select the **Overview** tab.
3. In the **New Notes** section, enter a free text note.
4. Click **Save** or **Save** icon from the toolbar button.

   The note displays in the Bali table.

Viewing All Interactions

Sometimes it is necessary during the course of working with a contact or organization to view interactions that have occurred, regardless of the CRM application in which the interaction may have occurred. Use this procedure to view all interactions recorded for a contact or organization.

Prerequisites

The contact or organization must exist in the system. Interactions must have been recorded and tracked.

A lookup for the contact or organization must be performed based on specific search criteria.

Navigation

eBusiness Center > Overview Tab

Steps

1. Select the **Overview** tab.
2. In the Interaction History section, select **Interactions** from the **View** field.

   The Oracle TeleSales interactions that exist for the contact or organization will display in the table of the Interaction History section.
3. To see all interactions, choose the **All Interactions** button.

   As previously noted, the results will display in the table of the Interaction History section to include interactions as recorded across CRM applications that are tied specifically to the contact or organization.

Reviewing Saved Searches

Use this procedure to query against previously saved searches.

Prerequisites

Previous search must have been performed the results saved.

Navigation

Navigator > Universal Search/Workbench

Steps

1. Select the query.
2. Run the query.
3. Repeat for all saved queries in which you want to review the list of contacts or organizations.

Reviewing Account Information

Use this procedure to review account information. For example, credit or billing preferences need to be reviewed by a contact who is covering for a co-worker.

Prerequisites

Contact must exist in the system. You must perform a search for the contact.

Navigation

eBusiness Center > Accounts Tab

Steps

1. Search for the contact.
2. Identify and select contact.
3. Select the **Accounts** tab.
4. Account details will display for you to review the information.

Adding Additional Contacts and Addresses

Use this procedure to add additional contacts for an organization.

Prerequisites

The contact must already exist in the system. Perform a search for the contact using Universal Search.

Navigation

eBusiness Center > Person Tab > Address Tab > Relationship Tab

Steps

1. Select the **Person** tab.
2. Choose **View Details For** radio button for the contact.
3. Add the new contact name.
4. Choose the **Address** tab.
5. Add the new address for the contact.
6. Choose the **Relationship** tab.

7. Establish the relationship between the contacts
8. Click **Save** or **Save** icon from the toolbar.

Accessing Lead Center

The Lead Center is used to manage leads to include:

- lead assignment
- status
- ranking
- qualifying
- channel assignment
- purchase interest
- contact management
- create opportunity from leads
- assign tasks
- decline leads
- enter budget information
- adding product interest
- adding detail contact information
- associate opportunities
- create and assign tasks
- enter notes

To access the Lead Center, perform the following.

1. Select the **Leads** tab.
2. Click **Lead Center** button.

   The Lead Center window will display.

Creating a Lead

Use this procedure to create a lead.

Prerequisites

A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Leads Tab > Lead Center

Steps

1. Search for the organization.
2. Click on the View Details For radio button for the organization.
3. Select the **Leads Tab** tab.

   A list of existing leads will display in the Bali table.
4. Click **New Lead** button.

   The Lead Center will display.
5. Enter the information for the lead.
6. Click **Save** or **Save** icon from the toolbar.

Updating a Lead

Use this procedure to modify or update an existing lead.

Prerequisites

The lead must currently exist in the system. A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Leads Tab > Lead Center

Steps

1. Search for the organization.
2. Click on the View Details For radio button for the organization.
3. Select the **Leads Tab** tab.

   A list of existing leads will display in the Bali table.
4. Select the lead to update.

The details associated to the lead will display in the fields on the right side of the Leads tab.

5. Enter the changes or updates for the lead.
6. Click **Save** or **Save** icon from the toolbar.

Creating an Opportunity from a Lead and Assigning a Sales Team

After reviewing a lead and changing the status of the lead to qualified, use this procedure to turn the lead into an opportunity.

Prerequisites

The lead must currently exist in the system. The status of the lead must be changed to qualified.

A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Leads Tab

Steps

1. Find the organization.
2. Verify that the View Details For radio button is selected for the organization.
3. Select the **Leads** tab.
4. Update the lead with the new information.
5. Enter any notes.
6. Click **Save** or **Save** icon from the toolbar.
7. Click **Lead Center** button.
8. Click **Create Opportunity** button.

   The agent can access the newly created opportunity from the **Opportunity** tab within the Lead Center.
9. Select **Opportunity Center** button.
10. Select **Sales Team** tab.
11. From the partner section of the **Sales Team** tab, assign a partner to the team.

