

Oracle[®] TeleSales

Implementation Guide

Release 11*i*

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ORACLE[®]

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Oracle TeleSales Implementation Guide, Release 11*i*

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Preface

This Implementation Guide provides information and instructions to help you implement Oracle TeleSales, Release 11*i*.

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

Intended Audience

This guide is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle CRM and ERP applications. You must have an understanding of Oracle CRM and ERP and applications before proceeding.

How Implementation Topics are Organized

The implementation topics in this guide are grouped in a multi-level hierarchy giving different levels of detail on the steps of your implementation.

The "[Implementing Oracle TeleSales](#)" topic on page -4 lists the major steps in your implementation. Each step is numbered and linked to procedures that give you more detail. Each step must be performed for the application to run properly.

The topics are optimized for online delivery. This means that this guide is best read in the PDF format. Printing this document makes it impossible for you to follow the hyperlinks between topics.

Related Documentation and Resources

The following documents provide additional information on installing and implementing Oracle CRM products.

Installing Oracle Applications, Release 11i

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i.

Oracle Applications Flexfield Guide

This guide contains information about using Oracle Flexfield features. It also offers flexfield implementation suggestions.

Oracle Applications Product Update Notes, Release 11i

This document contains information about new product features and functions for various Oracle applications.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Applications User's Guide

This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11i.

Additional Product-Related Documentation

Implementing CRM Applications

This document provides instructions for completing installation of Oracle Customer Relationship Management (CRM) products.

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

This guide describes set up and configuration tasks for all the foundation components.

Oracle CRM Foundation Technical Reference Manual

This manual contains table and view descriptions for all the Oracle CRM foundation components.

Oracle Inventory User's Guide

This guide contains information about product features and functions for Oracle Inventory.

Oracle Marketing Concepts and Procedures

This document is a printed compilation of the Oracle Marketing online help system, including implementation information.

Oracle Marketing Encyclopedia Concepts and Procedures

This document is a printed compilation of the Oracle Marketing Encyclopedia online help system.

Oracle Order Capture Concepts and Procedures

This document is a printed compilation of the Oracle Order Capture online help system.

Oracle Sales Compensation Implementation Guide

This guide describes set up and configuration tasks required to implement Oracle Sales Compensation.

Oracle TeleSales Technical Reference Manual

This manual contains table and view descriptions for Oracle TeleSales.

Implementing Oracle TeleSales

Oracle TeleSales is an Oracle Forms-based application for use by call center agents, sales representatives, and sales managers.

Functionality

Oracle TeleSales functionality includes the following:

Customer and Contact Management

Oracle TeleSales provides representatives with a complete customer overview at each stage of the sales process, in both Business to Business and Business to Customer environments. Before contacting a customer, a sales representative can review customer information including: products installed, outstanding service requests, payment history, key contacts, open opportunities, and specific sales team members assigned to the customer account. Comprehensive customer information allows sales representatives to better manage their customer accounts and to plan each customer interaction more efficiently.

Opportunity Management

Account managers, sales managers, and territory managers can use Oracle TeleSales to analyze their pipelines. Oracle TeleSales can be used to obtain real time reports for any prospect, sales representative, or sales group by sales channel, sales status, and sales stage.

Multi-Currency Support

Oracle TeleSales provides support for international sales teams with transactions involving multiple currencies. Salespeople can create and view their opportunities,

forecasts, and reports in both the transaction currency as well as the user base currency.

Custom Fields

Oracle TeleSales provides additional implementation flexibility by allowing organizations to define custom fields on their screens and track business-critical data.

New in this Release

The following new features have been added to Oracle TeleSales in this release.

Automatic Lead Assignment and Routing

Oracle TeleSales automatically assigns new leads to agents through the Territory Management module and then reroutes them if the agents assigned to those leads have not taken action within a specified number of days. If a lead is not closed after a set period the lead can be automatically be rerouted to an agent designated to handle abandoned leads.

Automatic Lead Qualification

Oracle TeleSales automatically qualifies leads based on criteria set by managers. For example, an organization may consider a lead qualified if it has at least a customer name, a purchase time frame, and a budget.

Automatic Lead Ranking

Oracle TeleSales automatically ranks leads based on a score card set up by managers. The score card assigns a set of points for a specific agent entry. For example, the score card assigns more points to leads with high purchase amounts than those with small amounts, and more points to leads with short time frames than those with long time frames. The applications ranks leads based on the total number of points. For example, a lead with 100 to 199 points may be ranked as a medium lead. A lead with 200 to 500 points may be ranked as a hot lead.

Customer Relationship Manager

This release of Oracle TeleSales takes advantage of the new customer model which is shared by all Oracle applications. The user has the ability to create and manage complex relationships (such as partners, subsidiaries, competitors, clubs, etc.) among multiple parties and maintain these relationships as they change.

Globalization

Users can now select language and date formats, as well as preferred base currency.

Tasks and Interactions

Users can create and assign tasks to themselves or other team members. Tasks are organized in a work queue and can be sorted by priority, due date, status, etc. Oracle TeleSales users have visibility into all customer touch points through integration with the Oracle E-Business suite of applications and can view interactions performed by other systems and/or individuals.

Collateral Fulfillment

Through integration with Oracle 1-to-1 Fulfillment, users can send collateral to their contacts and/or prospects.

Enhanced Territory Management

Oracle TeleSales takes advantage of the enhanced Territory Management module. Users can define flexible territories where qualifiers can be defined using any attribute related to the customers and/or opportunities.

Oracle Business Intelligence System Integration

Oracle TeleSales users can have access to all the operational and intelligence reports provided in the Oracle Business Intelligence System through the Single-Sign-On technology provided by the Oracle E-Business suite.

Application Architecture

The application architecture for Oracle TeleSales is as follows:

Technology Stack

Oracle TeleSales is built on the following technology stack:

- Dataserver (EE + InterMedia all options + Spatial), version 8.1.6.1
- WorkFlow, version 2.5
- InterMedia, version 8.1.6
- Client side RSFs, version 8.0.6
- Forms, version 8.0.6

- Reports for use with Concurrent Mgr., version 6.0.8.8
- WebDB, version 2.2.1.1
- EWT, version 3.3.6
- Perspective for Java, version 1.1 build 325
- JInitiator, version 1.1.7.27
- MS Internet Explorer, version 5.0
- Netscape Navigator, version 4.5

Dependencies

Oracle TeleSales requires the following related products and components to be installed and implemented:

- Oracle CRM Foundation Components including Interaction History, Resource Manager, Territory Manager, Task Manager, Notes, 1-to-1 Fulfillment
- Oracle Universal Work Queue
- Oracle Core Sales
- Oracle Marketing Online
- Oracle Order Capture

Implementing Oracle TeleSales

The steps below outline the necessary steps required to successfully implement Oracle TeleSales. Follow the hyperlink in each step to go to the details of each step given later in the document.

Prerequisites

Successful installation of CRM Family Pack 1.

Completion of installation and implementation steps as outlined in the following documents:

- *Oracle System Administrator's Guide*
- *Implementing CRM Applications Release 11i*

User creation and assignment of Oracle Sales Administration Responsibility and System Administrator responsibility. All of the Oracle TeleSales implementation tasks can be completed using these responsibilities.

Steps

1. [Implement Oracle ERP applications.](#) (Required)
2. [Create locations and organizations.](#)(Required)
3. [Create employees.](#) (Required)
4. [Set up users.](#) (Required)
5. [Set up CRM Foundation Notes module.](#)(Required)
6. [Set up the tracking of interactions .](#) (Required)
7. [Set up CRM Foundation Tasks module.](#) (Required)
8. [Set up CRM Foundation Calendar module.](#) (Required)
9. **[Set up CRM Foundation Fulfillment module.](#)** (Required)
10. [Set up CRM Foundation Territory Management module.](#) (Required)
11. [Set up CRM Foundation Order Capture.](#) (Required)
12. [Set up CRM Foundation Universal Work Queue.](#) (Required)
13. [Set up marketing campaigns in Oracle Marketing Online.](#) (Required)
14. [Set up events in Oracle Marketing Online.](#) (Required)
15. [Set up collateral in Oracle Marketing Online.](#)(Required)
16. [Set up scripting.](#) (Required)
17. [Enable Advanced Inbound/Outbound telephony.](#) (Required)
18. [Set up the Profile section of Oracle TeleSales eBusiness Center.](#) (Required)
19. [Set up lead management.](#) (Required)
20. [Set up opportunity management.](#) (Required)
21. [Set up the Quick Menu](#) (Required)
22. [Set up campaign assignment and wrap-up administration.](#) (Required)
23. [Set up Oracle TeleSales system profiles.](#) (Required)
24. [Set up Oracle TeleSales lookups](#) (Required)

25. [Set up flexfields.](#) (Required)
26. [Set up directory assistance through web services.](#) (Required)
27. [Set up dialed directory assistance numbers.](#) (Required)
28. [Run concurrent programs.](#) (Required)

Step 1: Implement Oracle ERP Applications

Set up Oracle Inventory and Oracle Receivables according to the steps outlined in *Oracle Inventory User's Guide* and *Oracle Receivables User Guide Release 11i*.

