

Oracle[®] Partners Online

Users Guide

Release 11*i*

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A Acronyms

B Glossary of Terms

Send Us Your Comments

Oracle Partners Online Users Guide, Release 11*i*

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

Introduction

Welcome to Release 11*i* of the Oracle Partners Online Users Guide.

This preface explains how the guide is organized and introduces other sources of information that may help you. This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Partners Online

If you have never used Oracle Partners Online, Oracle suggests you attend one or more of the Oracle Partners Online training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Partners Online.

- Chapter 1 is an introduction to Oracle Partners Online.
- Chapter 2 is getting started with Partners Online.

- Chapter 3 gives an overview of understanding Partners Online.
- Chapter 4 discusses the Home page.
- Chapter 5 covers Opportunities.
- Chapter 6 details Forecasts.
- Chapter 7 covers the Customer tab and its various subtabs.
- Chapter 8 describes the other tabs in the application.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Partners Online.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Partners Online shares business and set up information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Partners Online.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

The *Oracle Sales Online Users Guide* may provide additional background information to functionality found in Oracle Partners Online.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Partners Online (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind applications-wide features such as Business Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Partners Online and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Partners Online working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with

expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Oracle *MetaLink*

Oracle *MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle *MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (<http://metalink.oracle.com>).

Alerts: You should check Oracle *MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to

track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Introduction to Partners Online

1.1 Overview

Oracle Partners Online assists an organization in maintaining, tracking, managing, and communicating with its partners. Partners Online provides facilities for managing leads, tracking and sharing opportunities with partners, forecasting sales, managing partner and customer information, sending outbound information, and calendaring activities, tasks and notes.

Partners Online facilitates these actions and tasks by providing a number of different responsibilities which are available the users of Partners Online. Partners Online is used not only by owning organization, the Vendor, but by Partners and Value Added Distributors (VAD) as well. Partners Online provides a central store of information available to all of the parties involved in a partners transaction.

1.2 Understanding Responsibilities

In Oracle Partners Online users can access only the functionality needed to perform the tasks associated with their responsibility level.

Various levels of responsibility differentiate user access to specific functionality within the application.

1. [Vendor Users](#)
 - a. [Channel Manager](#)
 - b. [Assignment Managers](#)
2. [Vendor Administrator](#)
3. [Partner User](#)
4. [Partner Administrator](#)

5. [VAD User](#)
6. [VAD Administrator](#)

1.2.1 Vendor User

Vendor Users can have multiple roles such as Channel Manager, Channel Marketing Manager and Assignment Manager.

Channel Managers are the overall owner of the relationship with the partners. They support specific named partners or partners that have certain characteristics. Channel managers also assist in managing and the dissemination of information to and from partners.

Assignment Managers are responsible for assigning indirect opportunities to appropriate partners.

1.2.2 Vendor Administrator

The Vendor Administrator has access to Oracle Partners Online administrative setups to define custom profile attributes, attribute values, time-outs, status notification and partner user accounts.

1.2.3 Partner User

Partner access to Partners Online enables partners to perform the following tasks:

- View/Maintain their own profiles.
- Create and manage their customers.
- Create opportunities.
- View offered, active, inactive, won, and lost opportunities.
- Accept/decline an offered opportunity.
- Modify, update, and progress the opportunity after it is accepted.
- Create and manage forecasts.
- View, modify and create service requests.

1.2.4 Partner Administrator

The Oracle Partners Online Administrator performs the following tasks: Create and manage users, logins and passwords.

1.2.5 VAD User

The VAD (Value Added Distributor) user performs the same types of tasks as the [Partner User](#), with the exception of the following:

- The VAD sees a partner tab link, that isn't available to the partner. The VAD can create and manage their own partners.
- The VAD can choose to work an opportunity themselves, or pass it to one of the smaller partners that they manage, without going through the vendor.

1.2.6 VAD Administrator

Just like the VAD user, the VAD Administrator has the same types of duties as the Partner Administrator, with additional ability to create/manage users logins and passwords for all of the partners that they manage.

1.3 Navigation

The following table describes navigation in Partners Online. Navigation is shown in this document in this general form:

Tab > Subtab > Side Navigation Menu Item

or

Tab > Subtab > Command Button

Table 1–1 Navigation in Partners Online

Item	Used for
Tab	Separate the application into major functionality groups.
Subtab	Separate the major functionality groups into their individual functionalities.
Side Navigation Menu Item	Displays information regarding a particular marketing Object, such as a Budget or a Campaign.
Command Button	A command button takes some action, such as Update an object or Create an object.
Link	Object names in a summary page view are linked to their respective details page. To view an existing object from the summary page, click the name link of the desired object.

Table 1–1 Navigation in Partners Online

Item	Used for
Field Name with *	<p>Field names marked with an asterisk (*) are required fields. Only fields which are required for every variety of a particular object are marked as required, however, in some instances, a particular variety of object may have a required field that is not marked. If that field is not completed before the Create or Update button is clicked, an error message will be displayed indicating the required field.</p> <p>For example, certain fields for a email campaign may be required while a direct mail campaign would consider the same fields optional.</p>
Lock Icon	<p>An icon of a padlock is displayed next to objects in a summary page if you do not have rights to edit that object. Clicking that objects link will not display the details page for that object, but instead will be display an on-screen report of the field information for the object.</p>

1.4 Workflow and Email Alerts

Through Oracle Workflow, Oracle Partners Online increases vendor and partner efficiency by automatically updating routing statuses and automatically routing opportunities to and from various parties. Oracle Workflow features and notifications include:

- Automatic email alerts to channel manager to notify assignment of an opportunity to the partners that he/she manages.
- Automatic routing status update from matched to “offered” once the channel manager has approved the routing to the partner.
- Automatic routing of an opportunity (with an email notification) to the assigned partner upon approval of the CM.
- Automatic routing status update to active upon partner acceptance.
- Automatic routing status update to recycled partner declines the offered opportunity.

1.5 Tracking Opportunity Flow and Status

Features Associated with Opportunity Flow Steps:

1. **Create Opportunity:** Import Opportunities from Oracle Telesales. Enter manually into OTS or OSO. Enter manually into Oracle Partners Online.
2. **Match Opportunity with Partner:** Rank Partner, Automated Search, Manual Search.
3. **Assign Opportunity to Partners:** Options for routing single, serial, broadcast and joint selling.
4. **Channel Manager Reviews the Assignment:** Assignment options: approve, reject, or modify. CM timeout sends lead to partner.
5. **Partner Accepts/Declines Opportunity:** Partner accepts or declines the opportunity. If partner accepts, status changes to Active. If partner declines a single offer, it returns to unassigned pool. If partner declines a serial offer, it goes to the next partner.
6. **Process Partner:** Track Partner's progress with opportunity. Routing Status: on hold, won, lost, and recycled.

Routing status during opportunity flow:

1. **Create Opportunity:** Routing Status/Unassigned: Access/Vendor User, Phone Support.
2. **Match Opportunity with Partner:** Routing Status/matched: Access/Vendor Users if they enter the opportunity.
3. **Assign Opportunity to Partners:** Routing Status/matched: Access/Vendor Users if they enter the opportunity.
4. **Channel Manager Reviews the Assignment:** Routing Status/matched: Access/Vendor Users of the assigned Partner.
5. **Partner Accepts/Declines Opportunity:** Routing Status/offered: Access/Vendor and Partner Users.
6. **Process Partner:** Routing Status/active: Access/Vendor and Partner Users.

Opportunity assignments approved by the Channel Manager:

1. Workflow automatically changes routing status to offered and routes the opportunity to the partner.

2. The partner user can not update an routing status when it is in the offered status.
3. The opportunity assignment field in the opportunity summary page cannot be modified by the channel manager during the time period between the channel manager's acceptance and the partner's acceptance of the opportunity.
4. If the offer is declined and it is a single assignment offer, Workflow automatically re-routes it to the channel manager with recycled status.
5. If the offer is declined and it is a serial assignment offer, Workflow automatically re-routes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner.
6. If none of the partners accept the opportunity then the routing status is changed to "recycled" and is sent back to the assignment manager.

1.6 Terms and Definitions

Assignment Manager: A vendor side role that has responsibility for assigning and routing opportunities to Partners.

Channel Manager: Channel managers are the overall owners of the relationship with the partners. They support specific named partners or partners which have certain characteristics. Channel managers assist in managing and dissemination of information to and from partners.

Preferred Partner/VAD: The desired distributor specified by an end customer for a specific sales deal, even though the vendor may offer the deal to another partner.

Value Added Distributor/VAD: A partner who purchases from the vendor and resells to other resellers or to the end customer.

Value Added Reseller/VAR: A business partner managed by a VAD or vendor; sometimes referred to simply as a partner.

Managed Partner: An organization or person who has a strategic agreement with the vendor to conduct certain transactions and is managed directly by the vendor.

Indirect Managed Partner/IMP: Smaller partner organizations that deal with VADs to purchase and resell specific vendor items. They don't have a direct relationship with the vendor.

Partner Contact: The primary contact for a partner, (the role responsible for administering all opportunities assigned to the partner) receives email notifications and accepts/declines opportunities on behalf of the partner.

Partner Timeout Period: Partner timeout is based on a partner's country; it is the time period during which a partner who has been offered an opportunity is expected to respond (accept/reject the opportunity) before the next action can occur. These time frames are user-defined and supported by Oracle Workflow through automatic emails, notifications, and routing status changes.

Single Assignment: In this routing option, the assignment manager assigns an opportunity only to the top ranked partner.

Serial Assignment: In this routing option, an opportunity is offered successively to the partners ranked highest to lowest, until an assigned partner accepts the opportunity.

Broadcast Assignment: In this routing assignment option, the assignment manager assigns an opportunity simultaneously to multiple partners, and whoever accepts the opportunity first is the partner that receives the opportunity.

Joint Selling: In this routing option, the AM offers an opportunity to multiple partners. Multiple partners can accept the opportunity and work together on it.

1.7 Tab Descriptions

The functionality (for all users/Vendor, Partner and VAD) for Oracle Partners Online is organized by the following tabs.

- [Home](#)
- [Opportunities](#)
- [Forecast](#)
- [Customer](#)
- [Partner \(VAD & Vendor Only\)](#)
- [Support](#)
- [Administration \(Administrator Responsibilities Only\)](#)
- [My Company \(VAD & Partner Only\)](#)

1.7.1 Home

Oracle Partners Online provides even more home page tools. Users can choose from opportunity, lead and forecast bins that provide key metrics about win/loss, pipeline status, and forecast progression with drill down capabilities to the next level of metrics.

1.7.2 Opportunities

Vendor

Oracle Partners Online allows users to create, view and update sales opportunities. Users can enter various opportunity details such as customer, product interest, total budget, sales team, notes, tasks, attachments, etc. Vendor users can assign opportunities to appropriate partners by using partner matching engine. Vendor user can track status of an opportunity beginning to end.

Partner

Partner users can view opportunities offered to them by vendor organizations. They have a limited view of the opportunity until they accept it. Upon acceptance of an opportunity, partner users get full access to opportunity details. Partner users can create their own opportunities as well.

1.7.3 Forecast

Oracle Partners Online allows vendor salespeople and partner users to generate product category and opportunity forecast worksheets. Resource hierarchy can be setup in such a way that partners users rollup into vendor organization via channel managers. This allows you to create global forecasts for multiple periods by taking partner forecasts into account.

1.7.4 Customer

The Customer subtab organization lists summary customer details. When the customer's organization name is selected, the main summary page appears with links to relationships, opportunities, notes, sales team, tasks, interactions, attachments and the 360 view. Only people on the customer sales team has access to this information.

The main page in organization detail, displays high level information, including addresses, customer category, annual revenue, total employees, year established, web site, lifetime value, sic code type and code, duns number, business line, tax id, fiscal year end and last order date.

1.7.5 Partner

Partner tab is available to the vendor and vad users. Using the partner tab, you can create and manage your partners. Oracle Partners Online allows you to define partner profile attributes under the administration tab. Using these custom defined

profile attributes, you can maintain and track the profiles of your partners. Partner profile information is used during the opportunity partner matching process in order to route opportunities to the appropriate partners. Oracle Partners Online also allows you to create and maintain contacts for your partner organizations.

1.7.6 Support

Partner and vendor users can access the solutions catalog to search for a solution. They can also create new service requests and view/update existing ones.

1.7.7 Administration

This tab enables the vendor administrator to setup status notification, time-outs, user registration, attributes, attribute values, the channel marketing manager and channel types setups.

1.7.8 My Company

Partners see information about their company. The company profile includes information about the fiscal year, annual revenue, last order date, tax id, web site, year established, and number of employees.

Personal profiles of partner contacts under My Company shows addresses, phone numbers, and other details. This information is Read Only.

Getting Started with Partners Online

The first time you log in to Oracle Partners Online, your profile and preferences have not yet been set. You can also decide which items to display on each summary page in Partners Online. The following actions are covered in this chapter.

- [Changing Account Information](#)
- [Personalization of the Partners Online Environment](#)
- [Setting Partners Online Preferences](#)
- [Setting Calendar Preferences](#)

2.1 Changing Account Information

Use the Profile page to change your password and view your user name.

Prerequisites

None

Navigation

Profile icon > Account Settings

The Profile icon is located in the upper right corner of the application page. By default, the page opens to the Personal Profile page. Use the Personal Profile subtab under Account Settings to change your password.

2.1.1 Changing Your Password

Click Change Password from the Side Navigation Menu to display the Change Password page.

Steps

1. Enter the current password.
2. Enter a new password.
3. Re-enter the new password in the third field. The passwords will be compared to each other. If they are not the same, you will receive an error and be asked to retype both the new password and the re-entered new password.

Note: You cannot change your user name. Only the system administrator may do this.

2.1.2 Personal Information

The Person Information item on the Side Navigation Menu displays your user name, but will not allow you to change it.

2.2 Personalization of the Partners Online Environment

This section of the Profile Page allows you to determine which responsibility will be used upon login in as well as allow you to switch responsibility to another available responsibility should you need the abilities available.

You can change the attributes of the screen display to modify the language, currency, and date formats, as well as the number of table rows to display.

You can also customize the Quick Menu with the desired menus.

2.2.1 Changing the Navigation Preferences

You can set the default or switch responsibilities from this page.

Navigation

Profile > Personalization > Navigation Preferences

Steps

1. To change the Current Responsibility select a new responsibility from those available on the drop down list.
2. To change the Default Responsibility select a new responsibility from those available on the drop down list.

3. Click Update to save your changes.

2.2.2 Changing the Display Preferences

Display Preferences govern the language, currency, date, time zones, display styles, completed and blank table rows and the quick find results.

Navigation

Profile > Personalization > Display

Steps

1. Select a Language from the drop down list.
2. Select a User Currency from the drop down list.
3. Select a Date Format from the drop down list.
4. Select a Client Time Zone which is the time zone in which the desktop computer is located in. If accessing from a mobile system, this setting should match the current time zone.
5. Select the Session Time Zone. This is the time zone in which the database server is located.
6. Select the Display Style. Most often there is only one to choose from.
7. Change the number of rows to display in a table. It may be advantageous for you to set this value higher than 10 to maximize the number of objects that may be displayed at one time without a screen repaint.
8. Change the number of blank rows to display in a table. If you are a user who views data rather than enters it, you may wish to set this value to a number lower than 10.
9. Select whether the Quick Find Results should immediately go to the record detail if an exact match is made and skip the results page or should the results page always be displayed regardless of the number of records found.

2.2.3 Customizing the Quick Menu

The Quick Menu allows you to go directly to a particular menu. This functionality is not finalized and will be used in a future release.

2.3 Setting Partners Online Preferences

This section of the Profile page allows you to set your preferences for the various tabs within Partners Online. The preference that may be set are:

- [Setting General Profiles](#)
- [Setting Home Page Profiles](#)
- [Setting Opportunity Profiles](#)
- [Setting Forecast Profiles](#)
- [Setting Customer Profiles](#)
- [Setting Partner Profiles](#)
- [Setting Partner Matching Options](#)

2.3.1 Setting General Profiles

Use the General Preferences page to set the defaults for fields that are applicable to several tabs.

Navigation

Profiles > Partners Online Preferences > General

Steps

1. **Default Country:** From the drop down list, choose the default country that will be used throughout the application.
2. **Default Role:** This is the role assigned through the Resource Manager. It also indicates whether your role is a sales group member, manager or administrator. You may have one or many roles. This partially controls the opportunities you can view and the forecast data submitted. When you have multiple roles, it is important to recognize which one is your current role.
3. From the drop down list, choose which role you want as your default. If you have more than one role, the role you select here will appear as the default.
4. **Default Start Page:** Select the page that you want to appear when you log in to the application, if different from the Home page.
5. **Track Records for 'N' Days:** This controls the number of days to display the New and Modified icons next to any record that has been changed by another user or is new on a summary screen. Enter a number of days for which you

want to track records. The value must not exceed 14 days. Setting the value to zero will disable the feature.

6. **Display Creation and Modified Tracking:** Select the check box to display a footnote on the bottom of each updateable page that shows the creation date, last change date, and user id.
7. **Enable Record Counting:** Select the check box to show the number of records in a table, e.g., 1-31 of 100. Please note, if you disable record counting, the "Next" button will be active even if there are no more records to view. However, if you enable record counting the "Next" button will not display if there are no additional records.
8. Click Update to save your changes.

2.3.2 Setting Home Page Profiles

Until you have set your preferences, you will see an introductory message about setting preferences on the home page.

Your home page preferences are categorized into the following sections: Bin Preferences, Chart Preferences, and Report Preferences.

Navigation

Profiles > Partners Online Preferences > Home Page

Steps

1. Use the Add New Rows button to add items to bins, charts, and reports.
2. **Narrow Bin Preferences:** A small table of information for specific data types. Available Bins are: Top Performers, New Leads, Win Loss Ratio, My Favorite Reports, Open Opportunities, Won Opportunities, Forecast, Opportunity Status, System Counts and My Offered Opportunities.

To decide the order that the bins will display on your page, choose a number for each bin that you want to use on your home page. Additionally, from the drop down lists, you can set the number of rows for each bin that you want to see and the frequency.

Please note, since an opportunity may contain more than one product category, you may see a difference in the number of opportunities as compared to the number of product categories when you are viewing an opportunity bin.

3. Chart Preferences: You can select and configure the Charts of your choice from a drop down list to display on your personal Home Page.
4. Report Preferences: To display reports on your home page, choose from the Report Name drop down list.
5. Click Update to save your changes.

2.3.3 Setting Opportunity Profiles

Navigation

Profiles > Partners Online Preferences > Opportunity

Steps

1. Default Sales Stage: The stages used in a sales cycle. These can be linked to a specific methodology or generic. Choose from the drop down list.
2. Default Win Probability: The chance of winning the opportunity expressed as a percentage. This is used to calculate the standard forecast amount, also known as the weighted forecast. Choose from the drop down list.
3. Default Status: The current status of an opportunity, showing whether the deal is won, lost, open or dead. Choose from the drop down list.
4. Default Close Date to 'N' Days Ahead: The default number of days in the future you plan to close opportunities. Enter the default number of days to plan you default close dates.
5. Default Channel To: The method of receiving an opportunity, usually direct or indirect. Choose either direct or indirect from the drop down list.
6. Default Sales Methodology: A predefined set of guidelines and tasks to assist sales people through the sales cycle. The methodology selected will automatically create a set of tasks assigned to the sales person creating/modifying the opportunity. Choose from the drop down list.
7. Default Response Code: Describes how the opportunity is received. Examples include via web, email, phone. Select a default response code from the drop down list.
8. Display Sales Methodology Progression: When checked, the sales methodology progression will be displayed as a bubble train on the opportunity detail screen.
9. Personalized Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and

select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page. Remove any non-seeded saved search by clicking the Remove check box.

10. Personalized Reports: Remove any saved reports by clicking the Remove check box. Note that Seeded searches cannot be removed.
11. Click Update to save your changes.

2.3.4 Setting Forecast Profiles

Navigation

Profiles > Partners Online Preferences > Forecasting

Steps

1. Default Forecast Period Type: This is the time frame used for the forecast: month, quarter, or year. Select from the drop down list.
2. Default Forecast Currency: The currency to be used when submitting the forecast. Select from the drop down list.
3. Default New Rows in Worksheet to: You have two options from which to select in this drop-down list, zero or pipeline. If you select zero, the Worst Case, Best Case, and Forecast fields defaults to zero. If you select pipeline, the Worst Case field displays Won Date values, the Forecast field displays the Weighted Pipeline values, and the Best Case field displays Pipeline amount.
4. Default Forecast Category: This category contains a list of product interest types to be included in the forecast. A separate forecast category could be configured for different lines of business.
5. Default Sales Credit Type: The sales credit type is the same credit type used in the sales credit screen of the opportunities. This can be a quota credit type or a non-quota credit type.
6. Auto submit Worksheet: This option controls which worksheets are automatically created when using the Generate Forecast feature. Select Opportunity, Product Category, Both, or None.
7. Opportunity Worksheet Threshold Amount: Enter the amount to be used as a cut-off for displaying opportunities in the opportunity worksheet.
 - A positive value in this field means threshold is turned on and will sum all rows with this amount or lower into one summary line.

- A null value assumes the feature is not being used and the application works as is, without a threshold set.
 - A zero value is treated as a threshold value and will sum all rows with a zero or negative value into one summary line.
 - Any opportunity with the amount less than the threshold amount will not be displayed.
8. Pipeline Calculation Using: This profile is related to the profile "Default New Rows in Worksheet To". If you set the Default New Rows in Worksheet To, equal to Pipeline, then this Pipeline Calculation Using profile will determine if you use System Defaults or Win Probability Based Defaults.