The bottom portion of the **Sales Team** tab is the partner section.

12. Click **Save** or **Save** icon from the toolbar.

Converting a Lead into an Opportunity

Use this procedure to convert a lead to an opportunity.

Prerequisites

The lead must currently exist. A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Leads Tab > Lead Center

Steps

1. Select the **Leads Tab** tab.

   All available open leads for the contact or organization will display.

2. Double-click on the lead for which you are going to change to an opportunity.

   The Lead Center will display.

3. Select the **Purchase Interest** tab.
4. Select the list of values in the **Interest Type** field to update the product interest for the organization or contact.
5. Update all fields as required for the opportunity to be created. For example, secondary interest or campaign code and budget amount.
6. Click **Create Opportunity** button.
7. Click **Save** or **Save** icon from the toolbar.

Using Opportunity Center

The Opportunity Center is used to manage:

- opportunity information
- status of opportunity
- purchase interest

- mass updates
- quote creation
- win/loss probability
- notes
- sales stage
- channels

To access the Opportunity Center, perform the following.

1. Select the **Opportunity** tab.
2. Click **Opportunity Center** button.

   The Opportunity Center window will display.

Forwarding Opportunities

When it is necessary to pass an opportunity on to a channel partner, you can do so through the Opportunity Center. Use this procedure to forward an opportunity to another channel.

Prerequisites

The opportunity must already exist in the system. Perform a search for the opportunity in Universal Search using specific search criteria.

Navigation

eBusiness Center > Opportunity Tab

Steps

1. Select the **Opportunity** tab.

   The opportunities that currently exist will display.
2. Double-click on the opportunity to be passed along.

   The Opportunity Center will display.
3. In the **Channel** field, select the proper indirect channel.
4. Click on the **Sales Team** tab.
5. In the partner section, perform a lookup of the list of values.

6. Select the partner to which the opportunity will be passed.
7. Click **Save** or **Save** icon from the toolbar.

Adding a Task to an Opportunity

Use this procedure to add a new task to an existing opportunity.

Prerequisites

The opportunity must exist. A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Opportunity Tab > Opportunity Center

Steps

1. Select the **Opportunity** tab.

   All existing opportunities will display.
2. Double-click on the opportunity to which you will add the task.

   The Opportunity Center will display.
3. Select the **Task** tab.
4. Schedule the task.
5. Click **Save** or **Save** icon from the toolbar.

Handling Events and Event Registration

In Oracle TeleSales, the management and coordination of event activities is accomplished from the Events tab in eBusiness Center.

From Events tab, you can perform the following:

- Register Event Attendees
- Confirm Registrations
- Cancel Registrations
- Enter Payment Information
- View Event History

- Enter Contacts
- Search Events
- View Related Items
- Mass Event Registration

Registering Event Attendees

Use this procedure to register a contact or organization for an event.

Prerequisites

The contact or organization must exist in the system. A request for enrollment or attendance must have been made by the caller.

A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Events Tab

Steps

1. Select the **Events** tab.
2. Click on **Search Event** button.
3. Enter in search criteria.
4. Select the appropriate event.
5. Click **OK**.
6. Click **Add to Cart** button.
7. Click in **Enrollee** field and select the Enrollee list of values.
8. Select the name of the contact to attend the event.
9. Click **Enroll**.

   If the event requires payment, first enter the credit card information.
10. Select confirmation shipping method, and mail to address.
11. Click **Enroll**.

Confirming a Registration

Use this procedure to confirm the registration for an event attendee.

Prerequisites

The contact or organization must exist in the system. The attendee must already have been registered for an event.

A lookup for the contact or organization must be performed.

Navigation

eBusiness Center > Events Tab

Steps

1. Select the **Events** tab.
2. Click **Search Event** button.
3. Enter the search criteria.
4. Click **Search**.
5. Select the appropriate event.
6. Click **OK**.
7. Click **Item Details** button.
8. View Event Roster information.
9. Click **OK**.

Tasks

The Task tab allows you to assign tasks to leads, opportunities, a person or an organization. Each task is handled by the Task Manager and can be viewed using the Task tab in eBusiness Center, Lead Center, and Opportunity Center.

From the Task tab an agent can perform the following:

- View task details
- View task source
- View task assignment
- View parent tasks (if associated)

- View all tasks for an organization or person
- Mark the task as private or as publishable
- Enter a new task
- Update or modify task details