Step 2: Create Locations and Organizations

This step is part of multi-org setup. Employees are assigned to organizations and users are tied to responsibilities that are specific to their organization.

Reference: *Implementing Oracle HRMS*.

Step 3: Create Employees

This step must be performed by a user with HRMS Manager responsibility. The user must be defined as an employee/user in Oracle HRMS.

Reference: *Managing People Using Oracle HRMS Release 11i*, Chapter 1 - Employee Management, Special Information Types, Entering and Maintaining a New Person.

Step 4: Set Up Users

Follow the general guidelines as outlined in *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*. Tasks and tips specific to implementation for Oracle TeleSales are provided below.

4a) Define Resource Groups

- This step must be performed by a user with CRM Resource Manager responsibility.
- The user must be defined as a resource.
- Group usages must be "Sales & Telesales" or the user will not be able to log in.
- Add members including Reps and Managers.

- If a managers have their own opportunities, then they should be part of their own groups.
- Use the Relations tab to relate Parent Groups
- It is easiest to build the hierarchy from the bottom up.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager, Defining Resource Groups.*

4b) Import Resources

Steps

1. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Import Resources** under the Oracle Sales Administrator responsibility.
The Selection Criterion window appears.
2. Select Employee from the **Resource Category** drop-down list.
3. If you are importing a single employee, then use the List of Values in the Name field. For groups of employees, search by job title, competency or other criteria.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager*

4c) Create and Modify Resources

This step must be performed by a user with CRM Resource Manager responsibility. You must define the users as resources first.

Assign a Role with a role type of Sales or Field Sales.

Role type must be Sales or user will not be able to log into Oracle TeleSales. Sales managers need to have both Sales and Field Sales roles. Seeded roles include Sales Representative and Sales Manager. You can create additional sales roles, but Oracle recommends you use the seeded roles as these are tied to Oracle TeleSales functionality.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager, Defining Resource Groups.*

4d) Assign Resources to Groups

Use the Group tab in Resource Details to assign the resource to a group.

Note that a resource can be in multiple groups. This is supported in Oracle TeleSales's Opportunity module.

Managers should be assigned to their own group if they manage their own opportunities.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager*

4e) Set Up Oracle TeleSales Users

Steps

1. Log in as System Administrator.
2. Navigate to **Security > User > Define**.
The Users window appears.
3. Create a new user by entering new user name and password.
4. Use the Person List of Values (LOV) to select the employee.

Note: Write down the name of the employee you just assigned.

5. Assign the appropriate TeleSales responsibility to the user. The available options are:
 - TeleSales Agent
 - TeleSales Marketing Agent
 - TeleSales Manager
 - TeleSales Administrator
6. Click **Save** in the toolbar.
7. Switch to the CRM Resource Manager responsibility.
8. Navigate to **Maintain Resources > Import Resources**.
The Selection Criterion window appears.
9. Go to the Name field and use the LOV to select the name of the employee you just assigned.

4f) Set Up Access

Steps

1. Navigate to **Profile > System**
2. Set the following profile options:
 - OS: Customer Access Privilege
 - OS: Opportunity Access Privilege
 - OS: Lead Access Privilege
 - list the ones with OS: %access%
3. Once access is set up, run the concurrent program Setup Checking for Sales Applications under the Sales Administrator responsibility.

Step 5: Set Up CRM Foundation Notes

Oracle Notes is a CRM Foundation component which comes with a set of predefined note types. You may choose whether or not you wish to use the predefined note types and whether you wish to create customized note types of your own.

Refer to the Implementing Notes section of the *Oracle CRM Foundation Implementation Guide* for additional information about setting up Oracle Notes.

Use the following procedure to set up note types.

Steps

1. Navigate to **Notes Setup > Note Type Setup** under the CRM Administrator responsibility.
The Application Object Library: Note Types Lookups window appears.
2. Define the code, meaning, and description as desired. You are only required to define a tag for a new, customized note type.
3. **Save** the record when you are finished.

Deleting an Existing Note Type

Assign an end date to an existing note type to delete it.

Mapping Note Types to a Source

When you map a note type to a source object, you limit the visible note types for that source to the defined subset of note types.

Step 6: Set Up Interaction Tracking for Oracle TeleSales

Oracle Telesales can be configured to track interactions and activities for events, opportunities, leads, customers, collateral, and notes. Use this procedure to enable tracking of activities and interactions.

Steps

1. Set up Interaction History according to the Implementing Interaction History section of the *Oracle CRM Foundation Implementation Guide*.
2. Under the TeleSales Administrator responsibility, navigate to Campaign Outcome Assignment.

The Campaign Outcome Assignment window appears.

3. Setup a default campaign with at least one outcome assigned to it.
4. Set OTS: Telesales Interaction Enabled system profile to *Yes*.

Note: Setting OTS: TeleSales Interaction Enabled to *No*, disables all activity tracking overriding the setting of system profile options in steps 5 through 11.

5. If you wish to track activities for customers, then set OTS: Generate Customer Activity to *Yes*.
6. If you wish to track activities for leads, then set OTS: Generate Lead Activity to *Yes*.
7. If you wish to track activities for opportunities, then set OTS: Generate Opportunity Activity to *Yes*.
8. If you wish to track activities for collateral, then set OTS: Generate Collateral Activity to *Yes*.
9. If you wish to track activities for events, then set OTS: Generate Event Activity to *Yes*.

10. If you wish to track activities for notes, then set OTS: Note Interaction Activity to *Yes*.
11. Set the profile OTS: Max Interactions Displayed to determine the number of interactions displayed in the eBusiness Center.

Step 7: Set Up CRM Foundation Tasks

Oracle TeleSales functionality is limited to the following:

1. Defining Task Status (Status Transition and Rules is not supported)
2. Defining Task Priorities
3. Defining Task Types (Resource Requirements and Workflow are not supported)
4. Defining Task Templates (Dependencies and recurrences are not supported).

Step 8: Set Up CRM Foundation Calendar

Refer to the Implementing Calendar section of the *Oracle CRM Foundation Implementation Guide* for information about setting up calendar functionality.

Step 9: Set Up CRM Foundation Fulfillment

Refer to the 1-to-1 Fulfillment section of the *Oracle CRM Foundation Implementation Guide* for information about setting up Fulfillment.

Step 10: Set Up CRM Foundation Territory Management

Refer to the Implementing Territory Manager section of the *Oracle CRM Foundation Implementation Guide* for information about setting up territory management.

Step 11: Set Up CRM Foundation Order Capture

Implement Oracle Order Capture according to the steps outlined in *Oracle Order Capture Implementation Guide*.

Step 12: Set Up Oracle Universal Work Queue

Refer to the *Oracle Universal Work Queue Implementation Guide* for information about setting up the Universal Work Queue.

Step 13: Set Up Marketing Campaigns in Oracle Marketing Online

Refer to *Oracle Marketing Online Implementation Guide* and *Oracle Marketing Online Concepts and Procedures* for information on how to set up marketing campaigns. Please note that only active, public, and non-template campaigns are displayed in Oracle TeleSales.

Step 14: Set Up Events in Oracle Marketing Online

Use this procedure to set up events.

Prerequisites

- You must complete Step 13 before setting up events.
- You must be set up as a user for Oracle Marketing Online.
- You must have the URL for Oracle Marketing Online.

Steps

1. Set up events according to *Oracle Marketing Online Implementation Guide*.
2. Log on into Oracle applications again as a System Administrator.
3. Navigate to **Profile > System**.
4. Set the following two profile options to **Yes**:
 - AMS: Should Call To Inventory Modules To Be Made
 - AMS: Should Call To Pricing Modules To Be Made
5. Log into Oracle Marketing Online using your web browser. You will need a URL and your Oracle Marketing log-in name and password.
6. Create your events according to the procedure described in *Oracle Marketing Online Concepts and Procedures*. For each event, you must:
 - a. Create a roll-up event.
 - b. Create an execution event for that rollup event with these three conditions:
 - * The maximum size of the event must be greater than 0.
 - * You must enter an inventory item number for the event.
 - * You must set up a price for the event.