An example:

If the profile "Default New Rows in Worksheet To" is set to "Pipeline", and Worst case equals total dollars from opportunities with a win probability $\geq 80\%$ then Forecast equals total dollars from opportunities with win probability $\geq 60\%$ and Best case equals total dollars from opportunities with win probability $\geq 40\%$.

For all Open Opportunities with a win probability between 80-100:

- Best case = Opportunity amount
- Forecast = Opportunity amount
- Worst Case = Opportunity amount

Win probability 60-79:

- Best Case = Opportunity Amount
- Forecast = Opportunity Amount
- Worst case = 0

Win probability 40-59:

- Best case = Opportunity Amount
- Forecast = 0
- Worst case = 0

Win probability 0-39:

- Best case = 0
- Forecast = 0

- Worst case = 0

For an opportunity which is in won status, regardless of the win probability:

- Best case = Opportunity amount
- Forecast = Opportunity amount
- Worst case = Opportunity amount

9. Display Subordinate Current Pipeline Values: You can display subordinate current pipeline values on the summary page by selecting the check box. This will display a total of your subordinate's current pipeline values.
10. Display Grand Totals: To display grand totals on your Opportunity and Product Category worksheets.
11. Use the Aggregation table to Get the Pipeline on the Forecast Main Page: Aggregate tables contain a snapshot of the pipeline values vs. accumulating current values from the opportunities. This feature can be used to increase performance of the forecast page. A message indicates 'Aggregation tables were refreshed on <date & time>'.

Note: This can only be used by salespeople who manage sales groups. Selecting this option means that you will not be using real time data. Rather, the aggregated data is refreshed on a predetermined schedule, set in the forecast profile options, based on business requirements. You will see a message indicating when the aggregation tables were last refreshed.

12. Click Update to save your changes.

2.3.5 Setting Customer Profiles

From the Customer Preferences page, you can set your default values for the Organization, Person, and Contacts subtabs.

Navigation

Profiles > Partners Online Preferences > Customer

Steps

1. **Default Organization Phone Type:** This is the kind of phone for the organization, such as mobile, voice mail or general. Select from the drop down list.
2. **Default Person Phone Type:** This is the kind of phone for the organization, such as mobile, voice mail or general. Choose from the drop down list.
3. **Default Customer Category:** This is a way of grouping customers into standard categories. This is usually an company defined list of categories. Choose from the drop down list.
4. **Default Address Type:** This is the default address type that will be used when creating a new customer. Examples: Marketing, Billing, and Shipping. Select from the drop down list.
5. **Default Person to Organization Relationship:** This is the default person to organization relationship that will be used when creating a new relationship. The default relationship types include Contact of and Employee of. Choose from the drop down list.
6. **Default Organization to Organization Relationship:** Select from the drop-down list. Default relationship types include Competitor of and Partner of.
7. **Default Person to Person Relationship:** Choose from the drop down list. This is the default person relationship that will be used when creating a new relationship. These relationship types include Manager of, Spouse of, and Dependant of.
8. **Display Interactions for Last "number" of Days:** Enter a number to display interactions for n days in the past.
9. **Default Account Site Use:** Select from the drop down list. This is the default account site that will be used when creating a new customer. Values include Bill to, Ship to and Sold to.
10. **Default Customer Language:** Select from the drop down list. This is the default language of the customer.
11. **Personalized Organizational Searches:** The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.
12. **Personalized Contact Searches:** The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and

select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

13. Personalized Person Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.
14. The seeded searches, "My Organizations", "My People", and "My Person Relationships", cannot be removed because they are system wide defaults.
15. Click Update to save your changes.

2.3.6 Setting Partner Profiles

The Partner Profiles govern which organization is the default vendor and which partner and contact searches will be used for the summary page.

Navigation

Profile > Partners Online > Partner

Steps

1. Select the Default Vendor Organization from the drop down list.
2. Select a Search to use as the default Summary Page search for Personalized Partner Searches. Any of the three seeded searches: All Partners, Exchange Partners or Sales Partners may be selected as well as any saved searches (see Personalization below).
3. Select a Search to use as the default Summary Page search for Personalized Contact Searches. Any of the three seeded searches (All Partners, Exchange Partners or Sales Partners may be selected as well as any saved searches (see Personalization below).
4. Click Update to save your changes.

2.3.7 Setting Partner Matching Options

The Partner Matching Options are used to control which Automatic Partner Matching Rule to use and whether or not to use the Rule Engine Trace.

Navigation

Profile > Partners Online > Partner Matching Options

Steps

1. Select a rule to use for Automatic Partner Matching.
2. Select Yes or No for Rule Engine Trace.
3. Click Update to save your changes.

2.4 Setting Calendar Preferences

Calendar profiles control what data is displayed in calendar views and how that data is displayed. Most of these items have default values and only need to be setup once.

Calendar preferences include:

- [Setting the Personalize Preferences](#)
- [Setting Privileges Preferences](#)
- [Setting Group Calendar Preferences](#)
- [Setting Switch Calendars Preferences](#)
- [Setting Categories Preferences](#)
- [Setting the Time Zone Preference](#)

2.4.1 Setting the Personalize Preferences

The Personalize preferences determine whether or not notifications are issued, whether the calendar should be based on a 12 or 24 hour close and what are the start and end hours of the day.

Navigation

Profiles > Calendar > Personalize

Steps

1. Select whether notifications are issued. If notifications are turned on for your system, this will send an e-mail to other users when creating appointments and tasks.
2. Select the clock to be displayed as 12 hour or 24 hour.
3. Setup your normal work week by selecting the start and end days of the week, and the start and end times.

4. Select the appointment increments: 15, 30, 45, or 60 minutes.
5. Click Update to save your changes.

2.4.2 Setting Privileges Preferences

The Privileges preferences determine who may have View Only or Full Access to your calendar.

Navigation

Profiles > Calendar > Privileges

Steps

1. This screen has two sections, View Only Access and Full Access. Choose the access you wish to give another user.
2. Enter the person's username or partial username, click **Go**.
3. Select the person by clicking the link.
4. Click Add to add them to the list of people to have access to your calendar.
5. Click Update to save your changes.

Repeat this process for other users.

To remove a person from having access, click the username in the list and click Remove.

2.4.3 Setting Group Calendar Preferences

The Group Calendar preferences allow you to add or remove group calendars to which you belong.

Navigation

Profiles > Calendar > Group Calendar

Steps

1. To request a new group calendar, click Request New Group.
2. Enter the Name and Description of the Group Calendar.
3. Click Send Request.

4. This will notify the calendar administrator you are requesting a new group calendar.
5. To subscribe to an existing Group Calendar, click Subscribe to Group.
6. Enter the group calendar name, click Go.
7. Select the calendar displayed.
8. Select the Display Color and Enter the Prefix Event Title.
9. Click Subscribe.

2.4.4 Setting Switch Calendars Preferences

The Switch Calendars preference allows you to switch to a different calendar which is available to you.

Navigation

Profiles > Calendar > Switch Calendars

1. Select the calendar from the dropdown list.
2. Click Switch Calendar.

2.4.5 Setting Categories Preferences

On the Categories page, you may enter or remove categories of your choosing to be used with your calendar.

Navigation

Profiles > Calendar > Categories

Steps

1. Enter the name(s) of the Categories.
2. Click Update.
3. To remove a category, click the checkbox for each category.
4. Click Update.

2.4.6 Setting the Time Zone Preference

The Time Zone preference determines which global time zone you are located in.

Navigation

Profiles > Calendar > Time Zone

Steps

1. Select the time zone from the dropdown list.
2. Click Update to save your changes.

2.5 Quick Find and Advanced Search

Oracle Sales Online provides two ways to search for information: [Quick Find](#) and [Advanced Search](#).

Quick Find

Quick Find is a single field search.

To search using **Quick Find**:

1. Choose the item for which you are searching from the drop down list.

This function provides a simple lookup using the name of the following types of data:

- Email: matches the email address for organizations, people and contacts
- Opportunity: matches on the opportunity name
- Opportunity Owner: matches on the opportunity owner
- Organization: matches on the organization name
- Person: matches on the person's last name
- Contact: matches on the person's last name and they are defined as a contact
- Lead: matches on the lead name
- Company Research: links to the Hoover's Inc. company research database
- Appointment: matches on the appointment name
- Task: matches on the task name
- Notes: matches on the note name

The wildcard character ‘%’ (percent sign) can be used to replace one or more characters in the search string. The ‘%’ cannot be the first character in the search string.

2. Click **Go**.

The quick find displays only the basic information about the object.

There are profile options to control the level of access to customer, leads and opportunities. When the profile for customers is limited to Sales Team access, you will be able to find the organization, person or contact, but not view the detail screen.

When the profile for leads and opportunity is limited to Sales Team access, you will not be able to find any lead or opportunity unless you are on the sales team.

When the profiles are set to Full access, you will be able to find, view the details and update the objects.

Advanced Search

The Advanced Search is a parameter driven detailed search related to the tab that is active. In this search, you can save the search criteria and optionally use it as the default summary screen for the selected tab. In addition to a wide variety of parameters, you can select the columns that you want to display in the search results and select from three levels of sort criteria.

Example

You are trying to locate a person or contact in Oracle Sales Online and only have the person's telephone number and no additional information. Whereas the quick find button is limited to person, organization, email, etc., the advanced search feature allows you to customize your search.

There is a way to use Advanced Search to search by phone number in Oracle Sales Online.

You can search by phone number for person using the following navigation:

1. Customer Tab > Person > Advanced Search
2. Enter the person's phone number.
3. Click **Search**.

Steps

To search using **Advanced Search**:

1. Click the **Advanced Search** link or the Personalize button.

Advanced Searches are available with the following tabs:

- Customer
- Partner
- Lead
- Opportunity

2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

When saving a search, the name must be different than the seeded searches that are provided with the product. Once a search is saved, the name will become an option for the object's summary screen.

2.6 Your Home Page

The Home tab consists of Home, Tools, Marketing, News, and Encyclopedia subtabs. Your home page displays bins, reports, and charts based on the bins that are accessible to your responsibility level. You can also view the details of your bins by clicking the links in each bin.

The following table briefly describes each subtab:

Table 2–1 Listing of Subtabs on the Home Tab

Subtab	Description	Links or Features
Home	You can view different summary reports and charts from your home page by indicating your preferences through Administration > Home Page > Home Page Bins.	Bins, Charts, Graphs for viewing. Edit bin parameters using the Edit button.
Tools	You can use the External tools, such as Travel Reservations, and the Internal Tools, such as Territory Lookup, Resource Lookup, and Group Lookup from this subtab.	
Marketing	Displays marketing information	
News	Display news information from the Marketing Encyclopedia System, such as world, industry, internal, and competitor news from the home page. Indicate your preferences through Profiles > Homepage.	
Encyclopedia	<p>Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories.</p> <p>Channels can be classified as content or group and their access can be set to public or private. If you do not know the correct channel to use when publishing a document, then MES assigns the document to the correct channel by matching the document attributes to the channel attributes.</p> <p>For more detailed information on using Marketing Encyclopedia System, please refer to the <i>Oracle Marketing Encyclopedia System Concepts and Procedures Guide</i>.</p>	Oracle Sales Online's Encyclopedia subtab includes four subtabs; Category, My Channels, Publish, and Administration.

Note: To refresh the data in Lead and Opportunity bins and drill down reports, you must run the following concurrent programs whenever there is a change in data:

Initial Build of Opportunity and Lead Bins

Initial Load for Opportunities Reports

Understanding Partners Online

3.1 Overview

Oracle Partners Online is a tool to manage, develop, and facilitate partners of a vendor organization. To provide this ability, there are a number of responsibilities and profiles associated with Partners Online are assigned to various functional roles in the partner relationship. This chapter gives an overview of those responsibilities.

The application may appear differently to each of these responsibilities as each one has a set of rules and conditions that determine what facilities are available to it. This chapter also gives an overview of some of the common components of Partners Online and the business processes which it models.

3.2 Workflow and Email Alerts

Through Oracle Workflow, Oracle Partners Online increases vendor and partner efficiency by automatically updating routing statuses and automatically routing opportunities to and from various parties. Oracle Workflow features and notifications include:

- Automatic alerts from a channel manager to notify a partner of an assigned opportunity.
- Automatic routing status update from matched to “offered” once the channel manager has approved the routing to the partner.
- Automatic routing of an opportunity (with an email notification) to the assigned partner upon approval of the CM.
- Automatic routing status update to active upon partner acceptance.

3.3 Tracking Opportunity Flow and Status

Features Associated with Opportunity Flow Steps:

1. **Create Opportunity:** Import Opportunities from Oracle Telesales. Enter manually into OTS or OSO. Enter manually into Oracle Partners Online.
2. **Match Opportunity with Partner:** Rank Partner, Automated Search, Manual Search.
3. **Assign Opportunity to Partners:** Options for routing single, serial, broadcast and joint selling.
4. **Channel Manager Reviews the Assignment:** Assignment options: approve, reject, or modify. CM timeout sends lead to partner.
5. **Partner Accepts/Declines Opportunity:** Partner accepts or declines the opportunity. If partner accepts, status changes to Active. If partner declines a single offer, it returns to unassigned pool. If partner declines a serial offer, it goes to the next partner.
6. **Process Partner:** Track Partner's progress with opportunity. Routing Status: on hold, won, lost, and recycled.

Routing status during opportunity flow:

1. **Create Opportunity:** Routing Status/Unassigned: Access/Vendor User, Phone Support.
2. **Match Opportunity with Partner:** Routing Status/matched: Access/Vendor Users if they enter the opportunity.
3. **Assign Opportunity to Partners:** Routing Status/matched: Access/Vendor Users if they enter the opportunity.
4. **Channel Manager Reviews the Assignment:** Routing Status/matched: Access/Vendor Users of the assigned Partner.
5. **Partner Accepts/Declines Opportunity:** Routing Status/offered: Access/Vendor and Partner Users.
6. **Process Partner:** Routing Status/active: Access/Vendor and Partner Users.

Opportunity assignments approved by the Channel Manager:

1. Workflow automatically changes routing status to offered and routes the opportunity to the partner.

2. The partner user can not update an routing status when it is in the offered status.
3. The opportunity assignment field in the opportunity summary page cannot be modified by the channel manager during the time period between the channel manager's acceptance and the partner's acceptance of the opportunity.
4. If the offer is declined and it is a single assignment offer, Workflow automatically re-routes it to the channel manager with recycled status.
5. If the offer is declined and it is a serial assignment offer, Workflow automatically re-routes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner.
6. If none of the partners accept the opportunity then the routing status is changed to "recycled" and is sent back to the assignment manager.

3.4 Terms and Definitions

Assignment Manager: A vendor side role that has responsibility for assigning and routing opportunities to Partners.

Channel Manager: Channel managers are the overall owners of the relationship with the partners. They support specific named partners or partners which have certain characteristics. Channel managers assist in managing and dissemination of information to and from partners.

Preferred Partner/VAD: The desired distributor specified by an end customer for a specific sales deal, even though the vendor may offer the deal to another partner.

Value Added Distributor/VAD: A partner who purchases from the vendor and resells to other resellers or to the end customer.

Value Added Reseller/VAR: A business partner managed by a vad or vendor; sometimes referred to simply as a partner.

Managed Partner: An organization or person who has a strategic agreement with the vendor to conduct certain transactions and is managed directly by the vendor.

Indirect Managed Partner/IMP: Smaller partner organizations that deal with VADs to purchase and resell specific vendor items. They don't have a direct relationship with the vendor.

Partner Contact: The primary contact for a partner, (the role responsible for administering all opportunities assigned to the partner) receives email notifications and accepts/declines opportunities on behalf of the partner.

Partner Timeout Period: Partner timeout is based on a partner's country; it is the time period during which a partner who has been offered an opportunity is expected to respond (accept/reject the opportunity) before the next action can occur. These time frames are user-defined and supported by Oracle Workflow through automatic emails, notifications, and routing status changes.

Single Assignment: In this routing option, the assignment manager assigns an opportunity only to the top ranked partner.

Serial Assignment: In this routing option, an opportunity is offered successively to the partners ranked highest to lowest, until an assigned partner accepts the opportunity.

Broadcast Assignment: In this routing assignment option, the assignment manager assigns an opportunity simultaneously to multiple partners, and whoever accepts the opportunity first is the partner that receives the opportunity.

Joint Selling: In this routing option, the AM offers an opportunity to multiple partners. Multiple partners can accept the opportunity and work together on it.

Your Home Page

Sections in this chapter include:

- [Overview of the Home Page](#)
- [Editing a Bin or Chart](#)
- [Setting Up Bins, Charts, and Reports](#)
- [Using Territory Lookup](#)
- [Using Resource Lookup](#)
- [Using Group Lookup](#)

4.1 Overview of the Home Page

The Home Page is an important component of Oracle Sales Online. You can personalize this page to view charts, bins, and reports of critical sales data. The Home tab consists of Home, Tools, Marketing, News, and Encyclopedia subtabs. Your home page displays bins, reports, and charts based on the bins that are accessible to your responsibility level. You can also view the details of your bins by clicking the links in each bin.

The following table briefly describes each subtab:

Table 4–1 Home Page Subtabs

Subtab	Description	Links or Features
Home	You can view different summary reports and charts from your home page by indicating your preferences through Administration > Home Page > Home Page Bins.	Bins, Charts, Graphs for viewing. Edit bin parameters using the Edit button.

Table 4–1 Home Page Subtabs

Subtab	Description	Links or Features
Tools	You can use the External tools, which are pre-configured by the system administrator and link to external applications, such as Territory Lookup, Resource Lookup, and Group Lookup from this subtab.	
Marketing	Displays marketing information	
News	Display news information from the Marketing Encyclopedia System, such as world, industry, internal, and competitor news from the home page. Indicate your preferences through Profiles > Homepage.	
Encyclopedia	<p>Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories.</p> <p>Channels can be classified as content or group and their access can be set to public or private. If you do not know the correct channel to use when publishing a document, then MES assigns the document to the correct channel by matching the document attributes to the channel attributes.</p> <p>For more detailed information on using Marketing Encyclopedia System, please refer to the <i>Oracle Marketing Encyclopedia System Concepts and Procedures Guide</i>.</p>	Oracle Sales Online's Encyclopedia subtab includes four subtabs; Category, My Channels, Publish, and Administration.

Note: To refresh the data in Lead and Opportunity bins and drill down reports, you must run the following concurrent programs whenever there is a change in data:

Initial Build of Opportunity and Lead Bins

Initial Load for Lead Reports

Initial Load for Opportunities Reports

For information on running concurrent programs, please refer to the *Oracle Sales Online Implementation Guide, Appendix B*.

4.1.1 Editing a Bin or Chart

Navigation

Home

Overview

Bins display information in a table format.

Graphs are graphical representations of selected data.

Steps

1. Click the **Edit** button to change the bin parameters.
2. Change the bin parameters.
3. Click **Update**.

4.1.2 Setting Up Bins, Charts, and Reports

Navigation

Profiles > Sales Online > Home Page

Overview

Bins are snapshot reports of selected data in Oracle Sales Online.

Steps

To set up bins, charts, or reports on your home page follow these steps:

1. Click Add New Rows.
2. Select the Bin Number from the drop down list. This will indicate the order in which the bins appear on the home page.
3. Select the Bin Name from the drop down list.
4. Click **Update**.

A list of the available bins, charts, and reports:

- **New Leads:** This bin provides a count and amount of leads assigned to the user/period rolling up to a sales person. This bin shows leads created during the period regardless of their current status.
- **Opportunity by Close Date:** This chart provides the ability to graph the open opportunities by close date.
- **Opportunity by Status:** This chart provides the ability to graph the opportunity status.
- **Opportunity by Win Probability:** This chart gives the ability to graph the open opportunities by win probability.
- **Leads:** This chart gives the sales person the ability to graph new leads.
- **Forecast History-Self:** This chart gives the ability to graph the submitted forecast numbers for a sales person.
- **Forecast History-Subordinates:** This chart gives the sales manager the ability to graph the submitted forecast number for his/her subordinate sales representatives or groups.
- **Top Customers:** This chart gives the sales person the ability to graph the lifetime value of his/her top "n" customers.
- **Open Opportunities:** This bin gives a count and amount of all the forecasted open opportunities per period rolling up to a sales person. This bin is based on the "open" status of the opportunities.
- **Won Opportunities:** This bin gives a count and amount of forecasted won opportunities per period rolling up to a sales person. This bin does not check the status of the opportunity.
- **My Forecast:** This bin provides a list of all forecast numbers that have been submitted per period by a sales person.

- **My Favorite Reports:** This report provides a list of all the reports that you have saved.
- **Win/Loss Ratio:** This bin provides the amount of won opportunities, losses, and the ratio per period rolling up to a sales person. Win/Loss analysis is an effective tool used by management to measure the sales effectiveness of the organization. The percentage data is based on the total opportunity amounts.
- **Opportunity Status:** This bin provides the status of all your opportunities in an easy to read bin format. The queries for this bin are controlled by the following profiles:
 - Win Probability: ASF_OPP_VAR_WIN_PROB
 - Day Range: ASF_OPP_VAR_TIME_RANGE
 - Total Amounts: ASF_OPP_VAR_AMOUNT
 - Aging Range: ASF_OPP_VAR_AGING_DAYS

A list of available charts:

- Opportunity Chart by Close Date
- Opportunity Chart by Status
- Opportunity Chart by Win Probability
- Forecast History (self)
- Forecast History (group)
- Customer Chart by Top Customers
- Lead Chart by New Leads

Click **Add New Rows** to add new charts to your home page list. Select from the drop down list and click **Update**.

See Also

Please refer to the *Oracle Sales Online Implementation Guide section, Setting Up the Home Page*, for more information.

4.1.3 Using Territory Lookup

This tool provides a way for Oracle Sales Online users to locate the sales representative responsible for a particular territory. Please refer to the *Oracle CRM*

Foundation Concepts and Procedures guide for more information about the Territory Lookup Tool.

Navigation

Home > Tools > Internal Tools > Territory Lookup

Prerequisites

None

Steps

Follow these steps to use the Territory Lookup Tool:

1. Enter a full or partial organization name, using % as a wildcard.
2. Click **Go**.
3. Select the address for the company.

The list of salespeople who are resources for a territory for the selected company is displayed.

4. Optionally, enter the State.
5. Click **Search**.

A list of salespeople who are resources for a territory of the selected state is displayed.

4.1.4 Using Resource Lookup

This tool provides Oracle Sales Online users with a way to search for resources.

Navigation

Home > Tools > Internal Tools > Resource Lookup

Prerequisites

None

Steps

1. Enter at least one search parameter:
 - First or last name

- username
 - email address
 - resource number
 - employee number
 - manager name
 - job title,
 - work phone
 - salesperson number.
2. Click **Search**.
A list of resources with the resource name, employee number, job title, work phone, email, and manager is displayed.
 3. Click the resource name to display the resource detail screen.

4.1.5 Using Group Lookup

Navigation

Home > Tools > Internal Tools > Group Lookup

Prerequisites

None

Steps

This tool provides Oracle Sales Online users with a way to search for sales groups and find group members.

1. Enter at least one search parameter:
 - group name
 - number
 - usage
 - description
 - date range can also be entered
2. Click **Search**.

3. A list of groups with the description, group number, start and end date, parent group and child group(s) is displayed.
4. Click the group, parent, or child link to display the detail screen.

5.1 Opportunity Tab

One of the first steps in the Oracle Partners Online sales process is a sales opportunity, also referred to as a potential sale. This process begins with the initial customer contact, or lead, and ends when the sales rep converts the opportunity into a sale or loses the sale.

Once potential opportunities within a company have been identified, sales representatives can perform the following tasks:

- Identify how the opportunity came about
- Enter information on items to be purchased
- Track the likelihood of closing the sale
- Allocate sales credit for forecasting

Sales representatives can manage existing opportunities, assigned to them manually or automatically through Territory Assignment, or they can enter new opportunities. By default, the sales rep who created the opportunity has full access to the opportunity. Full access to the opportunity means that the sales rep who created the opportunity can add other sales team members, assign sales credits, and estimate the likelihood that an opportunity will succeed. Additionally, sales reps and their managers use this opportunity information to forecast sales under the forecast tab

The following tasks can be performed from the Opportunity tab:

- [Personalizing Opportunity Summary](#)
- [Creating an Opportunity](#)
- [Maintaining Opportunity Detail](#)

- Searching for an Opportunity
- Creating a Lead from the Opportunity tab
- Copying an Opportunity
- Creating a Quote from an Opportunity
- Adding Purchase Items (Opportunity)
- Sales Credits (Opportunity)
- Adding an Existing Contact to an Opportunity
- Creating a New Contact
- Notes (Opportunity)
- Sales Teams (Opportunity)
- Tasks (Opportunity)
- Adding an Existing Competitor (Opportunity)
- Creating a New Competitor (Opportunity)
- Attachments (Opportunity)
- Opportunity Matching
- Assign an Opportunity
- Accepting/Declining an Offered Opportunity
- Updating an Active Opportunity
- Managing Addresses
- Opportunity Reports
- Viewing My Reports and Charts

5.2 Personalizing Opportunity Summary

If you want to create personalized opportunity lists, for example, “My Opportunities Closing This Week” or “My Opportunities in Stage 3” follow the steps outlined below for personalizing. The lists that you create can be used as a summary page default so that they appear every time you click the Opportunity tab.

Steps

Follow these steps to personalize opportunities:

1. From the **Opportunity** tab, click **Personalize**.
2. Change, add, or remove parameters.

The following is a description of the “Include Account Manager Privilege” check box and how it works:

If a sales rep is an account manager for an organization, then he/she has access to all opportunities created for that organization.

The “Include Account Manager Privilege” check box is important if the person running the advanced search is either an account manager OR if someone in their sales hierarchy has the “account manager” privilege.

If the “Include Account Manager Privilege” check box is selected, the Advanced Search feature will display all opportunities for which:

- the user is on the sales team
- direct or indirect subordinates are on the sales team
- all opportunities for the organization for which the user is an account manager
- all opportunities for the organization for which a direct or indirect subordinate is an account manager

If the “Include Account Manager Privilege” check box is not selected, the Advanced Search feature will display opportunities for which:

- the user is on the sales team
- subordinates are on the sales team

3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as a Summary Page Default check box.
7. Click **Save** to save the list, or **Save and Apply Search to both save and apply the search**.

Saved Searches appear in a drop down list on the Opportunity page.

Note: The Advanced Search link and Personalize button take you to the same Opportunity Search page.

5.3 Creating an Opportunity

Prerequisites

A search for the opportunity should have been performed to ensure that a duplicate opportunity is not created.

Steps

Follow these steps to create a new opportunity:

1. From the Opportunity tab, make sure you are on the Opportunity subtab.
2. Click Create.

The Create Opportunity page opens.

3. Use the Select a Customer field and enter the full or partial name of the organization or person that you want to find. By default the system will search for organizations.
4. If the customer is located in a country outside of your country, select that country from the drop down list, click **Go**.

The Select a Customer page opens with the search results.

5. If you are searching for a person, instead of an organization, select the Person radio button and click **Go**.
6. Select a customer by clicking the customer link **or click Cancel to return to the previous page**.
7. If you do not find the customer that you are searching for, click **Create Customer**. Enter the customer information and click **Create**.

The Create Opportunity page opens.

8. The customer name and address, if selected, will be populated into the Create Opportunity page.
9. Enter an opportunity name, this value will be used throughout Oracle Partners Online to select and view opportunities.

10. Optionally, relate this opportunity to an existing project. Select the project and click **Go**. If you want to create a new project, select the Create a Project radio button and enter a project name.
11. Optionally, relate a campaign or offer to this opportunity. Enter the campaign name and click **Go**. You will also see a list of offers with the list of campaigns. Choose either the campaign or the offer.
12. Optionally, enter purchase items by selecting a Product Category and Amount. Please note, if you do not select a product category, that line will show a blank when you create the opportunity. You can search for inventory items by selecting a product category, entering a partial inventory item name and clicking **Go**. Choose from the list of inventory items. Additionally, select a Unit of Measure.

The list of Inventory Items is limited to the items that are mapped to the product category that you select. If product category is blank, you will see a full list of inventory items. When you choose an item, product category will be populated.

13. Optionally, enter Contacts. Add an existing person by entering the last name in the Add a Person field and clicking **Go**. To create a new person, the required fields are First Name, Last Name, and Relationship. Optional fields are phone number, email address, and opportunity role.

Note: When adding or creating a contact for this opportunity, you are also creating a relationship between this person and the customer for whom you are creating the opportunity.

14. To create a note, choose the Type from the drop down list. Select the Private check box, if you want to keep the note private. Enter the text in the Text box.
15. Click **Create**.

You have created the opportunity when the Opportunity Detail page opens. You can change data, enter additional information, go to the customer detail by clicking the customer name link.

5.4 Maintaining Opportunity Detail

Prerequisites

An opportunity must exist.

Steps

Follow these steps to maintain opportunity details:

1. You can access existing opportunities one of the following ways:

By clicking the opportunity's name link from the summary page, or:

- To search using **Quick Find**:

1. Choose Opportunity from the drop down list.
2. Enter the full or partial opportunity name.
3. Click **Go**.

- To search using **Advanced Search**:

1. Click the **Advanced Search** link.

- The Opportunity Search page opens.

1. Enter desired **Task Information** and **Display Options**.

2. Optionally, enter a Search Name, if you want to save the search.

3. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.

- The Opportunity Search Results page opens.

1. Select the opportunity by clicking the opportunity link. Alternatively, click **Modify Search** change your search filters and display options.

2. Add or update information such as Status, Sales Methodology, Win Probability, Close Date, Initiatives, Currency, Channel, Sales Stage, Budget, Transaction Amount by either selecting from the drop down list or entering information into the fields.

The opportunity freeze flag facilitates the opportunity lock out feature for this specific opportunity. Once this check box is selected, no one on the sales team is allowed to update the opportunity. This Freeze check box overrides all access privileges. However, users whose "Update Frozen Opportunities" profile option is set to Y (Yes) can update frozen opportunities and deselect the Freeze check box. For more information about changing a profile option, refer to the *Oracle Partners Online Implementation Guide*.

3. From the Opportunity Detail main page, you can enter Purchase Items. Click the Add Purchase Item button to start the process. Required fields are marked with an asterisk.

- The Opportunity Add Purchase Item page opens.
 1. Select the Product Category from the drop down list.
 2. Enter an Amount.
 3. Optionally, enter the following:
 - Inventory Item: enter a partial item name and click **Go**
 - Unit of Measure (UOM): enter a unit of measure
 - Quantity: enter a quantity
 - Campaign: enter a partial campaign name and click **Go**
 - Number of Purchase Lines: enter the number of purchase lines you would like for rolling opportunities
 4. You can select Forecast Date Intervals for rolling opportunities by selecting a Start Date and entering the Number of Days in the appropriate fields.
 5. Click **Add** to create multiple purchase lines with forecast dates in the above mentioned intervals.
- 4. Click **Update to save any changes.**
 - Additionally, from the Opportunity Detail main page, you can access further details about the opportunity by clicking links to Contacts, Notes, Sales Team, Tasks, Classifications, Competitors, and Attachments.

5.5 Searching for an Opportunity

Prerequisites

An opportunity must exist.

Steps

Follow these steps to search for an opportunity:

1. From the **Opportunity** tab, select **Quick Find or Advanced Search.**
 - To search using **Quick Find:**
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.

3. Click **Go**.
- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.

The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Optionally, enter a Search Name, if you want to save the search.
 4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 5. Select the opportunity from the search results page by clicking the opportunity link.

5.6 Creating a Lead from the Opportunity tab

Follow these steps to create a lead from the Opportunity Tab.

Steps

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.

The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Enter Search Name, if you want to save the search.
 4. Click **Search**.
1. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.

1. Click the **Leads** link.
2. Click the **Create** button.
The Create Lead page opens.
3. Select a customer by typing the full or partial name using % as a wildcard.
4. Select a location from the drop down list.
5. Click **Go**.
 - If you do not find the customer for which you wish to create a lead, click **Create Customer**.
1. From the search results page, click the customer's link.
Some customer information will populate the create lead page. Customer and Status fields are required fields.
The next items are optional and are in no specific order.
 - In the Purchase Items section, enter a Product Category and click **Go**.
 - Enter an Item ID, click **Go**.
 - Enter the unit of measure, quantity, and budget amount.
 - Enter a Campaign and click **Go**.
2. Click Create.

5.7 Copying an Opportunity

Prerequisites

An opportunity must exist. See [Creating an Opportunity](#).

Steps

Follow these steps to copy an existing opportunity:

1. You can access existing opportunities one of the following ways:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.

3. Click **Go**.
- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.

The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Click **Search**.
 4. Select an opportunity by clicking the opportunity link.
 - The Opportunity Detail Main page opens.
 1. From the Opportunity Detail main page, click **Copy**.
 - The Copy Opportunity page opens.
 - Copy Opportunity will create a new opportunity from this opportunity. You can select which attributes you want to copy by following the next steps.
 1. If necessary, enter new customer and address information in place of the existing information.
 2. Select “Copy Attributes” by clicking the check box next to items such as; Purchase Items, Sales Team, Sales Credits, Competitors, Opportunity Contacts, Sales Methodology.
 3. It is important that you click the **Update** button before the next step.
 4. Click **Copy**.
 - The opportunity contacts cannot be copied if the user changes the customer for the copied opportunity.

5.8 Creating a Quote from an Opportunity

Prerequisites

A quote must exist.

Steps

Follow these steps to create a quote from an opportunity:

1. From the **Opportunity** tab, select an opportunity using **Quick Find** or **Advanced Search**.

- To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
- The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Optionally, enter a Search Name, if you want to save the search.
 4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 5. Select the opportunity from the search results page by clicking the opportunity link.
- The Opportunity Detail page opens.
 1. Click **Create Quote**.
- The Create Quote page opens. The opportunity details are populated into the create quote page.
 1. Enter the quote name, a required field.
 2. Optionally, select a "Relate To" from the drop down list and enter the related entity.
 3. Enter an Invoice Address. To change the address, click **Change Address**.
 4. Find a Customer Contact by entering the full or partial name and clicking **Go**.
 5. Select a Channel from the drop down list.
 6. Select an Expiration Date by clicking the Calendar icon and choosing a date.
 7. In the Items section, Add an Item by entering the item name in the text box and clicking **Go**.
 8. Select the item from the search results page.
 9. To remove an item, select the Remove check box.

10. In the Notes section, enter a note by selecting the note type from the drop down list.
11. Enter the note text.
12. Click **Create**.

5.9 Adding Purchase Items (Opportunity)

Use this feature to split an opportunity purchase item over multiple forecast dates. For example, if your Opportunity plans to buy ten desktop computers per month for the next six months, you can enter all the information on this page with each order appearing as a purchase line. These items can be included in forecasting.

Steps

Follow these steps to add a purchase item:

1. From the Opportunity tab, click the Opportunity subtab.
2. Select an Opportunity from the summary table or use the Quick Find feature to search for an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter a the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.
 3. Click **Go**.
 4. Click **Add Purchase Items**.
 - The Opportunity Add Purchase Item page opens.
 1. Select the Product Category from the drop down list.
 2. Select an Inventory Item by entering a partial name, use the “%” key as a wild card, and click **Go**.
 3. Enter the Quantity and Unit of Measure (UOM).
 4. Enter the Amount, it is a required field.
 5. Select a Campaign by entering a partial name, use the “%” key as a wild card, and click **Go**.
 6. Enter the number of Purchase lines that you want to split your purchase line.

7. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.
8. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.
9. Click **Add** to create multiple purchase lines with forecast dates in above mentioned intervals.
 - You will see the new purchase lines on the opportunity detail page.

5.10 Sales Credits (Opportunity)

Oracle Partners Online provides this feature to distribute sales credits to salespeople and partners. Sales Credits include Forecast Credits and Other Credits. Forecast Credits are used for forecasting and can be split between multiple salespeople but must total 100% of the purchase item line, and Other Credits do not have to equal 100% of purchase items line. When creating an opportunity, 100% of each purchased item is allocated to the opportunity creator in Forecast Credits.

Please note, in order for a sales manager to receive sales credits, the sales manager must also have a role of sales representative. This can be achieved in the roles set up outlined in the *Oracle Partners Online Implementation Guide*.

- [Maintaining Sales Credits](#)
- [Adding a Salesperson](#)
- [Adding a Partner](#)

5.10.1 Maintaining Sales Credits

Prerequisites

None

Steps

Follow these steps to split sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.

2. Enter the full or partial name using % as a wildcard.
3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Click **Search**.
 - The Opportunity Detail page opens.
 1. From the Purchase Items table, under the Amount column, click **Split**.
 2. Choose [Adding a Salesperson](#) or [Adding a Partner](#).
 3. Enter the credit amount or percentage.
 4. Click **Update**.

5.10.2 Adding a Salesperson

Prerequisites

None

Steps

Follow these steps to add a person to receive sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 - 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.

1. Enter search filters and display options.
2. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. From the Purchase Items table, under the Amount column, click **Split**.
5. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
6. Select an employee by clicking the employee name link.
 - To search for an employee outside your business group, select the business group from the drop down list, click **Go**.
7. Enter credit amount (forecast or other).

5.10.3 Adding a Partner

Prerequisites

None

Steps

Follow these steps to add a partner to receive sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Click **Search**.

- The Opportunity Detail page opens.
- 1. From the Purchase Items table, under the Amount column, click **Split**.
- 2. In the Add a Partner field, enter the name of the partner, and click **Go**.
- 3. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a “sales” partner.
- 4. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop down list and click **Update**.
- The salespeople and partners to whom you have given sales credits will automatically be added to the sales team with non-full access.

5.11 Adding an Existing Contact to an Opportunity

Prerequisites

A contact must exist. See [Creating a New Contact](#).

Steps

Follow these steps to add an existing contact:

1. From the **Opportunity** tab, select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
1. Enter search filters and display options.
2. Click **Search**.
3. Select an opportunity by clicking the opportunity link.
- The Opportunity Detail page opens.

4. Click the **Contacts** link.
5. Enter the last name in the Add a Person field to search for a contact, click **Go**.
It is recommended that you search by last name only. This will search for people which have already established a relationship with this customer called contacts.
6. From the Select a Person page, choose from the list of search results by clicking the relationship link.
 - If you cannot find the person you are looking for, you can widen your search to look for all people checking the “Search All People” radio button.
 - If you select a person that does not have an existing relationship with this customer, you can choose a relationship type.
 - [Create a new contact](#)

5.12 Creating a New Contact

Before creating a new contact, check to make sure that this person does not already exist in the database.

Prerequisites

None

Steps

Follow these steps to create a new contact:

1. From the **Opportunity** tab, select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.
 - 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.

1. Enter search filters and display options.
2. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. Select an opportunity by clicking the opportunity link.
 - The Opportunity Detail page opens.
5. Click the **Contacts** link.
6. In the Contacts table, enter new information into the blank fields.
7. Click **Update** to save the information.

Note: Phone book and Email Addressbook are associated with the relationship, not the person.

5.13 Notes (Opportunity)

In order to provide better support and service to your customers, you can enter comments into a free form text field that you can archive and share with others in your organization. The Notes tab represents a log of information that is stored about the opportunity.

- [Creating Notes for an Opportunity](#)
- [Viewing Notes for an Opportunity](#)

5.13.1 Creating Notes for an Opportunity

Prerequisites

None

Steps

Follow these steps to create a note:

1. From the **Opportunity** tab, choose an opportunity by:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.

3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 - The **Opportunity Detail** page opens.
 1. Click the **Notes** link.
 2. Select a Type from the drop down list.
 - You can change the default type using Profiles.
 - Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
 1. Enter your notes in the Text box.
 2. Click **Create**.
- Note:** You cannot edit notes once they are created.

5.13.2 Viewing Notes for an Opportunity

Prerequisites

A note must exist. See [Creating a Note](#).

Steps

Follow these steps to view a note:

1. From the **Opportunity** tab, choose an opportunity by:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.

3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Select the opportunity by clicking the opportunity link.
 - The **Opportunity Detail** page opens.
 1. Click the **Notes** link.
 2. Select a Type from the drop down list.
 - The default type can be changed using Profiles.
 3. Choose the number of days for which you want the notes history.
 4. Click **Apply**.
 5. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
 6. To view all notes in a printer-friendly format, click **All Notes**.

Note: Your profile set up determines the number of rows that will display in your notes table. If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

5.14 Sales Teams (Opportunity)

Sales teams represent all of the salespeople and partners that have ownership of an opportunity. Sales team members can have full access or non-full access (view only) ownership. When a salesperson creates an opportunity, he/she is automatically added to the sales team for that opportunity.

- [Adding a Sales Team Member](#)
- [Adding a Partner](#)
- [Adding a Resource Team to a Sales Team](#)
- [Removing a Sales Team Member](#)

5.14.1 Adding a Sales Team Member

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Opportunity** tab, choose an opportunity by:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Select the opportunity by clicking the opportunity link.
 - The **Opportunity Detail** page opens.
 1. Click the **Sales Team** link.
 2. Enter the last name or partial name of the sales representative in the “**Add a Salesperson**” field, click **Go**.
 3. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.
 4. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
 5. Enter the territory properties, and click **Go**.
 6. Select a Role from the drop down list.

7. You can view the email address and phone number for this salesperson.
8. Click **Update**.

5.14.2 Adding a Partner

Prerequisites

None

Steps

If you want to add a partner to the sales team:

1. From the Opportunity tab, search for an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Optionally enter a Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The Opportunity Detail main page opens.
 1. Click the **Sales Team** link.
 2. Enter the partner name in the “Add a Partner” field, click **Go**.
 3. Select a partner from the search results page by clicking the link.
 4. Click **Update**.

You can choose only from a list of partners whose organizations are specifically defined as a “sales” partner. Refer to the *Oracle Partners Online Users Guide* for more detailed information.

5.14.3 Adding a Resource Team to a Sales Team

Prerequisites

None

Steps

To add a resource team to a sales team, follow these steps:

1. From the Opportunity tab, select an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Optionally enter a Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The Opportunity Detail page opens.
 1. Click the **Sales Team** link.
 2. In the Add a Resource field, enter the resource name or the wildcard and click **Go**.
 3. Select a resource from the search results page by clicking the link.
 4. Click **Update**.

- Each member of the resource team will be added to the sales team table.

5.14.4 Removing a Sales Team Member

Prerequisites

None

Steps

Follow these steps to remove a sales team member:

1. From the **Opportunity** tab, select an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 1. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 2. Click the **Sales Team** link.
 3. Locate the salesperson on the summary table and select the Remove check box.
 4. Click **Update**.

5.15 Tasks (Opportunity)

Tasks provide a way of tracking current and future opportunity activities by providing a list of action items for a specific date range, as well as maintaining a

history of activities. You can create tasks for yourself, assign tasks to others in your organization, and associate tasks with specific opportunities or people.

- [Creating a Task](#)
- [Adding an Attachment to a Task](#)
- [Maintaining a Task](#)

5.15.1 Creating a Task

Prerequisites

None

Steps

Follow these steps to create a task:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 1. Click the **Tasks** link.
 2. Click **Create**.
 3. Select **Task Type** from the drop down list.