- c. If you wish TeleSales agents to view notes about the event, then enter them according to the procedure outlined in the Publishing Event Notes on Your Web Site topic of *Oracle Marketing Online Concepts and Procedures*.

Step 15: Set Up Collateral in Oracle Marketing Online

You must complete Step 13 before starting this step.

Follow the procedure outlined in Creating a Deliverable in *Oracle Marketing Online Concepts and Procedures* to create collateral. Note that collateral is called a deliverable in Oracle Marketing Online.

Step 16: Set Up Scripting

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures* to set up scripts for your agents. Set up the following system profile options under the TeleSales Administrator responsibility. (See system profile descriptions at the end of this document for more information.)

OTS: Scripting Database SID

OTS: Scripting Embedded

OTS: Scripting Installation

OTS: Scripting JNDI

OTS: Scripting Port

OTS: Scripting Server Host
Name

OTS: Scripting Three Tier

OTS: Scripting Uses AOL User

Step 17: Enable Call Center/ Advanced Outbound

Follow the instructions in the implementation section of *Oracle Predictive Concepts and Procedures* and *Oracle Telephony Manager Implementation Guide*.

If advanced inbound is installed, then set OTS: Advanced Inbound Installation to *Yes*.

If advanced outbound is installed, then set OTS: Advanced Outbound Installation to *Yes*.

Step 18: Set Up Profile for Oracle TeleSales eBusiness Center

Set up the Profile region of the eBusiness Center header according to the procedures described in *Oracle Service Concepts and Procedures* and *Oracle Service Implementation Guide*.

To display the Profile region of the eBusiness Center, set OTS: Display Customer Profile to *Yes*.

Step 19: Set Up Lead Management

Setting up leads requires the following steps.

19a) Setting Up Lead Status

Oracle TeleSales comes with a set of predefined lead statuses. These are:

- New
- Qualified
- Unqualified
- Accepted
- Declined
- Sales Opportunity
- Dead Lead
- Loss

Use the following procedure to define alternate statuses. The procedure here is the same as that used to define opportunity status.

Steps

1. Under the TeleSales Administrator responsibility, navigate to **Sales Administration > Opportunities > Status**

The Define Status Codes window appears.

2. Enter the status code meaning and description for the status. The meaning is displayed on the user interface.
3. Select whether you want the status to apply to opportunities, sales leads, or both by selecting the appropriate checkbox in the Used For region.

4. The Open checkbox determines whether the lead is open or closed. Selecting the check box leaves the lead open and modifiable when set to this status.
5. Select the Enabled checkbox to activate the status.
6. The Win Loss Indicator region indicates whether the deal has been won, lost, or closed. If the open flag is unchecked, then the choices are won, lost, or neither.
7. If you are setting up the status for both leads and opportunities, then select the Used in Forecast checkbox to include the opportunity with this status in the forecast.
8. Use the Usage Indicator drop-down list to select the application families you wish this status to be used in. Selecting All enables the status for all applications.
9. Save your work.

19b): Set Up the Lead Score Card

Use this procedure to modify an existing lead score card or create a new one. While you can create multiple score cards, you can have only one score card enabled at one time. You must enable a score card for the whole site.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Lead Scorecard.
2. If you wish to modify an existing lead score card, then use the Description List of Values LOV to select a score card.
3. If you wish to create a new score card, then:
 - a. Enter a new Description.
 - b. Click **Save** in the toolbar.
4. If you wish to add a rule:
 - a. Click **Add Rule**.

The Create/Edit Rule window appears.
 - b. Using the Rule LOV, enter the field you wish to use for the calculation.

The available fields are:

 - * Organization: name of an organization.
 - * Campaign code

- * Contact role
 - * Sales channel
 - * Budget amount
 - * Time frame
 - * Budget Status
- c. If the field you entered in the previous step requires a range of values, then enter the range in the Low Value and High Value fields.
 - d. If the field requires only one value, then enter that value in the High Value field only.
 - e. In the Score field, enter the numerical score for this rule.
 - f. Click **Save**.
5. If you wish to edit a rule, then select the rule and click **Edit**.

19c): Set Up Lead Administration

Use this procedure to set up lead administration.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Lead Administration.
2. Select the Rank Mapping tab.
3. Enter the lead score ranges and their ranks.

The ranges of values determine how the points assigned to each lead by the score card are mapped into lead ranks.

The greater the number of points assigned by the score card, the hotter the lead. For this reason, assign the low scores to the low lead ranks and the high scores to the hot lead ranks. For example, you may wish to designate a score between 1 to 25 points as a cold lead and a score between 201 and 300 points as a hot lead.

The range of values cannot overlap.

4. Make sure that the Enabled check box is selected for those rank mappings you wish to use.
5. Click **Save** on the toolbar.

6. Set up required fields for lead qualification:
 - a. Log in under the System Administrator responsibility.
 - b. Navigate to Profile > System.
The Find System Profiles window appears.
 - c. Enter OS%Required in the Profile field.
 - d. Click **Find**.
The System Profile Values window appears.
 - e. Setting any of the following profile options to Y requires users to make entries in the corresponding fields before a lead can be turned to the status of qualified:
 - * OS: Budget status required
 - * OS: Campaign code required
 - * OS: Contact phone required
 - * OS: Contact Role required
 - * OS: Decision Time frame required
 - * OS: Project name required
 - * OS: Sales channel required
 - * OS: total budget amount required
 - f. Click **Save** on the toolbar.

19d): Set Up Lead-Related System Profiles

Set up the following system profiles for leads. (For descriptions of individual profile options, see the system profile option table in Step 23).

Lead-Related System Profile Options

User Profile Name

ASO: Product Organization

Default Status

JTF_PROFILE_DEFAULT_
CURRENCY

Lead-Related System Profile Options

User Profile Name

OS: Customer Address Required for Customer, Opportunity and Sales Lead

OTS: Assign New Lead Manually

OTS: Rank Lead Option

Step 20: Set Up Opportunity Management

Log in as sysadmin responsibility -- go to **profiles>system** to see the default values

Sales representatives can categorize opportunity purchases using three variables.

- Sales Status is a user-defined and modifiable classification required for forecasting roll-ups. This classification can be user-defined. Statuses can be defined as open or closed. If the status is closed, it can be further defined as won or lost. Status can also be flagged as forecastable.
- Win Probabilities: the percentage chance that a particular purchase will be won. This is a user-modifiable classification which defaults to ten win probabilities in ten percentage increments, from 0 to 100.
- Sales Stages is a user defined and modifiable classification starting with the initial contact with a customer through to the sale.

20a) Set Up System Profiles for Opportunities

Set up opportunity-related system profile options (For descriptions of individual profile options, see the system profile option table in Step 23):

Opportunity-Related System Profile Options

User Profile Name

ASO: Default Order Type

ASO: Product Organization

Default Status

JTF_PROFILE_DEFAULT_CURRENCY

Opportunity-Related System Profile Options**User Profile Name**

 OS: Customer Address Required for Customer, Opportunity and Sales Lead

 OS: Daily Conversion Type

 OS: Default Close Date Days

 OS: Default Opportunity Sales Stage

 OS: Default Opportunity Status

 OS: Default Opportunity Win Probability

 OS: Default Sales Channel

 OS: Generate Opportunity System Notes

 OS: Inventory Category Integration

 OS: Opportunity Probability Link

 OS: Opportunity Sales Credit Enforced Sales Team Definition

 OS: Sales Team Creator Keep Flag

 OSO: Opportunity Probability Link

 OS: Allow Updating Frozen Opportunities

20b) Opportunity Status

There is a set of predefined statuses included with the application. You may choose not to use the predefined set and create customized statuses of your own. Or, you can use both the predefined set and additional customized statuses.

The following statuses are predefined:

- Active
- Inactive
- Lost

- Won
- Forecast
- No Opportunity
- Dealer
- Expired
- Preliminary
- Upside
- New Opportunity

Use the following procedure to define Opportunity Status.

Steps

1. Under the Sales Administrator responsibility, choose **Oracle Sales Set up > Opportunity > Status**
2. Enter the status code meaning and description for the status. The meaning is displayed on the user interface.
3. The Open checkbox is used to signify whether the opportunity is open or closed. If the checkbox is selected, it means that the opportunity is open.
4. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox in the Used For region.
5. The Win Loss Indicator region indicates whether the deal has been won, lost, or closed. If the open flag is unchecked, then the choices are won, lost, or neither.
6. Select the Used in Forecast checkbox in order to be able to include the opportunity in the forecast.
7. Select the Enabled checkbox to activate the opportunity status.
8. Save your work.