4. If the task is a private task, select the “**Private**” box. You can assign this task to yourself only.
5. Enter the **Task Name**.
6. Enter the **Task Description**.
7. Choose the **Priority** from the drop down list.
8. Select the **Status** from the drop down list.
9. Select a planned start date by clicking the Calendar icon and selecting a date.
10. Optionally, select a planned start time and end time by selecting from the drop down lists.
11. Enter the name of the person you are assigning to the task; click **Go**.
12. The “**Relate to**” field is defaulted to the opportunity with which you are working, however, you can edit this field.
13. Click **Create**.
 - When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

5.15.2 Adding an Attachment to a Task

Prerequisites

A task must exist. See [Creating a Task](#).

Steps

Follow these steps to add an attachment to your task:

1. Click the **Attachments** link.
2. Click **Add**.
 - The **Add Attachment** page opens.
1. Enter a description, and choose a **Text**, **File**, or **URL** attachment.
2. On your desktop, click **Browse** to search for a file to attach.
3. Click **Create**.

5.15.3 Maintaining a Task

Prerequisites

A task must exist. See [Creating a Task](#).

Steps

Follow these steps to maintain a task:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 5. Click the Tasks link.
 6. Add or update information.
 7. Click **Update**.

5.16 Adding a Classification (Opportunity)

You can classify opportunities into categories that have been defined by your system administrator. Opportunity Classification is often used for territory assignment and reporting.

Prerequisites

None

Steps

Follow these steps to add a classification:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The Opportunity Detail page opens.
 5. Select the **Classification** link.
 6. Select a Classification from the drop down list that best describes your opportunity.
 7. Optionally, enter comments.
 8. Click **Update** to save.
 - To remove a classification, click the remove icon, and click **Update**.

5.17 Adding an Existing Competitor (Opportunity)

You can add information about the competitors that you are facing with this opportunity. By definition, competitors are organizations that have a competitive relationship with an internal organization.

Please note, once you have selected the Competitor check box, the competitor is added to the competitor table. Even if you remove your selection of the check box, the competitor will remain in the competitor table.

Prerequisites

None

Steps

Follow these steps to add an existing competitor:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 5. The Opportunity Detail page opens.
 6. Select the **Competitors** link.
 7. Use Add a Competitor to search for a competitor, click **Go**.
 - See the next section for steps about how to [create a new competitor](#).
 8. Select from the list.
 9. Optionally, enter comments.
 10. Click **Update** to save.
 - To remove a competitor, click the Remove icon, and click **Update**.

5.18 Creating a New Competitor (Opportunity)

Prerequisites

None

Steps

To create a new competitor, follow these steps:

1. From the Opportunity tab, create the internal organization, if one does not already exist.
 - Go to the Customers tab and create your company as an organization. Refer to the [Creating a New Organization](#) section for step-by-step instructions. The required fields are Organization name and Address Line 1.
 - Note: Remember to select the **Internal** radio button, on the Opportunity Detail page, to indicate that it is an internal organization.
2. Next, create the competitor as an organization.
 - Go to the Customers tab and create an organization which will be the competitor.
3. Once you have created the internal organization and the competitor organization, create the relationship between the competitor and the internal organization by following these steps:
 - Click the competitor organization's link to get to the details page.
 1. Click the Relationships link.
 2. In the Add an Organization field, enter the name or partial name of the organization for which you are creating the relationship and click Go.
 3. Select the organization from the Search Results page by clicking the link.
 4. From the Relationship drop down list, select "Competitor of".
 5. Click **Update**.

5.19 Attachments (Opportunity)

Attachments are defined as physical documents, URLs, or text. The typical use of attachments is for sharing and storing information about a person, organization, relationship, forecast, task, or opportunity. For example, you can attach written correspondence with a particular organization contact to that contact's record.

- [Adding an Attachment](#)
- [Viewing an Existing Attachment](#)

5.19.1 Adding an Attachment

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 1. Click the **Attachments** link.
 2. Click **Add**.
 - The **Add Attachment** page opens.
 3. Enter a description, and click **Text**, **File**, or **URL**.
 4. Enter Text, click Browse to search for the document, or enter the URL.

5. Click **Create**.

5.19.2 Viewing an Existing Attachment

To view an existing attachment, click the attachment link.

5.20 Opportunity Matching

There are several ways to generate a Partner list for Opportunity Matching. Use the appropriate general criteria selected at setup. Supplement those by manually creating and narrowing specific attributes and ranking them.

Oracle Partners Online's Partner matching engine will create a recommended Partner list for the specific opportunity. This list matches the details of the opportunity with the details on all of the Sales Partner's profiles. If a Partner matches more attributes than another Partner, it will automatically rank higher on the recommended Partner list.

Use this procedure to match an Opportunity to a Partner.

Prerequisites

Log in as Vendor or Partner User/Administrator and navigate to the following:

Opportunity > Opportunity Main Summary Subtab > Opportunity Details-Main Link > Channel Partners Link

Steps

1. Click opportunity with "unassigned status".
2. Set the sales channel to 'Indirect'.
3. Click 'Match Partners' using the recommended Partner Matching Engine.
4. View the recommended Partner list.
5. If you want to manually add Partners to this list, you can perform a manual search.
6. Access the Manual Matching page to search for specific attributes, for example, Vendor certification or Customer support capability. Enter your search criteria and click Search.
7. To add Partners to the matching list, from the search results, check off the desired Partners names and click Add to Partner Assignment List.

8. You can manually change any of the ranking associated with the Partners on the list.
9. When you have derived a satisfactory list, select the Partner assignment/routing method.
10. The routing method determines how the Opportunity is offered to Partners on the list:
 - **Single:** The Opportunity goes to the Partner ranked “1” only.
 - **Serial:** The Opportunity goes to the Partner ranked “1” first. If he/she rejects the opportunity, it goes to the next Partner on the list.
 - **Broadcast:** The Opportunity is offered to all Partners on a first come first server basis. Only one Partner can work on an opportunity at a time.
 - **Joint Selling:** The opportunity is offered to all Partners. Multiple Partners can accept the opportunity and work jointly on that opportunity.

5.21 Assign an Opportunity

Use this procedure to Assign an Opportunity.

Prerequisites

Log in as an Vendor User/Administrator and navigate to the following:

Opportunity > Opportunity Main Summary Subtab

Steps

1. Click an unassigned Opportunity.
2. See the steps for creating additional Opportunity detail.
3. When you have generated a list that satisfactorily matches Partners with Opportunities, select an assignment option.
4. Click Submit Assignment to start the Workflow routing and notifications to the Channel Managers of the Partners on the final Partner list.
 - While an Opportunity is being offered to Partners, the Vendor User can monitor the status of each Opportunity as involved parties (Vendor or Partner User) shepherd them toward closure.

5.22 Accepting/Declining an Offered Opportunity

Use this procedure to accept/decline an Offered Opportunity.

Prerequisites

Log in as Partner or VAD User/Administrator and navigate to the following:

**Opportunity >View By “Offered” in the Opportunity Summary Subtab
>Opportunity Detail- Main Link**

Steps

1. View specific details associated with your offered opportunity: business overview of Customer and Partner, project, total budget, win probability, vendor purchase items and amount, additional channel offering.
2. Click **Partner** link in the side menu
3. Click **Accept** or **Decline**.
 - The page refreshes and becomes update able if the offered opportunity is accepted.

5.23 Updating an Active Opportunity

After a Partner accepts an offered Opportunity, the Opportunity page refreshes and allows the Partner to update the Opportunity.

Use this procedure to Update an Opportunity.

Prerequisites

Partner accepts an Opportunity. Log in as Partner or VAD User, navigate to the following and update information where appropriate.

Opportunity > Opportunity Summary Subtab > Update Opportunity Link

Steps

1. Fill in the project name.
2. Fill in the total budget.
3. Fill in Vendor purchase items or supply new amounts where appropriate.

5.24 Managing Addresses

You can manage the addresses for opportunities, organizations, and people by following the steps below.

- [Creating a New Address](#)
- [Editing Address Details](#)
- [Viewing Address History](#)

5.24.1 Creating a New Address

Prerequisites

None

Steps

Follow these steps to create a new address:

1. Search for the opportunity, organization, or person for which you want to create a new address.
2. Click the opportunity, organization, or person's link to view details.
3. Click the **Create Address** button in the Addresses section.
4. Enter the information required.
5. Click OK.

5.24.2 Editing Address Details

Prerequisites

An address must exist.

Steps

Follow these steps to edit address details:

1. Search for the opportunity, organization, or person for which you want to edit address details.
2. Click the opportunity, organization, or person's link.
3. Click the address link to display address details.

4. Edit and update information.
5. Click **Update** to save changes.

5.24.3 Viewing Address History

Prerequisites

An address must exist.

Steps

Follow these steps to view address history:

1. Search for the opportunity, organization, or person for which you want to edit address details.
2. Click the opportunity, organization, or person's link.
3. Click the **History** button in the Addresses section.
4. Click **Back** to return to the previous page.

5.25 Opportunity Reports

You can view any of the following Opportunity Reports from the Organization tab, under the Reports subtab.

- [Viewing Opportunity Summary Report](#)
- [Viewing Opportunity Summary Report by Group](#)
- [Viewing Opportunity Detail Report](#)
- [Viewing Opportunity Exchange Report](#)
- [Viewing Opportunity Access Report](#)

To download any of the opportunity reports into a comma separated values file, click the **Download** button.

5.25.1 Viewing Opportunity Summary Report

This report provides a detailed list of opportunities with amounts for each product category.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Summary report:

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Summary Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.
 - To move all available columns into the display columns section click the >> button.
6. In the Save Report As section, you can save the report under a different report name. Additionally, select the “Always run with current period” or “Always run with indicated period” radio buttons to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.

5.25.2 Viewing Opportunity Summary Report by Group

This report provides a summary of all opportunities by the sales group.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Summary Report by Group:

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Summary Report by Group** link.
4. Select the filter options to fit your needs.

5. Select the display options.
6. In the Save Report As section, you can save the report under a different report name. Additionally, select the “Always run with current period” or “Always run with indicated period” radio buttons to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.
 - To download the report, click the **Download** button.

5.25.3 Viewing Opportunity Detail Report

This report provides a detailed listing of the selected opportunities.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Detail report:

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Detail Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.
 - To move all available columns into the display columns section click the >> button.
6. In the “Save Report As” section, you can save the report under a different report name. Additionally, select the “Always run with current period” or “Always run with indicated period” radio buttons to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.

5.25.4 Viewing Opportunity Exchange Report

The opportunity exchange report provides a list of errors generated in the process of exchanging opportunities with partners.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Exchange report:

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Exchange Report** link.
4. Enter the Opportunity Name.
5. Enter the Customer Name.
6. Select the Exchanged with Partner from the list of values.
7. Select the Exchanged Date Range From and To by clicking the calendar icon and choosing a date.
8. Select the Exchange Direction from the list of values.
9. Click **Go**.

5.25.5 Viewing Opportunity Access Report

This report provides a list of opportunities based on a manager and his or her subordinates. Please note, although the access report can be run by any sales team member, it will display only sales team members who have sales credits. Additionally, the report contains partner information for the opportunity.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Access report:

1. Click the **Opportunity** tab.

2. Click the **Reports** subtab.
3. Click the **Opportunity Access Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.
 - To move all available columns into the display columns section click the >> button.
6. In the Save Report As section, you can save the report under a different report name. Additionally, select the “Always run with current period” or “Always run with indicated period” radio buttons to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report at the same time, click **Save and Run Report**.
10. Select “Use as Report Default” check box to use the report as a default.

5.26 Viewing My Reports and Charts

My Reports list the reports you have saved using the Personalize functionality. When you enter specific filters, display options, sort options, and enter a name for the search, you can save the report with a new name.

You can view the following charts:

- [Viewing Opportunity Chart by Close Date](#)
- [Viewing Opportunity Chart by Status](#)
- [Viewing Opportunity Chart by Win Probability](#)

5.26.1 Viewing Opportunity Chart by Close Date

Prerequisites

None

Steps

To view opportunity chart by close date, follow these steps:

1. From the **Opportunity** tab, click the **Reports** subtab.
2. In the Charts section, select the Opportunity Chart by Close Date from the drop down list.
3. Select the chart style from the drop down list.
4. Select the chart dimension from the drop down list.
5. Select the period type from the drop down list.
6. Select the start and end periods from the drop down lists.
7. Select the chart number from the drop down list.
8. Click **Run** to see the chart.

5.26.2 Viewing Opportunity Chart by Status

Prerequisites

None

Steps

To view opportunity chart by status, follow these steps:

1. From the **Opportunity** tab, click the **Reports** subtab.
2. In the Charts section, select the Opportunity Chart by Status from the drop down list.
3. Select the chart style from the drop down list.
4. Select the chart dimension from the drop down list.
5. Select the period type from the drop down list.
6. Select the start and end periods from the drop down lists.
7. Select the chart number from the drop down list.
8. Click **Run** to see the chart.

5.26.3 Viewing Opportunity Chart by Win Probability

Prerequisites

None

Steps

To view opportunity chart by win probability, follow these steps:

1. From the **Opportunity** tab, click the **Reports** subtab.
2. In the Charts section, select the Opportunity Chart by Win Probability from the drop down list.
3. Select the chart style from the drop down list.
4. Select the chart dimension from the drop down list.
5. Select the period type from the drop down list.
6. Select the start and end periods from the drop down lists.
7. Select the chart number from the drop down list.
8. Click **Run** to see the chart.

6.1 Forecast Tab

The Forecast tab consists of five subtabs: Forecast, Opportunity, Product Category, Generate Forecasts, and Reports.

Forecasting is a quantitative tool used to predict the amount of sales for a specified time period. Forecasting can be used by managers and salespeople to commit to the amount of sales that they will close by the end of the forecasting period.

The following tasks can be performed from the Forecast subtabs:

- [Creating and Submitting Forecasts](#)
- [Automatically Submitting Worksheets](#)
- [Viewing Forecast History](#)
- [Adding an Attachment \(Forecast\)](#)
- [Adding a Note \(Forecast\)](#)
- [Linking to Compensation](#)
- [Opportunity Worksheet](#)
- [Product Category Worksheet](#)
- [Viewing Product Category History](#)
- [Viewing Opportunity History](#)
- [Generate Forecast](#)
- [Forecast Reports](#)

Forecasting is performed at two levels; product category and opportunity. The following table describes how the forecasting levels work.

Table 6–1 Forecasting Levels

Level	How it works
Product Category	Forecasting at the Product Category level provides salespeople with an easy way to forecast their sales at the product level by rolling up opportunity lines into product groupings. From the summary page, Pipeline value links take you to the Forecast Summary by Product Category report.
Opportunity	Forecasting at the Opportunity level provides a tool for salespeople to create their own view and commitment of the opportunities that they or their sales representatives are working on. At this level, a manager can review, adjust, and commit to the numbers used in forecasting at the opportunity level.

Based on the role of the user, there are two viewing options; Salesperson View and Manager View. The following table describes how the Salesperson and Manager Views work in Oracle Partners Online.

Table 6–2 Forecasting Views

View	How it works
Salesperson View (you are a salesperson; you do not manage other sales people)	<p>Weighted Pipeline=Opportunity Amount multiplied by the Win Probability</p> <p>Pipeline=Total Forecastable Opportunity Amounts</p> <p>Won to Date=Sum of Opportunity Amount where the status equals won.</p> <p>Click the pipeline amount link to verify the opportunities included in your pipeline. This will show you a list of all forecastable opportunities with a close date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities.</p> <p>If you have submitted previous forecasts, the last submitted values will appear in the forecast values.</p> <p>The forecast main page will show your saved opportunity and product category worksheets (if any exist) as links. See the section on Creating Product Level Forecasts Using Product Category Worksheets and Creating Opportunity Level Forecasts Using Opportunity Worksheets for more information.</p> <p>Grand totals of last saved worksheet values appear along side the links.</p> <p>You can accept default values or update values the amounts you want to commit to, but you must submit your forecasts in order for your manager to be able to view them.</p>

Table 6–2 Forecasting Views

View	How it works
<p>Manager View (you manage one or more groups; and the forecast you submit represents the group forecast)</p>	<p>Weighted Pipeline=Opportunity Amount multiplied by the Win Probability</p> <p>Pipeline=Total Forecastable Opportunity Amounts</p> <p>Won to Date=Sum of Opportunity Amount where the status equals won.</p> <p>The Manager View is located below the Salesperson View in the Forecast Summary page. Your subordinates (groups or individuals) forecasts are in the Subordinates section. You can view group details by clicking the group link; additionally, if you continue to drill down you will eventually reach the bottom of the sales hierarchy. You can view subordinate’s forecast details by clicking the subordinate’s name link.</p> <p>Forecasting is divided into several sections:</p> <p>Current Pipeline Values: if set to yes in your Forecasting profile preferences, will show you the dynamic amounts available in the subordinates current pipeline</p> <p>Submitted Pipeline Values: display the values of the pipeline at the time that the subordinate last submitted their forecasts</p> <p>Submitted Forecast Values: displays the forecast amounts that the salesperson or group has most recently committed to for the forecast period. If no forecasts have been submitted for the period, the Submitted Forecasts Values section will be blank.</p> <p>Submitted Date, Attachments, and Notes from the subordinates are displayed, if available</p> <p>When you forecast for the first time you will see current pipeline values. Pipeline values will reflect only opportunities that are forecastable and are set up by the system administrator. Additionally, the default forecast values are based on your Forecasting profile set up, under the Default New Rows in Worksheet where the options are zero and pipeline.</p> <p>To verify the opportunities included in a pipeline, click the Pipeline link. This displays a list of all forecastable opportunities with a close date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities.</p> <p>If you have submitted previous forecasts, the last submitted values will appear in the forecast values.</p> <p>Grand totals of last saved worksheet values appear along side the links.</p>

Note: Forecasting numbers are rounded down to the nearest whole dollar.

6.2 Creating and Submitting Forecasts

Prerequisites

In general, you will create a forecast after you have created either a product category worksheet and/or an opportunity worksheet, and reviewed your subordinates forecasts and submitted worksheets.

Steps

Follow these steps to create and submit Forecasts:

1. From the **Forecast** tab, click the **Forecast** subtab.
2. Select the Sales Group for which you want to forecast, from the drop down list. If you work in multiple groups, you must submit multiple forecasts; one per group.
3. Select the **Period Type** and **Period Name** from the drop down lists.
4. Choose the **Forecast Category** from the drop down list.
 - The Forecast Category is a grouping of product categories for which you want to forecast.
5. Click **Apply**.

Note: Your forecast currency is displayed. To change the forecast currency, go to the Profiles icon, select the Forecasting link.
6. Update Worst Case, Forecast, and Best Case with the amounts that you want to submit to management and click the **Submit Forecast and Worksheets** button.

6.3 Automatically Submitting Worksheets

Sales Managers and Sales Representatives can automatically submit worksheets by setting the profile option “Auto Submit Forecast Worksheets” to None, Opportunity, Product Category, or Both. In accordance with your profile preferences for “Auto Submit Worksheets” and “Default Worksheets Values” you will submit worksheets according to preferences outlined in the table below. For instance, if you have saved a worksheet and you have turned on the Auto Submit feature then your saved worksheet will not be submitted, in place of your saved worksheet, Oracle Partners Online will submit a worksheet based on the “Default Worksheets Values” you have selected.

The option which is currently selected is displayed on the Forecast Main page.

Prerequisites

You must set profile preferences. See [Setting Forecasting Preferences](#).

Steps

Follow these steps to set up automatic submission of worksheets:

1. From any page in Oracle Partners Online, click the **Profile** icon in the upper right of the page.
2. Under Oracle Partners Online Preferences, click the **Forecasting** link.
3. From the Auto submit Worksheet drop down list, select your preference.
4. Click **Update**.

The following table describes the Auto Submit Profiles.

Table 6–3 Auto Submit Profiles

Auto Submit Worksheets Profile	Default Worksheet Values Profile	How it works
None	N/A	The main forecast is submitted. Any previously saved worksheets are submitted with the main forecast.
Opportunity	0	The main forecast is submitted. The opportunity worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Opportunity	Pipeline	The main forecast is submitted. The opportunity worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.
Product Category	0	The main forecast is submitted. The product category worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Product Category	Pipeline	The main forecast is submitted. The product category worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.

Table 6–3 Auto Submit Profiles

Auto Submit Worksheets Profile	Default Worksheet Values Profile	How it works
Both	0	The main forecast is submitted. The opportunity and product category worksheets are submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Both	Pipeline	The main forecast is submitted. The opportunity and product category worksheets are submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.

6.4 Viewing Forecast History

The Forecast History shows you a list of all previously submitted forecasts for a period.

Prerequisite

You can view forecast history after they have been saved AND submitted. If you save a forecast without submitting the forecast, you cannot view it within the forecast history.

Steps

Follow these steps to view forecast history:

1. From the **Forecast** tab, click the **Forecast History link**.
 - The **Forecast History** page opens.
2. You can click the Opportunity or Product Category Worksheet link to view either worksheet.

6.5 Adding an Attachment (Forecast)

Use this feature to provide relevant backup information to your manager about your forecast numbers.

Prerequisite

A forecast must already exist.

Steps

You can add an attachment to an existing forecast by following these steps:

1. From the **Forecast** tab, make sure you are on the Forecast subtab.
2. Select an existing forecast.
3. Click the Attachments link.
4. Click **Add**.
 - The Add Attachment page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.
 - Attachments are submitted to management along with your forecast numbers and can be viewed by your manager in the subordinate section of the main forecast page.

6.6 Adding a Note (Forecast)

Use this feature to share information with your manager regarding your forecast numbers.

Prerequisites

A forecast must already exist.

Steps

Follow these steps to add a note:

1. From the **Forecast** tab, click the **Notes** icon.
 - The Forecast-Notes page opens.
1. Select a Type from the drop down list.
 - You can change the default type by changing the forecast profile preferences.
1. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
2. Enter your notes in the text box.
3. Click **Create**

- Forecast Notes are submitted to management along with forecast numbers.

Note: You cannot edit notes once they are created.

6.7 Linking to Compensation

From the Forecast tab, you can view a year-to-date earnings report of your subordinates.

Steps

1. Click the Compensation icon in the last column of Subordinates Forecast section.
2. The Year-to-Date Earnings Summary page opens.

Note: Oracle Incentive Compensation must be installed to use this feature. Please refer to the *Oracle Incentive Compensation Concepts and Procedures* guide for more information.

6.8 Opportunity Worksheet

Opportunity Level Forecasting provides a tool for salespeople to create their own view, and commitment, of the opportunities their salespeople are working with. Opportunity forecasting also gives salespeople the ability to review, adjust, and commit to the number submitted in forecasting at the Product Category level.

- [Creating Opportunity Level Forecasts Using Opportunity Worksheets](#)

6.8.1 Creating Opportunity Level Forecasts Using Opportunity Worksheets

Prerequisites

None

Steps

Follow these steps to create opportunity worksheets:

1. From the **Forecast** tab, click the **Opportunity** subtab.
 - The **Opportunity Worksheet** page opens.
2. From the drop down list select the **Sales Group** for which you want to forecast.
3. Select the **Period Type** and **Period Name** from the drop down lists.

4. Select the Forecast Category from the drop down list.
5. From the “**Create Worksheet Using**” radio buttons, select one of the following options:
 - **Previously Saved Values (default):** If you are forecasting for the first time, the value is based on the Oracle Partners Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.
 - **Pipeline Default Amounts:** This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.
 - If you have set up the Forecast profile, Default New Rows in Worksheet equal to Pipeline and status of opportunity equal to Won; then the Worst case, Forecast, and Best case amounts are all defaulted to the Opportunity amount.
 - Pipeline defaults use the following criteria:
 - **Worst Case:** Total Won Amount=Sum of all won opportunities
 - **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
 - **Best Case:** Total sum of all forecastable opportunities
 - **Subordinate Submitted Values:** This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.
 - Please note, only managers are allowed to create worksheets using subordinate submitted values.
6. Click **Apply**.
 - The page is refreshed with all the opportunities within your pipeline which are forecastable.
 - The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.
 - You can adjust the amounts in these fields to reflect your sales commitment.
7. Click **Save**.
 - The forecast will not be submitted by saving the worksheet, you must click the Submit Forecast and Worksheets button in the Forecast Main page.

6.9 Product Category Worksheet

Forecasting at the Product Category Level gives salespeople a way to view their pipeline aggregated into product categories. This allows salespeople to generate product level forecasts without having to go down to the opportunity level details.

- [Creating Product Level Forecasts Using Product Category Worksheets](#)

6.9.1 Creating Product Level Forecasts Using Product Category Worksheets

Prerequisites

None

Steps

Follow these steps to create product level forecasts using product category worksheets:

1. From the **Forecast** tab, click the **Product Category** subtab.
 - The **Product Category Worksheet** page opens.
2. From the drop down list select the **Sales Group** for which you want to forecast.
3. Select the **Period Type** and **Period Name** from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. From the **Create Worksheet Using** radio buttons, select one of the following options:
 - **Previously Saved Values (default):** If you are forecasting for the first time, the value is based on the Oracle Partners Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.
 - **Pipeline Default Amounts:** This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.
 - Pipeline defaults use the following criteria:
 - **Worst Case:** Total Won Amount=Sum of all won opportunities
 - **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
 - **Best Case:** Total sum of all open opportunities

- **Subordinate Submitted Values:** This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.
- Please note, only managers are allowed to create worksheets using subordinate submitted values
- 6. Click **Apply**.
 - The page is refreshed with all the opportunities within your pipeline which are forecastable.
 - The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.
 - You can adjust the amounts in these fields to reflect your sales commitment.
- 7. Click **Save**.
 - The forecast will not be submitted by saving the worksheet, you must click the Submit button.

6.10 Viewing Product Category History

Prerequisites

Previous product category forecasts must have been submitted.

Steps

You can view the Product Category Worksheet History by following these steps:

1. From the **Forecast tab**, click the **Product Category** subtab.
2. Click **Product Category Worksheet**.
3. Click the **History** button, to view the history of all previous forecast submissions for this product category.
 - Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted.

6.11 Viewing Opportunity History

Prerequisites

Previous opportunity forecasts must have been submitted.

Steps

You can view the Opportunity Worksheet History by following these steps:

1. From the **Forecast** tab, click the **Opportunity** subtab.
2. Click **Opportunity Worksheet**.
3. Click the **History** button, to view the history of all previous forecast submissions for this opportunity for all periods, groups, and roles, in descending submitted date.

6.12 Generate Forecast

Under the Forecast tab, you will find the Generate Forecast subtab. Sales representatives can generate forecasts for multiple periods from this page.

Please note, sales managers cannot generate forecasts. If a person is logged in as a sales manager and attempts to generate a forecast for multiple periods, they will receive the following error message “You do not have access to generate forecast.”

The number of months for which the sales rep can generate forecast in a single process is determined by the profile OSO: Forecast Max Generate Months. The default is six months.

Prerequisites

Set up profile OSO: Forecast Max Generate Months. See the *Oracle Partners Online Implementation Guide*, profiles chapter.

Steps

Follow these steps to generate a forecast:

1. From the Sales Group section, select a sales group from the drop down list.
2. From the Forecast section, select the Period Type from the drop down list.
3. Select the “From Period” and “To Period” from the drop down lists.
4. Select the Forecast Category from the drop down list.

5. Click **View**.
 - Displays the values that will be generated for your forecast.
6. Select all periods for which you want to generate forecasts by selecting the check box.
7. Click **Submit**.
8. Click the period's link to view the forecast.

6.13 Forecast Reports

From the Forecast tab, you can view several reports by clicking the Reports subtab. The Forecast Reports subtab is divided into three sections; Forecast Reports, My Reports, and Charts. The Forecast Reports section includes all the seeded reports. In My Reports, you can create your own report criteria and save the search with a report name. These reports will appear in My Reports.

- [Creating a Forecast Report](#)
- [Viewing Forecast Summary by Product Category](#)
- [Viewing Forecast Accuracy Report](#)
- [Viewing Forecast Progression Report](#)
- [Viewing Forecast Comparison Report](#)
- [Viewing Forecast History Report](#)
- [Viewing Forecast to Pipeline Summary Report](#)
- [Viewing Forecast to Pipeline Trends Report](#)
- [Viewing Forecast History \(Self\) Chart](#)
- [Viewing Forecast History \(Subordinates\) Chart](#)

6.13.1 Creating a Forecast Report

Prerequisites

None

Steps

Follow these steps to create a forecast report:

1. From the **Forecast** tab, click the **Personalize** button.
2. Select search filters.
3. Select display options.
4. Select sort options.
5. Enter a report name.
6. Save and run the report.

6.13.2 Viewing Forecast Summary by Product Category

The Forecast Summary Report by Product Category shows a detailed list of all opportunities which are included in forecasting based on the forecast date at the opportunity line instead of the close date at the opportunity header level. Please note, the opportunity close date will appear on the report as part of the opportunity header information, not the line level forecast date.

Prerequisites

None

Steps

Follow these steps to view the Forecast Summary Report by Product Category:

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Summary Report by Product Category** link.
 - The Create Forecast Summary by Product Category Report page opens.
 - Under the Filters section you can select from any of the following filters.
 1. Select the Period Type from the drop down list.
 2. Select the Period for which you want to run the report.
 - The Credit Type is set to Forecast Credits.
 3. Select a Business Line from the list of values.
 4. Select a Status from the list of values.
 5. Select a Channel from the list of values.
6. Enter an Opportunity Name.
7. Enter a Salesperson full or partial name and click **Go**.

8. Enter a Partner full or partial name and click **Go**.
9. Select the Product Category from the list of values.
10. Select a Sales Stage from the list of values.
11. Select a Win Probability from the drop down list.
12. Enter a project name.
 - Under the Display Options, you can select from the following choices:
 1. Select a Reporting Currency from the drop down list.
 2. Select a Product Category by selecting the radio button.
 3. Select a Threshold Amount.
 4. Select a Worksheet Type from the drop down list.
 5. Select the "Exclude deals where all forecast amounts are 0.00" if you want to exclude those items.
 6. Add Displayed Columns from the Available Columns by using the > button. To remove Displayed Columns use the < button. If you want to add all the Available Columns to the Displayed Columns area use >> button.
 7. Select your preference from the "Columns will be scaled as" drop down list.
 8. Choose the Sort Rows by, Then by, Finally by options from each drop down list.
 9. In the Save Report section, you can **Save the report**, **Save and Run the report**, or **Run the report** by clicking the respective button.

6.13.3 Viewing Forecast Accuracy Report

Prerequisites

None

Steps

Follow these steps to view the Forecast Accuracy report:

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Accuracy** report link.
3. Select your search filters.

4. Select your display options.
5. Click **Save**.
 - You can save the report by entering a report name and clicking the Save button.
6. Run the report by clicking **Run Report**.
7. To display the report on your home page, select the “Display on Homepage” check box.
8. To download the report, click **Download Report**.

6.13.4 Viewing Forecast Progression Report

Prerequisites

None

Steps

Follow these steps to view the Forecast Accuracy report:

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Progression** report link.
3. Select your search filters.
4. Select your display options.
5. Click **Save**.
 - You can save the report by entering a report name and clicking the Save button.
6. Run the report by clicking **Run Report**.
7. To display the report on your home page, select the “Display on Homepage” check box.
8. Click **Download Report**.

6.13.5 Viewing Forecast Comparison Report

This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet.

Prerequisites

None

Steps

Follow these steps to view the Forecast Comparison Report:

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Comparison Report** link.
3. Select Forecast 1 filters.
4. Select Forecast 2 filters
5. Select Display Options.
6. Select Reporting Currency and Scaling.
7. Enter a Report Name.
8. Click **Save**.
9. If you want to display the report on your home page, select the check box.

6.13.6 Viewing Forecast History Report

This report shows submitted pipeline and forecast values for the salespeople selected. A link is available to view the submitted opportunity or product category worksheet. Please note, you cannot view a Forecast History Report for another manager, only sales reps' reports are available for viewing.

Prerequisites

None

Steps

Follow these steps to view the Forecast History Report:

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast History Report** link.
3. Select the Period Type from the drop down list.
4. Select the Sales Group from the drop down list.
5. Before selecting the "Period" from the drop down list, select "To" from the drop down list.

6. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking **Go**.
7. Enter a Report Name.
8. Select from the radio buttons, Always run using current period or Always run using indicated period.
9. Select the Display on Home Page button to display the report on your home page.
10. Click **Run Report** to run the report.
11. Click **Download Report**, to download the report to a spreadsheet application.
 - Please note, the currency shown at the top of the Forecast History Report page may not reflect the currency you have chosen through your selection criteria.

6.13.7 Viewing Forecast to Pipeline Summary Report

Prerequisites

None

Steps

To view the Forecast to Pipeline Summary report, follow these steps.

1. From the **Forecast** tab, select the **Reports** subtab.
2. Click the **Forecast to Pipeline Summary** report link.
 - The Forecast to Pipeline Summary page opens.
3. Select filters and display options.
4. If you want to save the report, enter a report name.
5. Select “Always run using current period” or “Always run using indicated period” by selecting the radio button.
6. Select the “Display on Homepage” check box to display the report on your home page.
7. Click **Run Report**.
8. Click **Download Report**, to download the report to a spreadsheet application.

6.13.8 Viewing Forecast to Pipeline Trends Report

To view the Forecast to Pipeline Trends report, click the report link. You can download the report by clicking **Download Report**.

- [Viewing Forecast History \(Self\) Chart](#)

6.13.9 Viewing Forecast History (Self) Chart

Prerequisites

A forecast history must exist.

Steps

To view forecast history (self) charts, follow these steps:

1. From the **Forecast** tab, click the **Reports** subtab.
2. In the Charts section, select Forecast History (self) from the drop down list.
3. Select the chart style from the drop down list.
4. Select the chart dimension from the drop down list.
5. Select the period type from the drop down list.
6. Select the start and end periods from the drop down lists.
7. Select the chart number from the drop down list.
8. Click **Run**.

6.13.10 Viewing Forecast History (Subordinates) Chart

Prerequisites

A subordinates forecast history must exist.

Steps

To view forecast history (subordinates) charts, follow these steps:

1. From the **Forecast** tab, click the **Reports** subtab.
2. In the Charts section, select Forecast History (subordinates) from the drop down list.

3. Select the chart style from the drop down list.
4. Select the chart dimension from the drop down list.
5. Select the period type from the drop down list.
6. Select the start and end periods from the drop down lists.
7. Select the chart number from the drop down list.
8. Click **Run**.

Sections in this chapter include:

- [Overview of the Customer Tab](#)
- [Organization Subtab](#)
- [Person Subtab](#)
- [Contacts Subtab](#)
- [Contact List Subtab](#)
- [Customer Reports](#)

7.1 Overview of the Customer Tab

Use the Customer tab to create and maintain Organizations, People, Contacts, and Lists by clicking the related subtab.

By default, the Customer tab opens to the Organization Summary page. From the Customer tab, you can use the following subtabs:

- [Organization Subtab](#)
 - [Personalizing Organization Summary](#)
 - [Creating a New Organization](#)
 - [Maintaining Organization Details](#)
 - [Searching for an Organization](#)
 - [Adding Classifications](#)
 - [Creating and Maintaining Relationships](#)

- Maintaining Lead Details
- Creating Opportunities
- Maintaining Opportunity Details
- Maintaining Quote Details
- Notes
- Sales Teams
- Tasks
- Interactions
- Attachments
- Accounts
- 360 Degree View
- Person Subtab
 - Personalizing Person Summary
 - Creating a Person
 - Table 7.3.4, "Maintaining Person Details"
 - Adding Classifications
 - Searching for a Person
 - Sending Collateral
 - Creating and Maintaining Relationships
 - Leads
 - Creating Opportunities
 - Maintaining Quote Details
 - Notes
 - Sales Teams
 - Tasks
 - Interactions
 - Attachments
 - Accounts

- 360 Degree View
- Contacts Subtab
 - Personalize Contact Summary
 - Creating a Contact
 - Searching for a Contact
 - Maintaining Contact Details
 - Adding Classifications
 - Managing Contact Notes
 - Searching for a Contact
 - Creating a Contact Task
 - Managing Contact Attachments
 - Managing Contact Interactions
 - Sending Collateral from the Contact Summary Table
- Contact List Subtab
 - Creating a Contact List Using Filters
 - Creating a Contact List by Manually Adding Contacts
 - Saving a Contact List
 - Downloading a Contact List
 - Personalizing the Summary Table Display
 - Adding Additional Filters to a Contact List
 - Viewing List Filters
 - Manually Add a Contact to a List
 - Removing a Contact from a List
 - Removing a List
 - Call Sheet Overview
 - Generating a Call Sheet
 - Viewing Call Sheet Details
 - Sorting a Call Sheet

- [Selecting Multiple Contacts](#)
- [Adding a Task](#)
- [Viewing Calendar Tasks](#)
- [Customer Reports](#)
 - [Viewing the Task Classification Report](#)

7.2 Organization Subtab

The Organization main page, "My Organizations (Sales Team)", displays all organizations for which you are on the sales team. You can quickly display your own lists every time you click the Organization subtab by personalizing the organization summary. For instance, you can define your own list of "organizations with over 1,000 employees".

- [Personalizing Organization Summary](#)
- [Creating a New Organization](#)
- [Maintaining Organization Details](#)
- [Searching for an Organization](#)
- [Adding Classifications](#)
- [Creating and Maintaining Relationships](#)
- [Maintaining Lead Details](#)
- [Creating Opportunities](#)
- [Maintaining Opportunity Details](#)
- [Maintaining Quote Details](#)
- [Notes](#)
- [Sales Teams](#)
- [Tasks](#)
- [Interactions](#)
- [Attachments](#)
- [Accounts](#)
- [360 Degree View](#)

7.2.1 Personalizing Organization Summary

Navigation

Customer > Organization

Prerequisites

None

Steps

Follow these steps to personalize the organization summary page:

1. Click **Personalize**.
2. Change, add, or remove parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search**.

Saved Searches appear in a drop down list on the Organization page.

Note: The Advanced Search link and Personalize button take you to the same Organization Search page.

7.2.2 Creating a New Organization

Navigation

Customer > Organization

Prerequisites

None

Related Profiles

Profile options set during implementation govern the way a person is created. The profile option "**OS: Address Required for Organization**" affects the application in the following ways:

- If set to "Yes" then the address is mandatory for creating an organization. It is then required that you go to the "Create Organization" page where you must enter the address while creating the organization. In this case there are no empty rows in the contact table.
- If set to "No" then you can create without the address. You are not required to go to the "Create Organization" page. Instead, you can create a new organization and a contact by entering data in empty rows in the contact table. In this case the "Create Organization" button is not displayed.

Please refer to the *Oracle Sales Online Implementation Guide* for information on setting profile options.

OS: Create Organization Privilege: If set to "Yes", user can create organizations.

Steps

In order to maintain customer data integrity, it is a good business practice to first search the database before creating a new organization.

Follow these steps to create a new organization:

1. Click **Create** or go to [Steps for Quick Create](#).
2. Enter the required information and optional information. See the table below for detailed descriptions of each field.

The following table describes the Create Organization fields.

Table 7–1 Create Organization Fields

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Organization Name Pronunciation	No	You can enter the organization name pronunciation.
Alias	No	Enter an alias, if applicable.
SIC Code Type	Yes	Standard Industry Classification code type.
SIC Code	Yes	Standard Industry Classification code.
DUNS Number	No	Dunn and Bradstreet number.
Tax ID	No	Enter the tax identification code.
Email Addressbook	No	Enter the email address here or click the email address book to select another address.

Table 7-1 Create Organization Fields

Field	Required Field	Description
Customer Category	No	Select customer category from the drop down list.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Web Site Address Book	No	Enter the organization's web site or click the web address book icon to select another party web address to display.
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization. If you want to create relationships between your organization and other external organizations
Alias	No	Enter an organization alias.
Phonebook	No	Click the phonebook link to select another party phone number to display.
Business Line	No	Enter a business line, if applicable.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.

The following table describes fields in the Address section of Create Organization.

Table 7-2 Address Fields

Field	Required Field	Description
Address Type	No	Select an address type from the list of values.
Address Line 1	Yes	Enter the organization address.
Address Line 2	No	Enter additional organization address information.
Address Line 3	No	Enter additional organization address information.
Address Line 4	No	Enter additional organization address information.
County	No	Enter in the county field.
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.

Table 7–2 Address Fields

Field	Required Field	Description
Reason	No	Select a reason for not sending mail.
City	No	Enter in the city field.
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
Country	Yes	Select country from the drop down list.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

If you want to enter person relationships, you can add an existing person by entering the last name in the Add a Person field and clicking **Go**. You can create a relationship with a person, who does not exist in the database yet, by entering the required information directly into the fields. When you click Update, the person is created in the database.

The following table describes fields in the Person Relationship section of Create Organization.

Table 7–3 Person Relationship Fields

Field	Required Field	Description
Add a Person	Yes	If you are going to add a person relationship, enter the full or partial name and click the Go button.
Erase	No	To erase a relationship from the summary table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.
Last Name	Yes	Enter the last name.
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.

Table 7-3 Person Relationship Fields

Field	Required Field	Description
Email Addressbook	No	Select an email address by clicking the email address book icon.
Job Title	No	Enter a job title.
Decision Maker	No	Select the decision maker check box if the person is a decision maker.

The following table describes Organization Relationship fields in Create Organization.

Table 7-4 Organization Relationship Fields

Field	Required Field	Description
Add an Organization	Yes	If you are going to add an organization relationship, enter the full or partial name and click Go .
Erase	No	To erase a relationship from the summary table, click the erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Status	Yes	Indicate the status of the relationship.
Related Organization	Yes	This field holds the name of the related organization.
Start Date	Yes	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

3. After you have completed entering the information, click **Create**.
4. You have successfully created an organization when the Organization Detail Main page opens. The organization number is generated by the system.

Steps for Quick Create

1. Click **Quick Create**.
2. The Quick Create Organization page opens.
3. Enter the name by which the organization will be identified.
4. Optionally, enter the DUNS number. The number associated with Dunn and Bradstreet information.

5. Optionally, enter the organization phone number.
6. Optionally, select the phone type, i.e., mobile, fax, pager.
7. Optionally, select the country that is associated with the address of the organization you are creating.
8. Enter the address in Address 1.
9. Select the state that the organization address is associated with. All other address fields are optional.
10. Click **Create**.

7.2.3 Maintaining Organization Details

Navigation

Customer > Organization

Prerequisites

An organization must exist and you must have access to the organization.

Steps

Follow these steps to edit an existing organization:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. To select an organization, click the organization's link.
The **Organization Detail** Main page opens.
3. Add or update information.

The following table describes the Organization Detail fields.

Table 7-5 Organization Detail Fields

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Organization Name Pronunciation	No	You can enter the organization name pronunciation.