20c) Modify Win Probabilities

Win probabilities are used to calculate weighted pipeline amounts (opportunity amount multiplied by win probability).

There is a set of predefined Win Probabilities included with the application. You may choose not to use the predefined set and create customized win probabilities of

your own. Or, you can use both the predefined set and additional customized Win Probabilities.

Use the following procedure to define or modify Win Probabilities.

Steps

1. Choose **Oracle Sales Setup > Opportunities > Win Probabilities** under the Oracle Sales Administrator responsibility.
The Define Win Probabilities Window appears.
2. To enter a new probability:
 - a. Click in a **Win Probability** field in a new row.
 - b. Enter a Value between 0 and 100.
3. Enter or change the information in the **Meaning** and **Opportunity Status** fields.
If the profile "OS: Opportunity Status Override" is set to yes, then changing the win probability will set the status accordingly.
4. Enter a start date in the **From** field. An entry in this field is mandatory.
5. Optionally, enter an end date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
6. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Win probability will be displayed on the Partners Online screen, the Oracle Sales screen, or both. The default entry is All.
7. Click the Enabled checkbox to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user's interface.
8. Save your work.

20d) Set Up Sales Stages

There is a set of predefined Sales Stages included with the application. You may choose not to use the predefined set and create customized Sales Stages of your own. Or, you can use both the predefined set and additional customized Sales Stages.

Use the following procedure to define or modify Sales Stages.

Steps

1. Choose **Oracle Sales Setup > Opportunities > Sales Stages** under the Oracle Sales Administrator responsibility.
The Sales Stages Window appears.
2. To enter a new Sales Stage:
 - a. Click in a **Name** field in a new row.
 - b. Enter a name to appear in the LOV.
 - c. Enter a description
 - d. Enter a minimum and a maximum win probability value for this stage in the **Min** and **Max** fields.

If the profile "OS: Opportunity Probability link is set to warning or error, users will only be able to select win probabilities within the range for the stage selected.
 - e. Enter a start date in the **From** field. An entry in this field is mandatory.
 - f. Optionally, enter an end date in the **To** field. If an end date is entered, the Sales Stage will be disabled after that date.
3. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Sales Stage will be displayed on the Partner Relationship Management screen, the Oracle Sales screen, or both. The default entry is All.
4. Click the **Enabled** checkbox to enable the Sales Stage. If the **Enabled** box is not checked, the Sales Stage will not be enabled.
5. Save your work.

20e) Define Credit Types (Order Management)

Forecast and other credit types need to be set up for use in Oracle TeleSales. Use the following procedure to define credit types.

Steps

1. Switch responsibility to Order Management Superuser.
2. Choose Set up > Sales > Credit Types
The Sales Credit Type window appears.

3. Enter the user defined Forecast Credit Type name and description in the appropriate fields.
4. Select the Quota check box if the forecast credit type applies to revenue quota sales credit that you assign to salespeople. This means if it is forecastable
5. Select the Enabled checkbox to activate the forecast credit type.
6. Enter values in profile options.
7. Switch responsibility to System Administrator, and choose **Profiles > System**
8. Query "OS: Forecast Sales Credit Type" and enter the value that you want to use for Forecast Sales Credits. The value must have the quota checkbox selected.
9. Query "OS: Compensation Sales Credit Type" to set compensation sales credits. The quota checkbox should be unchecked.
10. Save your work.

20f) Define Interest Types and Codes

Interest types and codes allow you to classify your accounts, contacts, opportunities, expected purchases, i.e., purchase lines, and the current environment.

Interest types and codes can represent classes of products your company produces or provide a way to classify accounts and opportunities according to the categories your organization cares about. Examples include geographic location, business size, industry, or economic sector. Interest types and codes can also be used for assigning territories and for forecasting.

20g) Define Interest Types

Interest Types can be used to classify your accounts, contacts, opportunities, and purchases in a number of ways. An interest type can represent any classification of products.

The Interest Type classification has three layers:

Interest Type

 Primary Interest Code

 Secondary Interest Code

Use the following procedure to define Interest Types.

Steps

1. Choose **Oracle Sales Setup > Sales Categories > Interest Codes and Types >Types** under the Oracle Sales Administrator responsibility.

The Interest Types Window appears.

2. Select the first blank **Type** field and enter the name of the interest type.
3. Optionally, enter a description in the **Description** Field.
4. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Contact Interest, Opportunity Classification, Expected Purchase).

Note: Oracle TeleSales does **not** use interest types for account Oracle TeleSales uses the Trading Community Architecture (TCA) Customer Classification lookup. See the Lookup section of this document.

5. Select the Globally Enabled checkbox to indicate that the classification is to be activated throughout the entire implementation. Or, alternatively, select the Enabled by Organization checkbox if the classification is only to be activated within the specific organization.
6. Click the **Enabled** checkbox to enable the interest type. If the **Enabled** box is not checked, the interest type will not appear in the user's interface.
7. Save your work.

20h) Set Up Interest Codes

For every interest type you can have two levels of interest codes: primary and secondary.

If you are defining interest types to classify your company's products, use the primary code to identify large groupings of products. For example, for a computer company you might use the primary codes computer, peripherals, connectors, printers, and so on. You might then use the secondary codes for product families: desktops, laptops, modems, ink-jet printers.

Use the following procedure to create Interest Codes.

Steps

1. Choose **Oracle Sales Setup > Sales Categories > Interest Codes and Types >Codes** under the Oracle Sales Administrator responsibility.

The Interest Category Sets window appears.

2. Enter the **Interest Type** you wish to set up codes from the List of Values (LOV). The group of checkboxes display where this Interest Type can be used. They are read only and cannot be modified.
3. Click Find to see what codes, if any, have been set up for this Interest Type. The Primary and Secondary Code regions will display the results of the search.
4. In the Primary Codes region, enter the different values desired for the Interest Type. If you are also setting up Secondary Codes, the values entered here will be variables with Secondary Codes as their values.
5. If you are setting up Secondary Codes, click in the **Code** field of the appropriate Primary Code.
6. In the Secondary Codes region, select a blank line and enter a Code and Code Description. If no blank line is available, click the **New Record** button on the toolbar to create one.
7. Save your work.

20i) Defining Inventory Structures

Refer to the *Oracle Inventory User's Guide* for information about defining inventory structures.

20j) Map Category Sets

If your company uses Oracle Inventory, a great deal of set up time can be saved by importing the category sets and categories to populate the Interest Types, Primary, and Secondary codes in Oracle TeleSales. Category Sets from Oracle Inventory create Primary Interest Codes, and Inventory Categories become Secondary Interest Codes.

Use the following procedure to import interest types and codes from Oracle Inventory.

Steps

1. Choose **Oracle Sales Setup > Sales Categories > Interest Codes and Types >Category Sets Mapping** under the Oracle Sales Administrator responsibility.
The Interest Category Sets window appears.
2. In the **Category Set Name** field, select the Oracle Inventory Category from the LOV.

3. In the Interest Type field, enter the interest type you would like to populate with inventory category sets and categories. Category Sets populate Primary Interest Codes. Categories become Secondary Interest Codes.
4. Repeat Steps 2 and 3 until you have completed the mapping.
5. Click **Save** on the toolbar when finished.
6. You must run the *Create Interest Codes from Inventory Category Sets and Categories* concurrent program to bring over the Oracle Inventory information.

20k) Set Up Multiple Currencies

The multiple currency capabilities of Oracle TeleSales allow your organization to enter sales opportunities and forecasts in different currencies. Oracle TeleSales automatically converts them to a single currency of your choice when summing up forecasts and opportunity purchases in the pipeline.

Oracle TeleSales calculates currency conversion for individual opportunity purchases based on the daily rate on the date a sales representative predicts an opportunity is going to close (the close date). If a conversion rate is missing, then the program looks back in time to find a conversion rate. How far back is determined by setting the value of the profile OS: Maximum Roll Days for Converting Amount. If no rate is found within this period, then Oracle TeleSales repeats the search using the creation date of the purchase rather than the close date. The currency conversion type for opportunities is set by the profile OS: Daily Conversion Type.

If you are using multi-currency features of Oracle General Ledger (GL) in your company, then you can use the daily conversion rates being entered there. Otherwise, you must enter the conversion rates for each day using the Daily Rates Window.