Table 7-5 Organization Detail Fields

Field	Required Field	Description
SIC Code Version	No	Select the Standard Industry Code Version from the drop down list.
DUNS Number	No	Dunn and Bradstreet Number is pre-populated.
Tax Code/ID	No	Enter the tax code.
Email Addressbook	No	Enter the email address here or click the email address book to select another address.
Customer Category	No	Select customer category from the drop down list.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Last Order Date	No	View the last order date.
Web Site Address Book	No	Click the link to view the organization's web site. Click the icon to add or edit web site addresses.
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization. If you want to create relationships between your organization and other external organizations
Number	No	View the number assigned to the organization.
Alias	No	Enter an organization alias.
SIC Code	No	Select an SIC code by entering a partial code and clicking Go . Select from the search results which are a subset of the SIC code version.
External System Number	No	Click the "External System Number" link to view details.
Phonebook	No	Click the phonebook link to select another party phone number to display.
Business Line	No	Enter a business line, if applicable.

Table 7–5 Organization Detail Fields

Field	Required Field	Description
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
Status	No	Select a status from the drop down list.

4. In the Addresses section you can edit information such as:
- Identifying Address: Main address used to identify the organization
 - Address History: Address history of the organization
 - Map It: Map the address by clicking the icon
 - Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
 - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
 - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
 - Status: Displays the status indicated in the details
 - Type: Displays the address type indicated in the details
 - Primary: Used to indicate primary address type across physical addresses

To select an existing address, enter a full or partial address in the Select an Existing Address field and click **Go**.

7.2.3.1 Create an Address

Follow these steps:

1. Click **Create Address**.
2. Select the country from the drop down list. This is a required field.

The page will display fields according to the country that you have chosen. Since each country's address fields may be different, your page may display other fields than those that are listed in the following steps.

3. Enter the address. The only required field is Address 1.
4. Enter the state. This is a required field.
5. Select a status from the drop down list. This is a required field.
6. All other fields are optional.
7. Click **OK**.
The Organization Detail page opens.
8. Click **Update**.

7.2.4 Searching for an Organization

Navigation

Customer > Organization

Prerequisites

An organization must exist.

Steps

Oracle Sales Online provides two ways to search for information: [Quick Find](#) and [Advanced Search](#).

Quick Find

Quick Find is a single field search.

To search using **Quick Find**:

1. Choose the item for which you are searching from the drop down list.
This function provides a simple lookup using the name of the following types of data:
 - Email: matches the email address for organizations, people and contacts
 - Opportunity: matches on the opportunity name
 - Opportunity Owner: matches on the opportunity owner

- Organization: matches on the organization name
- Person: matches on the person's last name
- Contact: matches on the person's last name and they are defined as a contact
- Lead: matches on the lead name
- Company Research: links to the Hoover's Inc. company research database
- Appointment: matches on the appointment name
- Task: matches on the task name
- Notes: matches on the note name

The wildcard character '%' (percent sign) can be used to replace one or more characters in the search string. The '%' cannot be the first character in the search string.

2. Click Go.

The quick find displays only the basic information about the object.

There are profile options to control the level of access to customer, leads and opportunities. When the profile for customers is limited to Sales Team access, you will be able to find the organization, person or contact, but not view the detail screen.

When the profile for leads and opportunity is limited to Sales Team access, you will not be able to find any lead or opportunity unless you are on the sales team.

When the profiles are set to Full access, you will be able to find, view the details, and update the objects.

Advanced Search

The Advanced Search is a parameter driven detailed search related to the tab that is active. In this search, you have the option of saving the search criteria and using it as the default summary screen for the selected tab. In addition to a wide variety of parameters, you can select the columns that you want to display in the search results and select from three levels of sort criteria.

Example

You are trying to locate a person or contact in Oracle Sales Online and only have the person's telephone number and no additional information. Whereas Quick Find is

limited to person, organization, email, etc., Advanced Search allows you to customize your search.

You can search by phone number for person using the following navigation:

1. Customer Tab > Person > Advanced Search
2. Enter the person's phone number.
3. Click **Search**.

Steps

To search using **Advanced Search**:

1. Click the **Advanced Search** link or the Personalize button.
Advanced Searches are available with the following tabs:
 - Customer
 - Partner
 - Lead
 - Opportunity
2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

When saving a search, the name must be different than the seeded searches that are provided with the application. Once a search is saved, the name will become an option for the object's summary screen.

7.2.5 Adding Classifications

You can add classifications to an organization, person, or contact.

Navigation

Customer > Organization, Person, or Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

1. Select a Class Category from the drop down list.
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.
5. Choose a code by selecting the "Select" check box.
6. Click **Select**.
7. Click **Update**.

You can modify and add data, such as Primary, Start Date, and End Date from this page.

7.2.6 Creating and Maintaining Relationships

Organizations can have two types of relationships: Organization to Organization and Organization to Person. Use Organization to Organization relationships to create relationships between companies, such as, parent and subsidiary, headquarters and division, partner and competitor. Use Organization to Person relationships to create business contact relationships.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of customers and related customer existing addresses. If you change one of these addresses, you must complete this action by going to the customer or related customers record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

The Relationships link takes you to the Relationships summary page. From this summary table you can view existing Organization to Organization, Organization to Person relationships, multiple relationship addresses, phone number, start date, end date, and relationship status.

7.2.6.1 Creating an Organization to Organization Relationship

Navigation

Customer > Organization > Relationships

Prerequisites

The Organization should exist.

In comparison to creating a organization to person relationship, creating an organization to organization relationship does not allow you to create a relationship directly into the relationship summary table.

Related Implementation Information

Refer to the "Setting up Relationships" section, "Setting Up Relationships for Customers Upgrading from Previous Releases" of the Oracle Sales Online Implementation Guide. Information about setting the "Create Party" flag to "Yes" is related to this functionality. This setup can be performed by a System Administrator.

Steps

Follow these steps to create a new organization to organization relationship:

1. Search for an organization by clicking the organization link from the summary table, or using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.

The Organization Detail Main page opens once you have selected an organization.

3. Click **Relationships**.
4. Click **Add Relationships**.

The Add Organization to Organization Relationship page appears. You can either select an existing organization or create a new organization.

Alternative 1: Select an Organization

1. Enter the name of the organization that you want to select.
2. Click **Go**.

The search results page opens with the name and all addresses of the organization.

3. From the Search Results page, choose the organization by selecting the radio button.
4. Click **Select**.

5. Choose a **Relationship Type** from the drop down list. This is a required field.
6. Enter information for the relationship, such as phone number, email address, and related notes.
7. Optionally, enter a start and/or end date.
8. Click **Create**.

Alternative 2: Create an Organization

1. Click **Create Organization**.

The Create Organization page appears. [Section 7.2.2, "Creating a New Organization"](#).

2. Click **Create**.

After saving the relationship, the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. Additionally, the Related Organization will become a link and you can view the related organization's detail by clicking to select it.

From the Organization to Organization Relationship Detail page you can change the relationship type, start and end dates, select relationship addresses and designate an identifying related address, add Notes, Tasks, and Attachments.

7.2.6.2 Creating an Organization to Person Relationship

Navigation

Customer > Organization > Relationships

Prerequisites

The Organization should exist.

Steps

Follow these steps to create a new organization to person relationship:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table, using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.

The Organization Detail page opens once you have selected an organization.

3. Click Relationships.

4. Click Add Relationships.

The Add Organization to Person Relationship page appears. You can either select an existing person or create a new person.

Alternative 1: Select a Person

1. Enter the name of the person that you want to select.

2. Click **Go**.

The search results page opens with the name and all addresses of the person.

3. From the Search Results page, choose the organization by selecting the radio button.

4. Click **Select**.

5. Choose a **Relationship Type** from the drop down list. This is a required field.

6. Enter information for the relationship, such as phone number, email address, and related notes.

7. Optionally, enter a start and/or end date.

8. Click **Create**.

Alternative 2: Create a Person

1. Click **Create Person**.

The Create Person page appears. See [Creating a Person](#).

2. Click **Create**.

After saving the relationship the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. From the Relationship Detail page you can change the relationship type, start and end dates, addresses, and add other details such as mail stop, roles, manager information, and job title. Additionally, you can add Notes, Tasks, Interactions, and Attachments to the relationship detail.

7.2.7 Maintaining Lead Details

Navigation

Customer > Organization > Leads

Steps

Follow these steps to maintain lead details from the Organization subtab:

1. Search for the organization from which you want to edit lead details using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.

The Organization Detail Main page opens.

3. Click **Leads**.

You can update the following fields on the Organization Detail page for leads.

- Lead Name
- Customer
- Status
- Lead Rank
- Channel
- Timeframe
- Budget Status
- Budget Amount
- Assigned Date

4. Click **Update**.

7.2.8 Creating Opportunities

You can create opportunities, in the context of a specific organization, by using the following steps.

Navigation

Customer > Organization > Opportunities

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table or, using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
3. Click **Opportunities**.
You will see a summary of all opportunities for the specific organization.
4. Click **Create**.

7.2.9 Maintaining Opportunity Details

You can update opportunity details directly from the summary table.

Navigation

Customer > Organization > Opportunities

Prerequisites

None

Steps

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table or, using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
3. Click **Opportunities**.
You will see a summary of all opportunities for the specific organization.
4. The following fields can be updated:
 - Sales Stage
 - Win Probability

- Status
 - Close Date
 - Amount
5. Update information.
 6. Click **Update**.

7.2.10 Maintaining Quote Details

From the Customer tab you can view and maintain quote details.

Navigation

Customer > Organization > Quotes

Prerequisites

A quote must exist.

Steps

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization or person link to select it.
The Organization Detail page opens.
3. Click **Quotes**.
The Quote Detail page opens.
4. Update quote information.
5. Click **Update**.

For information about using quotes, please refer to the *Oracle HTML Quoting User Guide*.

7.2.11 Notes

In order to better support and service your customers, you can enter comments into a free form text field that you can archive and share with others in your organization.

- [Section 7.2.11.1, "Creating a Note"](#)
- [Section 7.2.11.2, "Viewing a Note"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

7.2.11.1 Creating a Note

Navigation

Customer > Organization > Notes

Prerequisites

None

Steps

Follow these steps to create a note:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The **Organization Detail** Main page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.
You can change the default type using Profiles.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.

Note: Once a note is created, it cannot be updated.

7.2.11.2 Viewing a Note

Navigation

Customer > Organization > Notes

Prerequisites

The note must exist.

Steps

Follow these steps to view a note:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The **Organization Detail** Main page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.
The default type can be changed using Profiles.
5. Choose the number of days for which you want the notes history.
6. Click **Apply**.
7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
8. To view "All Notes" in a printable version, click **All Notes**.

If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

7.2.12 Sales Teams

Sales teams represent all of the salespeople and partners that have ownership of a specific customer. Sales team members can have full access or non-full access (view only) ownership. When a salesperson creates an organization, the salesperson is automatically added to the sales team for that organization.

The Sales Team is divided into two sections:

- Internal: salespeople or internal users
- External: partners and partner users

The partner and partner contacts can be added to the External Sales Team of an organization, lead, or opportunity if:

- Partner has partner profile created.
- Partner should be a sales partner in order to see partner contacts.
- Partner contact should be a valid user and resource.

- Partner needs to be added to the sales team before the contact can be added.

For information about using partners, please refer to the *Oracle Partners Online User Guide*.

You can filter sales teams by the following criteria:

- Sales Group list of values
- Salesperson list of values
- Territory Location list of values
- Roles dropdown

Flexfields will not be included as a filter criteria.

The screen will always show the entire list when the user navigates to the sales team page. The filter parameters cannot be personalized.

See Also

- [Section 7.2.12.1, "Adding a Sales Team Member"](#)
- [Section 7.2.12.2, "Adding a Partner to a Sales Team"](#)
- [Section 7.2.12.3, "Adding a Resource Team to a Sales Team"](#)
- [Section 7.2.12.4, "Removing a Sales Team Member"](#)

Related Profiles

OS: Always Put Customer Creator on Sales Team

If set to "Yes", will always add the creator of a customer to the sales team regardless of access privileges. If set to No, creator of customer will not automatically be added to the sales team if the user has full/prospecting access. For other types of access the creator is added regardless of this profile.

7.2.12.1 Adding a Sales Team Member

Navigation

Customer > Organization > Sales Team > Internal

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Enter the last name or partial name of the sales representative in the "Add a Salesperson" field, and click **Go**.
5. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.
6. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
7. Enter territory properties, and click **Go**.
8. Select a Role from the drop down list. Use the Account Manager role to give special access privileges. A salesperson with an Account Manager role has access to all of the opportunities for this customer.
9. You can view the email address and phone number for this salesperson.
10. Click **Update**.

If you want to associate this salesperson with a specific customer location:

1. Enter the location.
2. Click **Go**.

Additionally, the Keep check box is automatically checked. The Keep flag works with territory management to keep the salesperson or partner contact on the sales team, even when the person is not a resource in a territory.

7.2.12.2 Adding a Partner to a Sales Team

Navigation

Customer > Organization > Sales Team > External

Prerequisites

None

Steps

If you want to add a partner to a sales team, follow these steps:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner.

Reference

Refer to the *Oracle Partners Online User Guide* for more detailed information.

7.2.12.3 Adding a Resource Team to a Sales Team

Resource Teams can also be used to add sales persons to the sales team. The resource team is an independent list of users/sales persons identified by a team name. When you want to add the same set of users to several opportunities, using a resource team makes the process much faster. Resource teams are created and maintained in the CRM Foundation Resource Manager.

Navigation

Customer > Organization > Sales Team > Internal

Prerequisites

None

Steps

To add a resource team to a sales team, follow these steps:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail page opens.

3. Click **Sales Team**.
4. In the Add a Resource field, enter the resource name using the % as a wildcard, and click **Go**.
5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

Members of resource team will be added to the sales team.

7.2.12.4 Removing a Sales Team Member

Navigation

Customer > Organization > Sales Team Member > Internal

Prerequisites

A sales team member must exist on the sales team.

Steps

Follow these steps to remove a sales team member:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Locate the salesperson that you want to remove on the summary table.

Note: You cannot remove the salesperson if they are the only sales team member assigned to the customer.

5. Select the Remove check box.
6. Click **Update**.

7.2.13 Tasks

Tasks provide a way of tracking current and future customer or opportunity activities by providing a list of action items for a specific date range, as well as

maintaining a history of activities. You can create tasks for yourself, assign tasks to others in your organization, and associate tasks with specific organizations.

- [Section 7.2.13.1, "Creating a Task"](#)
- [Section 7.2.13.2, "Adding an Attachment to a Task"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

7.2.13.1 Creating a Task

Navigation

Customer > Organization > Tasks

Prerequisites

None

Steps

Follow these steps to create a task:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Click **Tasks**.
5. Click **Create**.
The Create Task page opens.
6. Select Task Type from the drop down list.
If the task is a private task, select the Private box. This task can only be assigned to you.
7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.

11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the task owner, click **Go**.
14. Select a task owner by clicking the link from the list of search results.
15. Optionally, you can relate the task to an opportunity, organization, person or relationship, click **Go**.

The default, since you are creating the task in the context of an organization, is related to that organization.

16. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

7.2.13.2 Adding an Attachment to a Task

Navigation

Customer > Organization > Attachments

Prerequisites

The task must exist.

Steps

Follow these steps to add an attachment:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Attachments**.
4. Click **Add**.
The **Add Attachment** page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

7.2.14 Interactions

Interactions are customer touch-points that you can view through the Customer tab. You can view interactions entered by sales, marketing, and service department representatives.

- [Section 7.2.14.1, "Viewing Interactions"](#)

7.2.14.1 Viewing Interactions

Navigation

Customer > Organization > Interactions

Prerequisites

The interaction must exist.

Steps

Follow these steps to view interactions:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Interactions**.
4. Select search filters.
5. Click **Apply**.

7.2.15 Attachments

Attachments are defined as documents, URLs, or text. The most common use of attachments is for sharing and storing information about a customer. For example, you can attach a press release about the customer.

- [Section 7.2.15.1, "Adding an Attachment"](#)
- [Section 7.2.15.2, "Viewing an Existing Attachment"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

7.2.15.1 Adding an Attachment

Navigation

Customer > Organization > Attachments

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Attachments**.
4. Click **Add**.
The Add Attachment page opens.
5. Enter a description, click Text, File, or URL.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

7.2.15.2 Viewing an Existing Attachment

Navigation

Customer > Organization > Attachments

Steps

To view an existing attachment, click the attachment link.

7.2.16 Accounts

Accounts are used to track and report financial transactions. Whenever a customer places an order, an invoice is created or payment made, the transactions are posted against the customer's account. In the Campaign to Cash business flow, an account must be created before an order can be entered for the customer.

Only valid addresses that satisfy the address validation rules that you have set up within Oracle Accounts Receivable can be used as account sites. Those that are not valid will display with a "lock" icon and cannot be used to create account sites.

- [Section 7.2.16.1, "Creating Accounts"](#)
- [Section 7.2.16.2, "Maintaining Account Details"](#)
- [Section 7.2.16.3, "Viewing Account Sites"](#)
- [Section 7.2.16.4, "Viewing Account Roles"](#)
- [Section 7.2.16.5, "Viewing Account Relationships"](#)

7.2.16.1 Creating Accounts

Navigation

Customer > Organization > Accounts

Prerequisites

None

Steps

Follow these steps to create an account:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.

The Organization Detail Main page opens.

3. Click **Accounts**.

The Account Summary page opens with all accounts that exist for the Organization or Person.

4. Click **Create**.

The Create Account page opens.

The following table describes the fields available on the Create Account Detail page:

Table 7-6 Create Account Detail Fields

Field	Required Field	Description
Account Name	No	Enter the account name.
Account Number	Yes	Depending on your profile set up, the account number may be automatically generated. If the field is not already filled in, enter an account number.
Status	No	Select a status from the drop down list.
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.
Subcategory Code	No	Select a subcategory code from the drop down list.
Tax Code	No	Select a tax code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.

5. Click **Create**.

7.2.16.2 Maintaining Account Details

Navigation

Customer > Organization > Accounts

Prerequisites

An account for an organization must exist.

Steps

Follow these steps to view an account:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Accounts**.

4. Select an account from the summary table by clicking the account's link.

The Account Detail page opens.

The following table describes the Account Detail fields.

Table 7-7 Account Detail Fields

Field	Required Field	Description
Account Name	No	Enter the account name.
Account Number	Yes	View the account number.
Status	Yes	Select a status from the drop down list.
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.
Established Date	No	Select the date the account was established from the calendar.
Subcategory Code	No	Select a subcategory code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.
Tax Code	No	Select a tax code from the drop down list.
Current Balance	No	View the current account balance.
Payment Term	No	Enter the payment terms.
Suspension Date	No	View the suspension date.
Termination Date	No	View the termination date.

5. Edit information.
6. Click **Update**.

7.2.16.3 Viewing Account Sites

Navigation

Customer > Organization > Accounts

Prerequisites

An account site must exist.

Steps

Follow these steps to view an account site:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
5. Click **Sites**.
 1. To add a site, click **Add Site**.
 2. Select an address that already exists
 - Change the site use by selecting from the drop down list
 - Select the Primary check box, if applicable
 - Change the site Status by selecting from the drop down list
 3. To view site details, click the site **Address** link.
 4. To view site history, click **History**.
 5. To map the site address, click **Map It**.

7.2.16.4 Viewing Account Roles

Navigation

Customer > Organization > Accounts

Prerequisites

An account role must exist.

Steps

Follow these steps to view an account role:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
5. Click **Roles**.
 1. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using % as a wildcard. Click **Go**.
 2. To remove a role, locate the related account and click the Erase icon.
 3. To change the role type, select from the drop down list.
 4. To indicate a primary role, select the Primary Role radio button.
 5. To change the status, select from the drop down list.
 6. To find an address, enter the full or partial address using % as a wildcard. Click **Go**.
 7. Select an effective date by clicking the calendar icon and choosing a date.
 8. Select an end date by clicking the calendar icon and choosing a date.
6. Click **Update**.

7.2.16.5 Viewing Account Relationships

Navigation

Customer > Organization > Accounts

Prerequisites

An account relationship must exist.

Steps

Follow these steps to view an account relationship:

1. Search for the organization using [Quick Find and Advanced Search](#).
2. Click the organization link to select it.
The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
5. Click **Relationships**.
 1. To remove a relationship, locate the related account and click the Erase icon.
 2. To find a related account number, enter the account number and click **Go**.
The related account name will populate the field.
 3. To change the relationship type, select from the drop down list.
 4. To change the status, select from the drop down list.
 5. To indicate a reciprocal relationship, select the Reciprocal check box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
6. Click **Update**.

7.2.17 360 Degree View

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns, and Service Requests.

The 360 degree view provides you with a way to look at the enterprise level activities of your organization. You can browse orders, invoices, returns, products, and service requests in detail by clicking the associated link. If the organization has several accounts, choose one from the drop down list.

7.2.17.1 Viewing 360 Degree View

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns,

Service Requests, and Quotes. To view projects from the 360 degree view, Oracle Projects must be installed.

Navigation

Customer > Organization > 360 View

Prerequisites

In order to use the 360 degree view, you must have *iStore* installed to view orders, Install Base to view products installed, and *iSupport* to view the Invoices, Returns, and Service Requests.

Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, select an organization or person. Search using [Quick Find and Advanced Search](#).
The Organization detail main page opens.
2. Click **360 View**.
3. You can view summary pages for each of the following by clicking each link:
 - **Orders:** Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.
 - **Invoices:** Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.
 - **Service Requests:** A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.
 - **Products:** This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.
 - **Returns:** Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.
 - **Projects:** You can view the projects for the associated customer organization or person. Drill down to view the project details.