Oracle Sales estimates currency conversion rates for the forecast periods based on one daily conversion rate. Because the rate for a whole period is based on one day's rate, these conversion rates are called "pseudo" period rates. You can choose to use the daily rate at the beginning or the end of a period. For example, if you are setting up the conversion rates for the month of January 2001, you can use either the daily rate on January 1 or January 31 as the rate for the whole month.

Forecasting uses currency conversions in two places: to calculate the total forecast amounts at the bottom of the forecast window and to sum all forecasts from the sales representatives to obtain group forecasts. In both cases it uses the pseudo period rates for the conversion.

Prerequisite Profile Option Setups for Global Forecasting

- Default Forecast Currency

Entering Daily Conversion Rates

If your company does not set daily currency conversion rates in Oracle General Ledger and you are planning to use multi-currency forecasts, you will need to enter conversion rates on a daily basis using the Daily Rates Window. Follow the procedure described below.

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > GL Daily Rates** under the Oracle Sales Administrator responsibility.
The Daily Rates window appears.
2. Click in the **From** field and enter the currency you are converting from the LOV.
3. If your currency does not appear in the adjacent **To** field, enter it from the LOV.
4. In the **Type** field, enter the conversion rate type from the LOV.
5. Enter the daily conversion rate in either of the currency conversion fields. The second rate will be calculated and entered automatically.
6. Repeat steps 2 through 5 for any other currencies.
7. Save your work.

Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

Follow the procedure below to be able to forecast sales in multiple currencies.

Steps

1. Set the profile option OS: Forecast Calendar to the calendar your organization is using.
2. Follow the steps for the procedure "Setting Up Conversion Types for Period Types" below to enter the types of conversion rates you will use for each period type such as fiscal year, month, or quarter for the calendar you selected in step 1.
3. Set system profile OS: Date Mapping Type for Periods by choosing whether you want to use the daily rate from the start or end date of a period for currency conversion.

4. Follow the steps for the procedure "Defining Conversion Rates for Periods" below to search to see if the conversion rates have been entered for your periods. Enter any missing conversion rates.

Setting Up Conversion Types for Period Types

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > GL Daily Rates** under the Oracle Sales Administrator responsibility.
The Calendar window appears.
2. Enter the calendar for which you are setting conversion rates from the LOV.
3. Click **Find**. If any period types have conversion rates associated with them, the Types Mappings region will be populated.
4. In **Period Type**, use the LOV to enter a period type for which you wish to set up conversion rates.
5. In **Conversion Type**, use the LOV to enter the currency conversion type you want to use.
6. Check the **Updatable** and **Editable** checkboxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).
7. Repeat steps 4 through 6 for all period types in this calendar.
8. If you want these rates to be updatable and editable by the user, check the appropriate checkbox.
9. Save your work.

Defining Conversion Rates for Periods

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > Pseudo Period Rates** under the Oracle Sales Administrator responsibility.
The Pseudo Period Rates window appears.
2. Enter the calendar your organization is using from the LOV in the **Calendar** field. This should be the same calendar set up in OS: Forecast Calendar.

3. Select the **Start Date** or **End Date** radio button. Your selection must be the same as the one you made when you set up the OS: Date Mapping Type for Periods system profile.
4. If you want to modify information only about a single period, enter the period name in the **Period** field. If this field is left blank, the search will display all periods that have daily rates entered for them.
5. Click **Find**.
6. The Period Rates region will display all periods that have the rate values available.
7. If any periods are missing, you will have to add them manually:
 - a. Click in an empty **Period** field in the Period Rates Region (or create one by clicking the **New Record** button in the toolbar) and use the LOV to enter a period.
 - b. Using the LOV, enter the currency you wish to convert in the **From** field.
 - c. Using the LOV, enter the currency you wish to convert to in the **To** field.
 - d. Enter the rate in the **Rate** field.
 - e. Repeat steps a through d until you have added all the periods you wish to be able to forecast.
8. If you wish to modify any displayed rates, you can do so by making a change in the **Rates** field.

Note: You cannot modify the rate field if the **Updatable** checkbox is not checked. This checkbox is set in the Period Type and Daily Conversion Type Mappings window.
9. Save your work.

Reporting Currency Mapping

Reports are generated using reporting currency.

Steps

1. Choose **Oracle Sales Setup > Multi-Currencies > Reporting Currency** under the Oracle Sales Administrator responsibility.

The Reporting Currency window opens.
2. Enter transaction currency in the **Transaction Currency** field.

3. Enter reporting currency in the Reporting Currency field.
4. Enter the date the mapping is active in the **Start Date** field.
5. Optionally, enter the date the mapping ends in the **End Date** field.
6. Save your work.

Step 21: Set Up The Quick Menu

Set the system profile option Start Menu In Quick Menu to `TeleSales Quick Menu`.

Here is one possible solution for installations that have multiple applications running Quick Menu:

1. Create your own FND Menu. You can do this under the System administrator responsibility by navigating to **Applications > Menu**. See *Oracle Applications System Administrator's Guide* for more details. The menu must include all of the functions you want to use in the applications that use Quick Menu.
2. Set the system profile option Start Menu In Quick Menu to the new menu you created.

Step 22: Set Up Campaign Assignment And Wrap-up Administration

22a): Assign Campaigns to Agents

Use this procedure to assign campaigns to agents.

Note: Assigning campaigns to agents is required for Advanced Outbound.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Campaign Agent Assignment.

The Campaign Agent window appears.

There are two ways of assigning campaigns to agents:

- Assign campaigns to individual agents or sales groups using the Resource tab.

- Assign agents or sales groups to individual campaigns using the Campaign tab.

Both methods achieve the same result.

2. If you wish to assign campaigns to individual agents or sales groups, then:
 - a. Select the Resource tab.
 - b. If you wish to assign campaigns to individual agents, then select the Resource radio button.
 - c. If you wish to assign campaigns to sales groups, then select the Resource Group radio button.
 - d. Click **Search** to the right of the Name field.
The Teleagent Resource Search window appears.
 - e. Enter search criteria.
 - f. Click **Find**.
 - g. Select one of the agents among the list of results which appear below.
 - h. Click **OK** to enter the agent and close the search window.
 - i. Click **Find** next to the Campaign Name field.
 - j. All of the available campaigns display on the left side of the window.
 - k. Use the arrow keys to move the campaigns you wish to assign to the right.
 - l. When you are done, click **OK**.
3. If you wish to assign agents or sales groups to campaigns, then:
 - a. Select the Campaign tab.
 - b. Click **Search** to the right of the Name field.
The Campaign Search window appears.
 - c. Enter search criteria.
 - d. Click **Find**.
 - e. Select one of the campaigns in the list of results which appear below.
 - f. Click **OK** to enter the campaign and close the search window.
 - g. If you wish to assign individual agents to the campaign, then select the Resource radio button.

- h. If you wish to assign sales groups to the campaign, then select the resource group radio button.
- i. Click **Find** next to the Name field.
- j. All of the available agents or sales groups appear on the left side of the window.
- k. Use the arrow keys to move the agents or sales groups you wish to assign to the right.
- l. When you are done, click **OK**.

22b): Create Outcomes, Results, and Reasons for Call Wrapup

Use this procedure to create the categories used to track the outcome of agent calls. These categories are used by management to determine agent performance.

There are three types of categories:

- **Outcomes:** Outcomes of the agent activities. For example, the agent makes contact, gets a wrong number, leaves a message, or receives a busy signal.
- **Results:** The results of the outcomes. For example, the agent makes a sale, or fails to make a sale.
- **Reasons:** The reasons for the outcomes. For example, the agent makes a sale because the price is lower than the competition, or the agent fails to make a sale because the customer already has a similar product.

An outcome can have multiple results and a result can have multiple reasons.

After you finish creating the outcomes, results, and reasons, you must [link them together using the Outcome Result Reason Assignment window](#).

Steps

1. Under the TeleSales Administrator responsibility, navigate to Call Wrapup Administration.

The Call Wrapup Administration window appears.

2. Set up the possible outcomes of agent call interactions. For each outcome:
 - a. Select the Outcome tab.
 - b. Enter a short code and a short description for the outcome. Both the code and the outcome description are visible to the agent in the List of Values. However, the agent can search only on the code.