- Campaigns: Provides a list of campaigns the customer has been a part of. This is populated from Oracle Marketing Online.
 - Events: A list of events onto which the customer has enrolled. This is populated from Oracle Marketing Online.
4. Click a link to view the details of any available item.

7.3 Person Subtab

The following tasks can be performed from the Person subtab:

- [Personalizing Person Summary](#)
- [Creating a Person](#)
- [Maintaining Person Details](#)
- [Adding Classifications](#)
- [Searching for a Person](#)
- [Sending Collateral](#)
- [Creating and Maintaining Relationships](#)
- [Leads](#)
- [Creating Opportunities](#)
- [Maintaining Quote Details](#)
- [Notes](#)
- [Sales Teams](#)
- [Tasks](#)
- [Interactions](#)
- [Attachments](#)
- [Accounts](#)
- [360 Degree View](#)

7.3.1 Person Summary

Within Oracle Sales Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be

supported equally. People are both customers and business contacts. The definition of a contact is a person who has a relationship (usually an employee/employer relationship) with the organization (or another person) with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, i.e., an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet number, or tax identification number.

An example:

Person A is a Business to Consumer customer and an employee of Company B. This relationship (employee of) makes Person A a contact of Company B.

7.3.2 Personalizing Person Summary

You can use the Personalize button to define your own personal list of People. The default view is "My People" where you will see details for those people who are also on your sales team.

Navigation

Customer > Person

Steps

Follow these steps to personalize the person summary:

1. Click **Personalize**.
2. Either choose an existing search by selecting it from the drop down list and click **Go** OR enter search criteria in Person, Address, Sales Team, Relationship sections, if desired to view consumers.
3. Choose display options.
4. Enter a Search Name.
5. Select the Use as Summary Page Default check box.
6. Click **Save**, or **Save and Apply Search**. If you want to search without saving the search, click **Search**.

Saved Searches appear in a drop down list on the Person page.

7.3.3 Creating a Person

Navigation

Customer > Person

Prerequisites

None

Related Profiles

Profile options set during implementation govern the way a person is created. The profile option "**OS: Address Required for Person**" affects the application in the following ways:

- If set to "Yes" then the address is mandatory for creating a person. It is then required that you go to the "Create Person" page where you must enter the address while creating the person. In this case there are no empty rows in the contact table.
- If set to "No" then you can create without the address. You are not required to go to the "Create Person" page. Instead, you can create a new person and a contact by entering data in empty rows in the contact table. In this case the "Create Person" button is not displayed.

Please refer to the *Oracle Sales Online Implementation Guide* for information on setting profile options.

OS: Create Person Privilege: If set to "Yes", user can create people.

Steps

In order to maintain customer data integrity, it is a good business practice to first search the database before creating a new person.

Follow these steps to create a person from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.
2. Click **Create** or go to [Steps for Quick Create](#).

The Create Person page opens.

The following table describes the fields in the create person section.

Table 7-8 Create Person Fields

Field	Required Field	Description
Last Name	Yes	Enter the last name of the person you are creating.
First Name	Yes	Enter the first name of the person you are creating.
Middle Name	No	Enter the middle name of the person you are creating.
Last Name Pronunciation	No	Enter the pronunciation of the last name of the person you are creating.
First Name Pronunciation	No	Enter the pronunciation of the first name of the person you are creating.
Preferred Name	No	Enter the name by which the person you are creating prefers to be addressed, if different from their actual name, if applicable.
Title	No	Select a title that is appropriate for the person you are creating.
Second Title	No	
Suffix	No	Enter a suffix, if applicable.
Gender	No	Select a gender from the drop down list.
Date of Birth	No	
Native Language	No	
Status	No	Select a status from the drop down list.

The following table describes the Business Information section.

Table 7-9 Business Information Fields

Field	Required Field	Description
Relationship	No	Select a relationship from the drop down list.
Organization	Yes	Select an organization to form the business relationship with.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking Go .
Mail Stop	No	
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.

Table 7–9 Business Information Fields

Field	Required Field	Description
Job Title Type	No	
Role	No	Select a role from the drop down list.
Business Phone Book	No	Select a phone number from the party list by clicking the phonebook icon.
Start Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Select the check box to indicate that the person is a decision maker.
Reference	No	Select the check box to indicate the person can be considered a reference.
Do Not Mail	No	Select the check box to indicate that no mail is to be sent.

3. In the Personal Information section, you can enter information such as:
 - Personal Phone Book: Select a phone number by clicking the phone book icon
 - Address Type: Select from the list of values
 - Address Lines 1-4: Enter information into the address fields
 - County: Enter information into the field
 - Start Date: Select by clicking the calendar icon and choosing a date
 - Do Not Mail: Select the check box to indicate "do not mail"
4. In the Notes sections, you can enter notes associated with this person.
 1. Select the note type from the drop down list.
 2. Enter text in the Text box.
 3. Click **Create**.

You have successfully created a person when the Person Detail Main page opens.

Steps for Quick Create

1. Click **Quick Create**.
2. The Quick Create Person page opens.

3. Enter the last name and first name of the person that you are creating.
4. Optionally, select the person's date of birth.
5. Optionally, enter the person's phone number.
6. Optionally, select the phone type of the phone number, i.e., fax, mobile, pager.
7. Optionally, select the country that is associated with the address of the person you are creating.
8. Enter the address in Address 1.
9. Select the state that the person address is associated with. All other address fields are optional.
10. Click **Create**.

7.3.4 Maintaining Person Details

Navigation

Customer > Person

Prerequisites

A person must exist.

Steps

Follow these steps to maintain person details from the Customer tab:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person from the Search Results page by clicking the person's link.

The Person Detail page opens.

The following table describes the Person Details fields.

Table 7–10 *Person Detail Fields*

Field	Required Field	Description
Last Name	Yes	This is the last name of the person.
First Name	Yes	This is the person's first name.
Preferred Name	No	If they have a preferred name, you can enter it here.

Table 7–10 Person Detail Fields

Field	Required Field	Description
Title	No	This is the title by which the person prefers to be addressed.
Suffix	No	Enter a suffix, such as Mr., Mrs., Ms., Dr.
Gender	No	This is the gender of the person.
Personal Phone Book	No	This is the personal phone number for the person.
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
External System Number	No	View the external system number.
Last Name Pronunciation	No	Enter the pronunciation of the last name.
First Name Pronunciation	No	Enter the pronunciation of the first name.
Middle Name	No	Enter the middle name.
Second Title	No	Enter the second title, if desired.
Date of Birth	No	Select the date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.
Last Order Date	No	View the last order date.
Status	No	Select from the drop down list.

3. In the Personal Addresses section you can edit information such as:
 - Identifying Address: Main address used to identify the person
 - Address History: Address history of the person
 - Map It: Map the address by clicking the icon
 - Phonebook: This is the phone number that is associated with a particular address. For example, if you are a sales person and have several field offices that you frequent, you can have a phone number for the Miami office, the

Orlando office, and the Tampa office recorded in this area. Change the phone number by clicking the phone icon.

- Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
 - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
 - Status: Displays the status indicated in the details
 - Type: Displays the address type indicated in the details
 - Select an Existing Address: Enter a full or partial address and click **Go**
 - Create Address: To create an address, click **Create Address**
4. In the Product Interests section you can edit information such as:
 - Remove: To remove a product interest item, select the Remove check box
 - Product: Select a product from the drop down list
 - Comments: Enter comments directly into the comments field
 5. In the Personal Interests section you can edit information such as:
 - Remove: To remove a personal interest item, select the Remove check box
 - Interest Type: Select an interest type from the drop down list
 - Comments: Enter comments directly into the comments field
 6. In the Restrictions section you can edit information such as:
 - Remove: To remove a restriction item, select the Remove check box
 - Restriction Type: Select a restriction type from the drop down list
 - Start Date: Select a start date by clicking the calendar icon and choosing a date
 - End Date: Select an end date by clicking the calendar icon and choosing a date
 - Reason: Enter a reason into the field
 7. Click **Update**.

You can also get directions to the address by clicking the Map icon in the Map It column.

You can view a history of all the previous occupants of the physical address by clicking the **Address History** link.

7.3.5 Adding Classifications

You can add classifications to an organization, person, or contact.

Navigation

Customer > Organization, Person, or Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

1. Select a Class Category from the drop down list.
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.
5. Choose a code by selecting the "Select" check box.
6. Click **Select**.

7.3.6 Searching for a Person

Navigation

Customer > Person

Prerequisites

A person must exist.

Steps

Follow these steps to search for a person:

1. Search for a person using [Quick Find and Advanced Search](#).

2. To select the person, click the person's link.

7.3.7 Sending Collateral

Send collateral to your business contacts using this feature.

Prerequisites

Fulfillment templates must be set up in the Oracle Marketing Encyclopedia System (MES). Please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures* guide for more information on setting up fulfillment templates.

Steps

Follow these steps to send collateral:

1. Select a customer. Use [Quick Find and Advanced Search](#).
2. Click **Send Collateral**.
The Fulfillment Wizard page opens.
3. Select a Template from the drop down list.
4. Click **Continue**.
5. Select a Master Document by selecting the check box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Select the Output Method (email) from the drop down list, and click **Continue**.
The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list.
9. Click **Done**.

7.3.8 Creating and Maintaining Relationships

In Oracle Sales Online, people can have two types of relationships; Person to Organization and Person to Person.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of customers and related customer existing addresses. If you change one of these addresses, you must complete this action by going to the customer or related customer's record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

Related Implementation Information

Refer to the "Setting up Relationships" section, "Setting Up Relationships for Customers Upgrading from Previous Releases" of the Oracle Sales Online Implementation Guide. Information about setting the "Create Party" flag to "Yes" is related to this functionality. This setup can be performed by a System Administrator.

7.3.8.1 Creating a Person to Organization Relationship

Navigation

Customer > Person > Relationship

Prerequisites

None

Steps

Follow these steps to create a new person to organization relationship:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Click the person's name link to select it.
The Person Detail Main page opens.
3. Click **Relationships**.
4. Click **Add Relationship** in the Person to Organization Relationships section.
The Add Person to Organization Relationship page opens.
5. Search for an organization by entering the full or partial name of the organization in the "Select an Organization" field, and click **Go**.
6. From the Search Results page, select an organization for which you want to create a relationship by clicking the organization's link. The organization will populate the related Organization field, a required field, on the relationship detail page.
7. Choose a Relationship Type from the drop down list.
8. Enter a Start Date.
9. Optionally, enter an End Date.
10. Optionally, select a phone number by clicking the Phonebook icon.

11. Select a Status from the drop down list.
12. In the Notes section, you can enter a note by selecting the note type from the drop down list, and entering the note text in the text field.
13. Click **Create**.

The Relationship Detail page opens. From this page you can edit details about the relationship, roles, addresses, and restrictions.

 - a. View the relationship type.
 - b. Edit the start date by clicking the calendar icon and selecting another date.
 - c. Edit the phone number by clicking the phone book icon.
 - d. Edit the mail stop, department, job title.
 - e. Select the preferred language from the drop down list.
 - f. Select or deselect the Decision Maker and Reference check boxes.
 - g. Send collateral by selecting the Collateral Recipient check box and clicking **Send Collateral**
14. In the Address section, you can change the following:
 - Identifying address, select or deselect the radio button
 - View the address history by clicking **History**
 - Map the address by clicking the Map It icon
 - Enter a start date and end date by clicking the calendar icon and selecting dates
 - Edit the status by selecting from the drop down list
 - View Type
 - View Primary
15. In the Roles section, you can do the following:
 - Choose Role or Roles from the drop down list
 - Designate a primary role
16. In the Restrictions section, you can do the following:
 - Erase a restriction by clicking the erase icon
 - Change the restriction type by selecting from the drop down list

- Select start and end dates by clicking the calendar icon
- Enter a reason into the "Reason" field

17. Click Update.

Additionally, you can add notes, tasks, interactions, and attachments.

7.3.8.2 Creating a Person to Person Relationship

Use these steps to create a relationship between people. For example, Mary Kline reports to Ken Smith.

Navigation

Customer > Person > Relationships

Prerequisites

None

Steps

1. Search for a person using [Quick Find and Advanced Search](#).
2. Click a person's name link to select it.
3. Click **Relationships**.

From the Person Detail page, you can do the following in the Person to Person Relationships section:

- View active, inactive, or all relationships for this person.
- Edit start and end dates by clicking the calendar icon and selecting another date.
- View the status of the relationship.
- Send collateral by selecting the Collateral Recipient check box and clicking **Send Collateral**.

4. Click **Add Relationship**.

The Add Person to Person Relationship page opens.

5. In the Select a Person field, enter the full or partial name and click **Go**.
6. From the Search Results page, select the person for which you want to create the relationship by clicking the person's link.

The person's name populates the related Person field, a required field, on the Relationship Detail page.

7. Enter the address.
8. Choose a Relationship Type from the drop down list.
9. Enter a Start Date.
10. Optionally, enter an End Date.
11. Optionally, select a phone number by clicking the Phonebook icon.
12. Select a Status from the drop down list.
13. In the Notes section, you can enter a note by selecting the note type from the drop down list, entering the note text in the text field.
14. Click **Create**.

The Relationship Detail page opens. From this page you can edit details about the relationship, roles, addresses, and restrictions.

15. Click **Update**.

Additionally, you can add classification, notes, tasks, interactions, and attachments.

7.3.9 Leads

From the Person subtab, you can maintain lead details.

- [Section 7.3.9.1, "Maintaining Lead Details"](#)

7.3.9.1 Maintaining Lead Details

Navigation

Customer > Person > Leads

Prerequisites

A lead must exist.

Steps

Follow these steps to main lead details:

1. Search for a person using [Quick Find and Advanced Search](#).

2. Click the person's link to select it.
The Person Detail Main page opens.
3. Click **Leads**.
The Leads summary page opens.
4. Select a lead by clicking the lead link.
The Lead Detail page opens.
5. Update lead details.
6. Click **Update**.

7.3.10 Creating Opportunities

Navigation

Customer > Person > Opportunities

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person by clicking the person's link.
The Person Detail page opens.
3. Click **Opportunities**.
4. Click **Create**.
The Create Opportunity page opens.
5. From this page you can enter opportunity details, purchase items, contacts, and notes information. Required fields are marked with an asterisk.
6. Click **Create**.

If you select the Display Contact Opportunities radio button on the Person Detail Main page shows all opportunities in which this person is a contact on

the opportunity. If you select the Display Person Opportunities radio button, you will see all opportunities in which the opportunity is for the person.

7.3.11 Maintaining Quote Details

From the Customer tab you can view and maintain quote details.

Navigation

Quote

Prerequisites

A quote must exist.

Steps

Follow these steps to maintain quote details:

1. Search for the person using [Quick Find and Advanced Search](#).
2. Click the person's link to select it.
The Organization or Person Detail Main page opens.
3. Click **Quotes**.
The Quote Detail page opens.
4. Update quote information.
5. Click **Update**.

7.3.12 Notes

In order to provide better support and service to your customers, you can enter comments into a free form text field that you can archive and share with others in your organization. The Notes tab represents a log of information that is stored about a particular customer, organization, person, contact, forecast, or opportunity.

- [Section 7.3.12.1, "Creating a Note"](#)
- [Section 7.3.12.2, "Viewing a Note"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

7.3.12.1 Creating a Note

Navigation

Customer > Person > Notes

Prerequisites

None

Steps

Follow these steps to create a note:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person by clicking the person's link.
The **Person Detail** page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.

You can change the default type by changing the Profile. Click the Profiles icon in the upper right corner of the application page.

5. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.

Note: Once a note is created, it cannot be updated.

7.3.12.2 Viewing a Note

Navigation

Customer > Person > Notes

Prerequisites

None

Steps

Follow these steps to view a note:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person by clicking the person's name link.
The Person Detail page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.
5. Choose the number of days for which you want the notes history.
6. Click **Apply**.

If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

Click **All Notes** to view all the notes in a printer-friendly format. Click the **Text** icon to see the entire note.

7.3.13 Sales Teams

Sales teams represent all of the salespeople and partners that have ownership of a specific customer. Sales team members can have full access or non-full access (view only) ownership.

The Sales Team is divided into two sections:

- Internal: Salespeople or internal users
- External: Partners and Partner users

The partner and partner contacts can be added to the External Sales Team of an organization, lead, or opportunity if:

- Partner has partner profile created.
- Partner should be a sales partner in order to see partner contacts.
- Partner contact should be a valid user and resource.
- Partner needs to be added to the Sales team before the contact can be added.

You can filter sales teams by the following criteria:

- Sales Group list of values

- Sales person list of values
- Territory Location list of values
- Roles dropdown

Flexfields will not be included as a filter criteria.

The screen will always show the entire list when the user navigates to the sales team page. The filter parameters cannot be personalized.

See Also

- [Section 7.3.13.1, "Adding a Sales Team Member"](#)
- [Section 7.3.13.2, "Adding a Partner to a Sales Team"](#)
- [Section 7.3.13.3, "Adding a Resource Team to a Sales Team"](#)
- [Section 7.3.13.4, "Removing a Sales Team Member"](#)

Related Profiles

OS: Always Put Customer Creator on Sales Team

If set to "Yes", will always add the creator of a customer to the sales team regardless of access privileges. If set to No, creator of customer will not automatically be added to the sales team.

7.3.13.1 Adding a Sales Team Member

Navigation

Customer > Person > Sales Team > Internal

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person by clicking the person's link.
The Person Detail page opens.
3. Click **Sales Team**.

4. Enter the last name or partial name of the sales rep in the "Add a Salesperson" field, click **Go**.
5. If you are searching for a salesperson outside of your Business Unit, choose the business unit from the drop down list, click **Go**.
6. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
7. Enter territory properties, and click **Go**.
8. Select a Role from the drop down list.
9. You can view the email address and phone number fro this salesperson.
10. Click **Update**.

7.3.13.2 Adding a Partner to a Sales Team

Navigation

Customer > Person > Sales Team > External

Prerequisites

None

Steps

If you want to add a partner to the sales team, follow these steps:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person by clicking the person's link.
The Person Detail page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
It is recommended that you search by last name only.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

7.3.13.3 Adding a Resource Team to a Sales Team

Resource Teams can also be used to add salespersons to the sales team. The resource team is an independent list of users/sales persons identified by a team name. When you want to add the same set of users to several opportunities, using a resource team makes the process much faster. Resource teams are created and maintained in the CRM Foundation Resource Manager.

Navigation

Customer > Person > Sales Team > Internal

Prerequisites

None

Steps

To add a resource team to a sales team, follow these steps:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Click the person's link to select it.
The Person Detail page opens.
3. Click **Sales Team**.
4. In the Add a Resource field, enter the resource name using % as a wildcard, and click **Go**.
5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

For sales teams, if you add a sales person to the sales team using Add Resource Team, and if a resource team contains partners, then the partners will not appear in the internal sales team. Partner resources will appear in the external sales team. This applies to Leads, Opportunities, and Customers.

7.3.13.4 Removing a Sales Team Member

Navigation

Customer > Person > Sales Team > Internal

Prerequisites

A sales team member must exist on the sales team.

Steps

Follow these steps to remove a sales team member:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Click the person link to select it.
The Person Detail page opens.
3. Click **Sales Team**.
4. Locate the sales person that you want to remove from the sales team.

Note: You cannot remove the salesperson if they are the only sales team member assigned to the customer.

5. Select the **Remove** check box.
6. Click **Update**.

7.3.14 Tasks

Tasks provide a way of tracking current and future customer or opportunity activities by providing a list of action items for a specific date range, as well as maintaining a history of activities. You can create tasks for yourself, assign tasks to others in your organization, and associate tasks with specific opportunities, organizations, people or relationships.

- [Section 7.3.14.1, "Creating a Task"](#)
- [Section 7.3.14.2, "Maintaining Task Details"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

7.3.14.1 Creating a Task

Navigation

Customer > Person > Tasks

Prerequisites

None

Steps

Follow these steps to create a task:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person from the Search Results page by clicking the person's name link.
The Person Detail page opens.
3. Click **Tasks**.
4. Click **Create**.
5. Select Task Type from the drop down list.
6. If the task is a private task, select the **Private** box. This task can only be assigned to you.
7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the person you are assigning the task, click **Go**.
14. The "Relate to" field defaults to the person, click **Go**.
If you click the **Clear** button from this page, you will clear all information, including the Person the task is related to. If you continue creating this task by re-entering the information, this task will not be related to this person.
15. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

7.3.14.2 Maintaining Task Details

Navigation

Customer > Person > Tasks

Prerequisites

A task must exist.

Steps

Follow these steps to view a task:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Click the person's link.
The Person Detail main page opens.
3. Click **Tasks**.
The summary table displays all tasks for the person.
4. Click the task link to view details.
The Task Detail page opens.
5. Click **Update**.

7.3.15 Interactions

An interaction is a point of contact and may relate to customers, campaigns, agents, orders, and quotes. 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.

Note: Oracle Sales Online users cannot create or edit interactions.

7.3.15.1 Viewing Interactions

Navigation

Customer > Person > Interactions

Prerequisites

Interactions must exist.

Steps

You can view interactions entered by sales, marketing, and service department representatives.

Follow these steps to view interactions:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person from the Search Results page by clicking the person's name link.
The Person Detail page opens.
3. Click **Interactions**.
4. You can select filters such as Media Type, Activity, Source, and Date Ranges.
5. Click **Apply**.

For more detailed information about interactions, please refer to the *Oracle CRM Application Foundation User Guide*.

7.3.16 Attachments

Attachments are defined as documents, URLs, or text. The most common use of attachments is for sharing and storing information about a person, organization, relationship, forecast, task, or opportunity. For example, you can attach written correspondence with a particular organization contact to that contact's record.