- c. If your site is using Advanced Outbound and you wish to recycle calls, you must make a numerical entry in the Legacy Code field. See *Oracle Predictive Concepts and Procedures*
 - d. Enter the score and media type. These are free-form text fields. See the Implementing Oracle Interaction History section of the *Oracle CRM Foundation Implementation Guide* for details.
 - e. Optionally select the following check boxes:
 - * **Positive:** Includes this outcome in reports and queries.
 - * **Result Required:** Requires the agent to select a result for this outcome.
 - * **Generate Public Callback:** The callback can be rerouted to any agent.
 - * **Generate Private Callback:** Generates a callback for the agent who called the customer.
 - f. Optionally, enter a description. This description is for administrative purposes only and does not appear in the user interface.
 - g. Click **OK** to save the outcome.
 - h. If you wish to enter another outcome, then click **New** and repeat this procedure.
3. Enter the reasons for the outcome you created in the previous step. For each result:
- a. Select the Results tab.
 - b. Enter a short code and a short description for the result. Both the code and the outcome description are visible to the agent in the List of Values. However, the agent can search only on the code.
 - c. If your site is using Advanced Outbound and you wish to recycle calls, you must make a numerical entry in the Legacy Code field. See *Oracle Predictive Concepts and Procedures*.
 - d. Enter the score and media type. These are free-form text fields. See the Implementing Oracle Interaction History section of the *Oracle CRM Foundation Implementation Guide* for details.
 - e. Optionally select the following check boxes:
 - * **Positive:** Includes this result in reports and queries.
 - * **Reason Required:** Requires the agent to select a reason for this result.

- * **Generate Public Callback:** The callback can be rerouted to any agent.
 - * **Generate Private Callback:** Generates a callback for the agent who called the customer.
 - f. Optionally, enter a description. This description is for administrative purposes only and does not appear in the user interface.
 - g. Click **OK** to save the result.
 - h. If you wish to enter another result, then click **New** and repeat this procedure.
4. Create the reasons for the results you have created. For each reason:
- a. Select the Reason tab.
 - b. Enter a short code and a short description for the reason. Both the code and the reason description are visible to the agent in the List of Values. However, the agent can search only on the code.
 - c. If your site is using Advanced Outbound and you wish to recycle calls, you must make a numerical entry in the Legacy Code field. See *Oracle Predictive Concepts and Procedures*.
 - d. Enter the score and media type. These are free-form text fields. See the Implementing Oracle Interaction History section of the *Oracle CRM Foundation Implementation Guide* for details.
 - e. Optionally, select the following check boxes:
 - * **Generate Public Callback:** The callback can be rerouted to any agent.
 - * **Generate Private Callback:** Generates a callback for the agent who called the customer.
 - f. Optionally, enter a description. This description is for administrative purposes only and does not appear in the user interface.
 - g. Click **OK** to save the reason.
 - h. If you wish to enter another reason, then click **New** and repeat this procedure.

22c): Link Outcomes to Results and Reasons

Use this procedure to link together the outcomes, results and reasons you have created in the previous step.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Outcome Result Reason Assignment.

The Outcome Result Reason Assignment window appears. The window is divided into three panes displaying all of the outcomes, results, and reasons you have created.

2. Assign the results for each outcome:
 - a. Select the Current Record Indicator to the left of the outcome. This is the narrow unlabeled field to the left of the Code field.
 - b. Select the Assign check boxes for the results to be associated with the outcome.
 - c. Click **Save** in the toolbar.
3. Assign the reasons for each result:
 - a. Select the Current Record Indicator to the left of the result. This is the narrow unlabeled field to the left of the Code field.
 - b. Select the Assign check boxes for the reasons to be associated with the outcome.
 - c. Click **Save** in the toolbar.

Guidelines

If you wish to add any additional outcomes, results, or reasons, click **New** and make your entry in the Call Wrapup Administration window using the procedure described in [Create Outcomes, Results, and Reasons for Call Wrapup](#).

Clicking the Details button displays the details of the selected outcome, result, or reason.

22d): Assign Outcomes to Campaigns

Use this procedure to assign outcomes to campaigns. Different campaigns require different outcomes. For example, you may wish to use "leave message" as an outcome for a customer satisfaction campaign, but not for a sales campaign.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Campaign Outcome Assignment.

The Campaign Outcome Assignment window appears.

2. Select the campaign using the Campaign List of Values (LOV).
3. Assign the outcomes to the campaign by moving the outcomes from the Available to the Assigned list using the arrow keys. For each outcome:
 - a. In the Available region, select the outcome.
 - b. Click the up arrow button.

The outcome is added to the list in the Assigned region.

4. Click **Save** on the toolbar.

Guidelines

If you wish to add any additional outcomes, results, or reasons, click **New** and make your entry in the Call Wrapup Administration window using the procedure described in [Create Outcomes, Results, and Reasons for Call Wrapup](#). Remember that you must [link any new results and reasons to outcomes](#) before you can use them.

Clicking the Details button displays the details of the selected outcome, result, or reason.

Step 23: Set Up Oracle TeleSales System Profiles

Oracle applications let you set up your applications according to your company's business requirements. System profiles define how an application behaves for users.

The procedure for setting up and changing profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Profile options can be set at four different levels:

- **Site:** Indicates that the profile option is set at the site level. The site level setting affects the entire database. The Value is either **Yes** or **No**.
- **Application:** Indicates that the profile option is set at the application level. When a profile option is set at this level it overrides the site level setting. The Value is either **Yes** or **No**.
- **Responsibility:** Indicates that the profile option is set at the responsibility level. The responsibility level setting affects users of a given responsibility. When a

profile option is set at this level it overrides site and application level settings. The Value is either Yes or No.

- **User:** This setting affects individual users. When set, it overrides values set at the site, application, and responsibility levels. The Value is either **Yes** or **No**.

The profile options which can be used for Oracle TeleSales have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)

Setting Profile Options

Use this procedure to set or change profile options.

Steps

1. Choose **Oracle Sales Setup > System Profiles** under the Oracle TeleSales Administrator responsibility.
The Find System Profile Values window appears.
2. Enter your search criteria in the Display region.
3. Click in the **Profile** Field. Enter a partial name of the profile using "%" as a wild card.
4. Click **Find**.

The found profiles are displayed in the System Profile Values window.

5. Click in the field of the profile you wish to set or change.
6. Select a value from the List of Vales (LOV).
7. Click **Save** on the toolbar.

The following table lists the Oracle TeleSales profile names, descriptions, and applicable default values.

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
AMS: Should Call to Pricing Modules to Be Made	Events	Must be set to <i>Yes</i> for Oracle TeleSales.	
AMS: Should Call To Inventory Modules To Be Made	Events	Must be set to <i>Yes</i> for Oracle TeleSales.	
ASO: Default Order Category	Collateral, events	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.	Order Capture
ASO: Default Order Type	Opportunities, collateral	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form launched from the Quote/Order tab.	
ASO: Product Organization	Leads, collateral, opportunities	Inventory organizational identification number used for displaying inventory items.	
Default Status	Leads, opportunities	Default status for new tasks. Setting: all levels.	New
JTF_PROFILE_DEFAULT_CURRENCY	Leads, opportunities	Default currency for transactions. Setting: all levels	USD
OS: Budget status required	Lead management	A setting of <i>Y</i> requires users to enter a budget status for a lead before that lead can be qualified.	Y
OS: Campaign code required	Lead management	A setting of <i>Y</i> requires users to enter a campaign code for a lead before that lead can be qualified.	Y
OS: Compensation Sales Credit Type	Opportunities	Compensation sales credit type.	
OS: Contact phone required	Lead management	A setting of <i>Y</i> requires users to enter a phone number for a lead contact before that lead can be qualified.	Y
OS: Contact role required	Lead management	A setting of <i>Y</i> requires users to enter a role for a lead contact before that lead can be qualified.	Y

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Customer Access Privilege	eBusiness Center, organizations, persons, lookups	Specifies level of access to customer records. Available settings: Full: Update and view all customer information, Sales Team: If you are a member of the sales team you can view customer records. If you are designated as a sales team leader you can view and update. Prospecting: You can view all customer records, but cannot update any.	Full
OS: Customer Address Required for Customer, Opportunity and Sales Lead	Organizations, persons, leads, opportunities	If set to Yes, users must enter an address to create an organization, person, lead, and opportunity.	No
OS: Customer Sales Team Default Role Type	Organizations, Persons	Assigns a role type to a new sales team member if no role is specified by the user.	Account Manager
OS: Daily Conversion Type	Opportunities	Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types.	
OS: Decision time frame required	Lead management	A setting of Y requires users to enter a time frame for a lead before that lead can be qualified.	Y
OS: Default Close Date Days	Opportunities	Sets the default close date for an opportunity. The automatic close date is the creation date plus the number of days set in this profile.	30
OS: Default Opportunity Sales Stage	Opportunities	Default Sales Stage for new opportunity	Stage 1
OS: Default Opportunity Status	Opportunities	Default Opportunity Status for opportunity	Preliminary
OS: Default Opportunity Win Probability	Opportunities	The default win probability for new opportunities.	10-Prospecting (qualified)
OS: Default Sales Channel	Opportunities	Default sales channel for new opportunities	Direct

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Generate Opportunity System Notes	Opportunities	Determines whether or not notes are automatically generated whenever the opportunity is modified by a user.	Yes
OS: Inventory Category Integration	Opportunities	When set to <i>Yes</i> , this system profile uses product categories from inventory for the interest types.	Yes
OS: Manager Update Access	eBusiness Center, organizations, persons, lookup	<p>This profile option sets the level of access for sales team members to update information for their subordinates in the sales organization.</p> <p>This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege.</p> <p>This profile has three possible settings</p> <p>U: Update.</p> <p>I: Inherit access privilege from subordinate.</p> <p>R: View data only.</p>	R
OS: Maximum Roll Days for Converting Amount	Opportunities	Maximum roll days for converting currency amounts if no daily conversion rate exists.	
OS: Opportunity Access Privilege	eBusiness Center, organizations, persons, lookup	<p>Controls the level of access to opportunities. The available settings are:</p> <p>Global Full: Update and view all opportunity information regardless of the organization you belong to.</p> <p>Org Full: Update and view all opportunities within your sales organization only.</p> <p>Sales Team: Members of sales teams can view opportunities only. Sales team members designated as sales team leaders can update opportunities.</p> <p>Prospecting: You can view all opportunities in all sales organizations, but cannot update any.</p>	Global Full

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Opportunity Sales Credit Enforced Sales Team Definition	Opportunities	If set to Yes, only people on the sales team are allowed to receive sales credit.	Yes
OS: Preferred Reporting Currency	Opportunities	Preferred currency for denorm programs.	US Dollar
OS: Project name required	Lead management	A setting of Y requires users to enter a project name for a lead before that lead can be qualified.	Y
OS: Sales Admin Update Access	eBusiness Center, organizations, persons, lookup	Decides which roles and groups have update privileges. This profile has three possible settings U: Update. I: Inherit access privilege from subordinate. R: View data only.	R
OS: Sales channel required	Lead management	A setting of Y requires users to enter a sales channel for a lead before that lead can be qualified.	Y
OS: Sales Lead Access Privilege	eBusiness Center, organizations, persons	Controls the level of access to leads. The available settings are: Global Full: Update and view all lead information regardless of the organization you belong to. Full: Update and view all leads within your sales organization only. Sales Team: Members of sales teams can view leads only. Sales team members designated as sales team leaders can update leads. Prospecting: You can view all leads in all sales organizations, but cannot update any.	
OS: Sales Methodology	Opportunities	Sales methodology	Object Oriented
OS: Sales Team Creator Keep Flag	Opportunities	Default keep flag for sales team creator.	

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Total budget amount required	Lead management	A setting of <i>Y</i> requires users to enter the total budget amount for a lead before that lead can be qualified.	Y
OS: Allow Updating Frozen Opportunities	Opportunities	Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze check box selected. This profile can be set at either the responsibility or the user level. When set to <i>Y</i> , this profile option allows the user or responsibility to make changes. An <i>N</i> setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze check box is selected. This includes the Freeze check box itself.	
OTS: Advanced Inbound Installation	Universal Work Queue	Set to <i>Yes</i> if Advanced Inbound has been installed.	
OTS: Advanced Outbound Installation	Universal Work Queue	Set to <i>Yes</i> if Advanced Outbound has been installed.	
OTS: Assign New Lead Manually	Leads	A setting of <i>Yes</i> means that the creator of a new lead must assign the lead by making an entry in the Assign to field. If set to <i>No</i> , a new lead is assigned by the Assignment Manager automatically after it is saved.	
OTS: Associate Relationship Location To Organization	Addresses	A setting of <i>Yes</i> , causes any address you enter for a contact at an organization (party of type party relationship) automatically to become an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. A setting of <i>No</i> turns this feature off.	Yes
OTS: Contact Role	Organizations, Persons	Sets the default contact role for an organizational contact.	
OTS: Default Country	Organizations, Persons	Sets the default country used for address creation.	

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OTS: Default Party Type	Organizations, Persons	Sets the default party type for the eBusiness Center header. Available values are: Person Organization Party Relationship	
OTS: Default Person Title	Organizations, Persons	Sets the default title for a person in the eBusiness Center header.	
OTS: Default Phone Line Type	Organizations, Persons	The default phone type for the eBusiness Center header.	
OTS: Default Quote Form	Quotes/Orders	Determines whether Oracle TeleSales uses the quote UI from Order Capture or from Sales for Comms.	Order Capture
OTS: Default Relationship	Organizations, Persons	The default selection for the Relation drop-down list in the eBusiness Center header.	
OTS: Default Site Usage	Organizations, Persons	The default type for the address in the eBusiness Center header. For example: Bill to, Ship to.	
OTS: Display Customer Profile	eBusiness Center	A setting of <i>Yes</i> enables the customer profile area of the eBusiness Center. A setting of <i>No</i> means the fields are disabled.	
OTS: Enable Address Validation	Organizations, Persons	A setting of <i>Yes</i> turns on address validation.	
OTS: Generate Collateral Activity	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of collateral activities such as sending out collateral.	
OTS: Generate Customer Activity	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of activities related to customer records.	
OTS: Generate Event Activity	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of activities related to events.	
OTS: Generate Lead Activity	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of activities related to leads.	

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OTS: Generate Opportunity Activity	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of activities related to opportunities.	
OTS: Identifying Address	Organizations, Persons	A <i>Yes</i> setting sets the address displayed in the header to be the identifying (primary) address for the party.	
OTS: Max Interactions Displayed	eBusiness Center	Determines how many interactions to display in the overview tab.	
OTS: Minimum Number of Characters for Lookup	All searches	Improves search performance by forcing agents to use a minimum number of characters for their searches.	None
OTS: Notes Interaction Activity	Interactions	If you wish to track activities for notes, then set this profile option to <i>Yes</i> .	
OTS: Primary Contact Role Flag	Organizations, Persons	Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window.	Y
OTS: Rank Lead Option	Lead	This profile option turns on the automatic ranking of leads using the score card. If set to <i>Manual</i> , then user scores leads manually by clicking the Rank button in the Lead Center window. Otherwise, the application scores leads automatically based on the values entered in the score card.	
OTS: Scripting Database SID	Scripting	Database SID for the scripting server.	
OTS: Scripting Embedded	Scripting	Determines whether scripting uses the user interface provided by Oracle TeleSales or by Scripting. If this profile is set to <i>Yes</i> , then the application uses the Oracle TeleSales UI. If set to <i>No</i> , then it uses the Scripting UI.	
OTS: Scripting Installation	Universal Work Queue	Set to <i>Yes</i> if scripting has been installed for TeleSales.	
OTS: Scripting JNDI	Scripting	Scripting CORBA middle-tier name. For example: /oracle/apps/ies/corba/common/master	

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OTS: Scripting Port	Scripting	Enter the port number for the scripting server.	
OTS: Scripting Server Host Name	Scripting	Enter the scripting server name. For example, ap806 sun	
OTS: Scripting Three Tier	Scripting	Has to be set to Yes to enable scripting.	Yes
OTS: Scripting Uses AOL User	Scripting	A setting of Yes allows TeleSales users to use scripts that have been set up for them.	
OTS: TeleSales Interaction Enabled	Interactions	If set to Yes, TeleSales records interactions after the interaction is started.	No
Start Menu In Quick Menu	eBusiness Center	Set the value to TeleSales Quick Menu to enable the Quick Menu for TeleSales. All applications using Quick Menu share this profile option.	

Step 24: Set Up Oracle TeleSales Lookups

Oracle TeleSales includes lookups with three different levels of modification:

- **System:** The implementer can only change the wording of a list of value (LOV) choices the user sees on the screen. No deletions or additions are allowed.
- **Extensible:** The implementer can change both the wording of the LOV choices and add new choices for the user.
- **User:** The implementer can change the lookup completely, deleting and adding LOV choices at will.

The following table lists lookups, their defaults, and the areas they affect.

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AMS	AMS_EVENT_PAYMENT_STATUS		Events	
AR	ACCOUNT_STATUS		Accounts	
AR	ADDRESS_LABEL		eBusiness Center	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AR	CODE_STATUS		Persons, organizations, Accounts	
AR	COMMUNICATION_TYPE		Persons, organizations	
AR	CONTACT_ROLE_TYPE		Persons, organizations	
AR	CONTACT_TITLE		Persons, organizations	
AR	CONTACT_TYPE		Persons, organizations, events, collateral	
AR	COUNTRY		eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting	
AR	CREDIT_RATING		Persons, Organizations	
AR	CUSTOMER_CATEGORY		Accounts, persons, organizations	
AR	CUSTOMER_TYPE		eBusiness Center	
AR	DAY		eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue	
AR	DEPARTMENT		Persons, organizations, lookup	
AR	FOLLOW_UP		Opportunities, Universal Work Queue	
AR	FORM_NAME		eBusiness Center, persons, organizations, leads, quotes/orders, Universal Work Queue	
AR	INTEREST_TYPE		Leads, opportunities, lookup	
AR	JOB_TITLE_CODE		Persons, Organizations	
AR	LANGUAGE		Persons, organizations, opportunities, events, lookup, scripting	
AR	MONTH		Lookup	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AR	NOTE_TYPE		eBusiness Center, leads, opportunities, events	
AR	OWNER_TABLE_NAME		Persons, organizations, opportunities, lookup	
AR	PARTY_RELATIONS_TYPE		Persons, Organizations	
AR	PARTY_SITE_USE_CODE		Persons, Organizations	
AR	PARTY_TYPE		eBusiness Center, persons, organizations, accounts, leads, opportunities, quotes/orders, events, collateral	
AR	PAYMENT_TYPE		Events	
AR	PHONE_LINE_TYPE		Persons, organizations, opportunities	
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	
AR	RESPONSIBILITY		Persons, organizations, Universal Work Queue	
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	BUDGET_AMOUNT		Leads, lookup	
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	DECISION_TIMEFRAME		Leads	
AS	INTEREST_USE		Opportunities	
AS	ISSUE		eBusiness Center, leads, opportunities	
AS	LEAD_CONTACT_ROLE		Leads	
AS	LEAD_SOURCE		Leads, opportunities	
AS	PRM_LEAD_TYPE		Opportunities	
AS	REJECT_REASON_CODE	ASSIGN_ERROR DUPLICATE VACATION	Leads	
AS	ROLE_TYPE		Persons, Organizations, accounts, lookup	
AS	SALESFORCE_RELATIONSHIP		Opportunities	
AS	UPDATE_ACCESS		eBusiness Center	
AS	VEHICLE_RESPONSE_CODE		Leads	
AS	VEHICLE_RESPONSE_CODE		Opportunities	
AS	VEHICLE_RESPONSE_CODE		Lookup	
ASO	ASO_ITEM_TYPE		Accounts	
ASO	ASO_QUOTE_RELATED_OBJECTS		Quotes/Orders	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AST	AST_QUOTE_ORDER_VIEW_BY_LIST	ORGANIZATION PERSON RELATIONSHIP	Quotes/Orders	
AST	AST_QUOTE_ORDER_VIEW_LIST	ORDERS QUOTES	Quotes/Orders	
AST	AST_SCALING_FACTOR	MILLIONS THOUSANDS	Persons, Organizations	
JTF	ACTION_TYPE	ADD ANSWER CREATE_FSR DEL INQ INTERACT RECONCILE SENT TRANSFER UPD UPDATE_FSR UPSELL WAIT XSELL	Events, Universal Work Queue	

Step 25: Set Up Flexfields

Set up flexfields according to the steps outlined in the *Oracle Applications System Administrator's Guide*.

Step 26: Enable Web Directory Assistance

Use this procedure to enable web directory assistance for agents.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Directory Assistance Administration.

The Web Directory Assistance Administration window appears.

2. Using your browser, navigate to the web directory assistance service you wish to use
3. Perform a search for any individual. For example, for John Doe in California.

Keep the page with the results open. You will need to refer to it for the rest of this procedure.

For example, navigate to www.superpages.com, select the People Pages tab, and search for John Doe in California.

The search returns a page with the following URL:

```
http://wpg2.superpages.com/wp/results.phtml?SRC=&STYPE=WS&PS=15&PI=1&WF=John&WL=Doe&T=&S=CA&search=Find&pow=0&rtid=wpg1.superpages.com
```

4. In the Proxy Host field, enter the name of your organization's proxy server.
5. In the Port field, enter the port number for the proxy server.
6. In the Search URL field, enter the part of the URL before the delimiter.
In the SuperPages.com example, the delimiter is ? so you enter:

```
http://wpg2.superpages.com/wp/results.phtml
```
7. In the CGI Server field, enter your name for this service. This is a free-form text field.
8. In the Next Page ID field, enter the text of the hypertext link that indicates the next page. You are entering the link text as the user sees it; not the HTML source. The text is case sensitive.
For example, in SuperPages.com that text is `Next`.
9. In the Max Pages field, enter the maximum number of pages of results you wish Oracle TeleSales to parse.
10. Select the Enabled check box.

Note: You can enable only one service at a time.

11. Enter the CGI switch separator.

In the SuperPages.com example this is &.

12. In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant. This is the portion that you made no entries in.

Note: You may need to perform additional searches to determine what portion of the URL remains constant.

In the SuperPages.com example this is: SRC=&STYPE=WS&PS=15&PI=1.

13. In the Trailer Constant field, enter the constant part of the URL after the search terms.

In the SuperPages.com example this is:
&search=Find&pow=0&rtid=wpgl.superpages.com.

14. Click **CGI Switches**.

The CGI Switches window appears.

15. Enter information on each of the switches. The switches are the CGI script variables used for your search criteria. In the SuperPages.com example these are: WF, WL, T, and S. For each switch:
 - a. Enter the switch in the Code field. The entry is case sensitive.
 - b. Enter the Data Separator. For SuperPages.com this is =.
 - c. Enter a number indicating the order this switch appears in the URL.
 - d. If user entry for this switch is required, then select the Required check box.
 - e. Select the appropriate check box to indicate the search criteria this switch is used for. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.
16. When you are finished entering the CGI switches, click **Save** on the toolbar
17. Click **Close**.

Step 27: Enable Directory Assistance

Use this procedure to enable the agent dialing of directory assistance numbers. You can set up multiple directory assistance numbers.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Phone Directory Assistance Administration.

The Phone Directory Assistance Administration window appears.

2. Enter information about the directory assistance services. For each service:
 - a. In the Name and Description fields, enter the name and description of the service. These are visible to the agents.
 - b. In the Country Code field, enter the country code for the country this service is in. If the country is the United States, then enter 01.
 - c. In the Phone Number field, enter the phone number. Any standard format is acceptable, for example: 555-1212.
 - d. Enter an extension, if any.
 - e. Make sure the Enabled check box is selected.
3. Click **Save** on the Toolbar.

Step 28: Run Concurrent Programs

Oracle TeleSales includes a number of programs that perform functions on groups of records in the database. These batch programs run on the server and are called concurrent programs.

For detailed instructions for running and maintaining concurrent programs, refer to the *Oracle Applications User's Guide* and the *Oracle Applications System Administrator's Guide*.

Concurrent Programs Used by Oracle TeleSales

Oracle TeleSales includes the following concurrent programs:

- **Assign Territory Accesses**: (optional). This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting two profile options:
 - OS: Territory Minimum Number of Records for Parallel Processing
 - OS: Territory Number of Child Processes
- **Generate Access Records** (optional)

- **Load Sales Credit Mviews:** (mandatory). Used for the home page bins. This program must be run initially before users can set up bins. This program loads the materialized view with sales credit information. No parameters are needed.
- **Refresh Sales Credit Mviews:** (mandatory). This program is used to run an incremental refresh of the materialized view. This program should be scheduled to run periodically.
- **Refresh of as_sales_credits_denorm:** (mandatory). Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters are:
 - Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh)
 - Incremental Refresh = Run in this mode for an incremental refresh.
- **Incremental refresh of as_mc_sales_credits_den table:** Used to refresh conversion rates. This programs should be run after transaction currency to reporting currency mapping is completed, or after changing any conversion rates. See Step 5k earlier in this document. Parameters are:
 - From Currency
 - To Currency

Running Concurrent Programs

Use the following procedure to run concurrent programs.

Steps

1. Under the System Administrator responsibility, choose **Security > Requests > Run**
2. Select Single Request.
3. Enter the name of the desired concurrent program, or select from the list of values.
4. Enter parameters.
5. Click **Submit**