- [Section 7.3.16.1, "Adding an Attachment"](#)
- [Section 7.3.16.2, "Viewing an Existing Attachment"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

7.3.16.1 Adding an Attachment

Navigation

Customer > Person > Attachments

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person.
The Person Detail page opens.
3. Click **Attachments**.
4. Click **Add**.
The Add Attachment page opens.
5. Enter a description, click Text, File, or URL.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

7.3.16.2 Viewing an Existing Attachment

Navigation

Customer > Person

Steps

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select a person.
The **Person Detail** page opens.
3. Click the attachment link from the person's detail page.

7.3.17 Accounts

You can create accounts and maintain the account details from the Person subtab. Click one of the links below to go to the step-by-step instructions in the Customer, Organization section on how to:

- [Section 7.3.17.1, "Creating Accounts"](#)
- [Section 7.3.17.2, "Maintaining Account Details"](#)
- [Section 7.3.17.3, "Viewing Account Sites"](#)
- [Section 7.3.17.4, "Viewing Account Roles"](#)

- [Section 7.3.17.5, "Viewing Account Relationships"](#)

7.3.17.1 Creating Accounts

Navigation

Customer > Person > Accounts

Prerequisites

None

Steps

Follow these steps to create an account:

1. Search for the person using [Quick Find and Advanced Search](#).
2. Click the person link to select it.
The Person Detail Main page opens.
3. Click **Accounts**.
The Account Summary page opens with all accounts that exist for the Person.
4. Click **Create**.
The Create Account page opens.
The following table describes the fields available on the Create Account Detail page:

Table 7–11 Create Account Detail Fields

Field	Required Field	Description
Account Name	No	Enter the account name.
Account Number	Yes	Depending on your profile set up, the account number may be automatically generated. If the field is not already filled in, enter an account number.
Status	No	Select a status from the drop down list.
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.

Table 7–11 Create Account Detail Fields

Field	Required Field	Description
Subcategory Code	No	Select a subcategory code from the drop down list.
Tax Code	No	Select a tax code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.

5. Click **Create**.

7.3.17.2 Maintaining Account Details

Navigation

Customer > Person > Accounts

Prerequisites

An account for a person must exist.

Steps

Follow these steps to view an account:

1. Search for the person using [Quick Find and Advanced Search](#).
2. Click the person link to select it.
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
The following table describes the Account Detail fields.

Table 7–12 Account Detail Fields

Field	Required Field	Description
Account Name	No	Enter the account name.
Account Number	Yes	View the account number.
Status	Yes	Select a status from the drop down list.
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.
Established Date	No	Select the date the account was established from the calendar.
Subcategory Code	No	Select a subcategory code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.
Tax Code	No	Select a tax code from the drop down list.
Current Balance	No	View the current account balance.
Payment Term	No	Enter the payment terms.
Suspension Date	No	View the suspension date.
Termination Date	No	View the termination date.

5. Edit information.

6. Click **Update**.

7.3.17.3 Viewing Account Sites

Navigation

Customer > Person > Accounts

Prerequisites

An account site must exist.

Steps

Follow these steps to view an account site:

1. Search for the person using [Quick Find and Advanced Search](#).
2. Click the person link to select it.
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
5. Click **Sites**.
 1. To add a site, click **Add Site**.
 2. Select an address that already exists
 - Change the site use by selecting from the drop down list
 - Select the Primary check box, if applicable
 - Change the site Status by selecting from the drop down list
 3. To view site details, click the site **Address** link.
 4. To view site history, click **History**.
 5. To map the site address, click **Map It**.

7.3.17.4 Viewing Account Roles

Navigation

Customer > Person > Accounts

Prerequisites

An account role must exist.

Steps

Follow these steps to view an account role:

1. Search for the person using [Quick Find and Advanced Search](#).
2. Click the person link to select it.
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
5. Click **Roles**.
 1. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using % as a wildcard. Click **Go**.
 2. To remove a role, locate the related account and click the Erase icon.
 3. To change the role type, select from the drop down list.
 4. To indicate a primary role, select the Primary Role radio button.
 5. To change the status, select from the drop down list.
 6. To find an address, enter the full or partial address using % as a wildcard. Click **Go**.
 7. Select an effective date by clicking the calendar icon and choosing a date.
 8. Select an end date by clicking the calendar icon and choosing a date.
6. Click **Update**.

7.3.17.5 Viewing Account Relationships

Navigation

Customer > Person > Accounts

Prerequisites

An account relationship must exist.

Steps

Follow these steps to view an account relationship:

1. Search for the person using [Quick Find and Advanced Search](#).
2. Click the person link to select it.

The Person Detail Main page opens.

3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

The Account Detail page opens.

5. Click **Relationships**.
 1. To remove a relationship, locate the related account and click the Erase icon.
 2. To find a related account number, enter the account number and click **Go**.

The related account name will populate the field.
 3. To change the relationship type, select from the drop down list.
 4. To change the status, select from the drop down list.
 5. To indicate a reciprocal relationship, select the Reciprocal check box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
6. Click **Update**.

7.3.18 360 Degree View

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns, Service Requests. For more information about *iStore*, *Install Base*, and *iSupport* please refer to the *Oracle iStore and Oracle iMarketing Implementation Guide* and *Oracle iSupport Implementation Guide*.

The 360 degree view provides you with a way to look at the enterprise level activities of a person. You can browse orders, invoices, returns, products, service requests, and quotes in detail by clicking the link. If the person has several accounts, choose one from the drop down list. Additionally you can drill down into the details of each order by clicking the details link.

7.3.18.1 Viewing 360 Degrees

Navigation

Customer > Person > 360 View

Prerequisites

In order to use the 360 degree view, you must have iStore installed to view orders, Install Base to view products installed, and iSupport to view the Invoices, Returns, Service Requests, and Quotes. Additionally, Oracle Projects must be installed to view projects.

Steps

Follow these steps to use 360 degree view:

1. Search for a person using [Quick Find and Advanced Search](#).
2. Select the person from the search results.
3. Click **360 View**.
4. You can view summary pages for each of the following by clicking each link:
 - **Orders:** Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.
 - **Invoices:** Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.
 - **Service Requests:** A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.
 - **Products:** This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.
 - **Returns:** Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.
 - **Projects:** You can view the projects for the associated customer organization or person. Drill down to view the project details.
 - **Campaigns:** Provides a list of campaigns the customer has been a part of. This is populated from Oracle Marketing Online.
 - **Events:** A list of events onto which the customer has enrolled. This is populated from Oracle TeleSales.
5. Click a link to view the details of any available item.

7.4 Contacts Subtab

From the Contacts subtab, you can easily access organization to person relationships, also referred to as business contacts.

Within Oracle Sales Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a contact is a person who has a relationship (usually an employee/employer relationship) with the organization (or another person) with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, i.e., an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet number, or tax identification number.

An example:

Person A is a Business to Consumer customer and an employee of Company B. This relationship (employee of) makes Person A a contact of Company B.

See Also

- [Section 7.4.1, "Personalize Contact Summary"](#)
- [Section 7.4.2, "Creating a Contact"](#)
- [Section 7.4.3, "Searching for a Contact"](#)
- [Section 7.4.4, "Maintaining Contact Details"](#)
- [Section 7.4.5, "Adding Classifications"](#)
- [Section 7.4.6, "Managing Contact Notes"](#)
- [Section 7.4.7, "Searching for a Contact"](#)
- [Section 7.4.8, "Creating a Contact Task"](#)
- [Section 7.4.9, "Managing Contact Attachments"](#)
- [Section 7.4.10, "Managing Contact Interactions"](#)
- [Section 7.4.11, "Sending Collateral from the Contact Summary Table"](#)

7.4.1 Personalize Contact Summary

Navigation

Customer > Contact

Prerequisites

None

Steps

1. Click **Personalize**.
2. Enter search filters in the Person, Address, Sales Team, Relationship sections, if desired.
3. Select display options and sort options.
4. Enter a Search Name.
5. Select the Use as Summary Page Default check box.
6. Click **Save**, or **Save and Apply Search**.

Saved Searches appear in a drop down list on the Contact page.

Note: The Advanced Search link and Personalize button take you to the same Contact Search page.

7.4.2 Creating a Contact

Navigation

Customer > Contact

Prerequisites

None

Related Profiles

OS: Create Contact Privilege: If set to "Yes", user can create contacts.

Steps

1. Click **Create**.
The Create Contact page opens.
2. Select an existing person or create a new person.
 - a. To select an existing person, enter the full or partial name in the "Select a Person" field and click **Go**. From the search results page select the radio button of the person that you want to select and click the **Select** button.

7. In the Relate to section, enter information about the related entity.
8. Click **Create**.

7.4.3 Searching for a Contact

Navigation

Customer > Contact

Steps

1. You can search for a contact using [Quick Find and Advanced Search](#).
2. To select the contact, click the contact link.

7.4.4 Maintaining Contact Details

Navigation

Customer > Contact

Prerequisites

A contact must exist.

Steps

1. You can search for a contact using [Quick Find and Advanced Search](#).
2. Click the relationship link in the summary table.
3. Edit or update information.
4. Click **Update**.

You can also view details directly from the contact summary table. Follow these steps:

- a. View person details by clicking the person link.
- b. View person to organization or person to person relationship details by clicking the relationship link.
- c. View party details by clicking the party link.
- d. View the identifying relationship address on the summary table.

- e. View the email address on the summary table. To edit the email address, click the email address book icon.

7.4.5 Adding Classifications

You can add classifications to a contact.

Navigation

Customer > Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

1. Select a Class Category from the drop down list.
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.
5. Choose a code by selecting the "Select" check box.
6. Click the **Select** button.

7.4.6 Managing Contact Notes

Navigation

Customer > Contact > Notes

Prerequisites

None

Steps

1. Search for a contact using [Quick Find and Advanced Search](#).

2. From the search results page, click the relationship link.
3. Click **Notes**.
4. Select a Type from the drop down list.
5. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.

Note: Once a note is created, it cannot be updated.

7.4.7 Searching for a Contact

Navigation

Customer > Contact

Steps

Search for a contact using [Quick Find and Advanced Search](#).

7.4.8 Creating a Contact Task

Navigation

Customer > Contact

Prerequisites

None

Steps

1. Search for a contact using [Quick Find and Advanced Search](#).
2. From the search results, click the relationship link.
3. Click **Tasks**.
4. Click **Create**.

The Create Task page opens.

5. Select Task Type from the drop down list.
If the task is a private task, select the Private check box.
6. Enter the Task Name.
7. Enter the Task Description.
8. Choose the Priority from the drop down list.
9. Select the Status from the drop down list.
10. Select a planned start date by clicking the calendar icon and selecting a date.
11. Optionally, select a planned start time and end time by selecting from the drop down lists.
12. Enter the name of the task owner, click **Go**.
13. Select a task owner by clicking the link from the list of search results.
14. Click **Create**.

7.4.9 Managing Contact Attachments

Navigation

Customer > Contact

Prerequisites

None

Steps

1. Search for a contact using [Quick Find and Advanced Search](#).
2. From the search results, click the relationship link.
3. Click **Attachments**.
4. Click **Add**.
The **Add Attachment** page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

7.4.10 Managing Contact Interactions

Navigation

Customer > Contact > Interactions

Prerequisites

None

Steps

1. Search for a contact using [Quick Find and Advanced Search](#).
2. To select the relationship details, click the relationship link.
3. Click **Interactions**.
4. Click a link to view details.

7.4.11 Sending Collateral from the Contact Summary Table

Navigation

Customer > Contact

Steps

Follow these steps to send collateral:

1. Select the contact's Collateral Recipient check box to send collateral to the contact or use the **Select All** button to send collateral to all contacts on the summary table.
2. Click **Send Collateral**.
3. You will be prompted to complete the fulfillment request.

7.5 Contact List Subtab

Sales people can generate contact lists to assist them in planning their sales calls. Contact lists can be generated on the basis of parameters, including contact profiles, relationships, addresses, and classification information. For example, a sales person could generate a list of all Vice Presidents of Sales in the insurance industry in the Northeastern United States. Users can manually add contacts, remove contacts, and save a list. Lists can be designated private or public.

There are two ways to create a contact list:

- [Section 7.5.1, "Creating a Contact List Using Filters"](#)
- [Section 7.5.2, "Creating a Contact List by Manually Adding Contacts"](#)

You can also perform the following functions from the Contact List subtab:

- [Section 7.5.3, "Saving a Contact List"](#)
- [Section 7.5.4, "Downloading a Contact List"](#)
- [Section 7.5.5, "Personalizing the Summary Table Display"](#)
- [Section 7.5.6, "Adding Additional Filters to a Contact List"](#)
- [Section 7.5.7, "Viewing List Filters"](#)
- [Section 7.5.8, "Manually Add a Contact to a List"](#)
- [Section 7.5.9, "Removing a Contact from a List"](#)
- [Section 7.5.10, "Removing a List"](#)
- [Section 7.5.11, "Call Sheet Overview"](#)
- [Section 7.5.12, "Generating a Call Sheet"](#)
- [Section 7.5.13, "Viewing Call Sheet Details"](#)
- [Section 7.5.14, "Sorting a Call Sheet"](#)
- [Section 7.5.15, "Selecting Multiple Contacts"](#)
- [Section 7.5.16, "Adding a Task"](#)
- [Section 7.5.17, "Viewing Calendar Tasks"](#)
- [Section 7.6.1, "Viewing the Customer Classification Report"](#)
- [Section 7.6.2, "Viewing the Task Classification Report"](#)

Related Profiles

OSO: Create a list with filter conditions: The site level default value is "No", which means that a contact list will be created manually by default. You can edit this profile from the Profiles > Customer.

7.5.1 Creating a Contact List Using Filters

Use the following procedure to create a contact list using filters.

Navigation

Customer > Contact List

Prerequisites

User must have access to existing contacts.

Steps

1. Click **Create Contact List**.
2. Enter the list's name.
3. Select the Public or Private radio button to indicate whether you want to create a private list or a public list that can be accessed by others.
4. Select the "Use Filters to Find Contacts" radio button.
5. Click **Create**.

This takes you to the filters section where you can enter certain criteria to create the contact list. The "List of Filters" page opens.

Use the following filter categories:

- a. **Contact** includes:
 - **General:** General information about the contact such as, name, date of birth, phone number.
 - **Relationship:** Information about the contacts relationships such as relationship type, role type, department.
 - **Address:** Contacts address such as city, state, country, or address status.
 - b. **Classification:** Information about the classification category that the contact has been identified as belonging to.
6. After you have selected the filters that you want to choose, click **Apply Filter**.

If you want to clear the filters you have selected, click **Restore**. To quit creating the list and return to the List Summary Page, click **Cancel**. Please note, once you have applied a set of filters, if you want to re-filter the list, you cannot use the same filters again. For example, if you filter a list based on sales teams, and then decide that you want to filter the list further. The sales team filters will not appear as an option for the additional filter.
 7. A list using the filters you have selected is returned.

7.5.2 Creating a Contact List by Manually Adding Contacts

Use the following procedure to create a contact list by manually adding contacts.

Navigation

Customer > Contact List

Prerequisites

User must have access to existing contacts.

Steps

1. Click **Create Contact List**.

A contact list page with no contacts opens. You can manually add contacts to the list here.

2. Select the "Manually Add Contacts" radio button.
3. Click **Create**.
4. In the "Add a Contact" field, enter the full or partial contact name using % as a wildcard.
5. Click **Go**.
6. From the search results, select the contact you want to add to the list.
7. Click **Select**.
8. Once you have added all the contacts that you want on the list, enter a name for the list.
9. Click **Save**.

7.5.3 Saving a Contact List

Navigation

Customer > Contact List

Steps

After you have selected and applied the filters, you have a couple of options in saving the contact list, **Save** or **Save As**.

- If you want to save the file as it is, click **Save**.

- If you want to save the file under a different name, enter the name in the Save As text field. Click **Save**.

Additionally, you can indicate whether the list is a public or private list by selecting the Public or Private radio button. A private list can only be viewed by the list creator. A public list is viewable by any person who has access to the contacts on the list. However, a public list cannot be changed by another user.

When you are saving contact lists, please note that the contact lists that you create (either public or private) must have unique names. However, another user can create a public contact list with the same name as your contact list.

7.5.4 Downloading a Contact List

You can download a contact list to a spreadsheet by clicking the **Download to CSV** icon next to the **Go** button.

7.5.5 Personalizing the Summary Table Display

You can personalize the way the summary table is displayed on the page by clicking the Personalize icon.

Navigation

Customer > Contact List

Steps

1. Click the **Personalize** icon.
The Personalize Contact List page opens.
2. Select the items you want to display on the page by moving Available Columns to the Display Columns area.
3. Select sorting options.
4. Enter the number of rows to display.
5. Click **Apply**.

7.5.6 Adding Additional Filters to a Contact List

After you have applied an initial set of filters and created a contact list, or you have created a contact list manually, you can add additional filters to the contact list to further narrow down the list.

Navigation

Customer > Contact List

Prerequisites

You must be the owner of the list in order to modify the list. If you are not the owner, the list you create will be a new list based on the existing list.

Steps

1. Click **Apply Filters**.

This takes you to the filters section where you can enter certain criteria to create the contact list. The "List of Filters" page opens.

Use the following filter categories:

a. **Contact** includes:

- **General:** General information about the contact such as, name, date of birth, phone number.
 - **Relationship:** Information about the contacts relationships such as relationship type, role type, department.
 - **Address:** Contacts address such as city, state, country, or address status.
- #### b. **Classification:** How all classifications you choose will be related to one another for the filter. How you want the classification criteria to be related to each other by selecting the "And Condition" or "Or Condition" radio button.

2. After you have selected the filters that you want to choose, click **Apply Filter**.

3. If you want to clear the filters you have selected, click **Restore**. To quit adding filters to the list and return to the Contact List Page, click **Cancel**.

7.5.7 Viewing List Filters

You can view the filters you have applied to a list two ways.

- From the summary table your saved lists are displayed. Click the **View** link under the List Filters column.
- After you have created a new list, you can view the filters from the contact list page by clicking the **List Properties** link. The view-only page shows the filters that you used for the list and the date the filters were applied.

7.5.8 Manually Add a Contact to a List

After you have created a contact list, you can manually add contacts to the list.

Navigation

Customer > Contact List

Prerequisites

You must be the owner of the list.

Steps

1. In the "Add a Contact" field, enter the name of the contact you want to add. Use the % as a wild card.
2. Click **Go**.
3. Select a contact from the search results.

7.5.9 Removing a Contact from a List

Navigation

Customer > Contact List

To remove a contact from a list, open the list from the summary table. Select the Remove check box and click **Update**.

7.5.10 Removing a List

Navigation

Customer > Contact List

To remove an entire list from your summary table, select the Remove check box. Click **Update**.

7.5.11 Call Sheet Overview

After you have created a list, you may want to generate a call sheet. A call sheet has additional information on your contacts which provides an interactive page.

Overview

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in your Contact List. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

From the contact list:

- [Section 7.5.12, "Generating a Call Sheet"](#)
- [Section 7.5.13, "Viewing Call Sheet Details"](#)
- [Section 7.5.14, "Sorting a Call Sheet"](#)
- [Section 7.5.15, "Selecting Multiple Contacts"](#)
- [Section 7.5.16, "Adding a Task"](#)
- [Section 7.5.17, "Viewing Calendar Tasks"](#)

7.5.12 Generating a Call Sheet

Prerequisites

None

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click the **Generate Call Sheet** button.

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken.

Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

7.5.13 Viewing Call Sheet Details

Prerequisites

None

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

The details you see are described in the following table:

Table 7-13 Call Sheet Fields

Field	Description
Select	To select the client for an action (send email, collateral, or add interaction), select the checkbox.
Priority	Indicates the priority given to the client.
Client/Contact	The client or contact name.
Title	The contact title.
Phone	Phone number
Email	Email address
Primary Address	Address
Country	Country
Comments	Comments
Calendar	Calendar

7.5.14 Sorting a Call Sheet

You can view the call sheet with the basic view which lists contacts grouped by client.

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps

This is the default view.

1. Select a contact list.
2. Click **Generate Call Sheet**.

7.5.15 Selecting Multiple Contacts

Prerequisites

None

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. To select multiple clients, select each client by choosing the Select check box in the first column of the client's row on the call sheet.

You can also use the "Select All" link to select all contacts on the current page or "Select None" link to select none, links at the bottom of the page.

7.5.16 Adding a Task

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps for Alternative 1

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Select the client by choosing the Select check box in the first column of the client's row on the call sheet.
4. From the drop down of the Select Client and Perform Action list, select Add Interaction.
5. Click **Go**.
6. Enter the information for the task you are creating. Most fields will default to match the settings you have already done. Required fields are indicated with an asterisk.
7. Click **Create**.

Create and Create Another button will commit changes in this window and forward this page to Create Task and Task Summary page for the user to create another task. You can click Clear to undo what you have entered, or Cancel to close this window without saving.

Steps for Alternative 2

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click the Edit icon on the call sheet.

Steps for Alternative 3

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click an icon on the weekly calendar on the call sheet.

7.5.17 Viewing Calendar Tasks

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Tasks are listed in the far right column with a check mark. To view, edit, or add a task, click the check mark, double check mark, or cross mark.
4. The Create Task page opens. At the bottom of the page, all tasks are listed with a link to the details.

7.6 Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab.

- [Section 7.6.1, "Viewing the Customer Classification Report"](#)
- [Section 7.6.2, "Viewing the Task Classification Report"](#)

7.6.1 Viewing the Customer Classification Report

This report will return all parties within the chosen party type that meet the classification criteria chosen.

Navigation

Customer > Reports > Customer Classification Report

Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding P or C to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.

6. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
7. Select your sorting options from the available drop down lists.
8. Click **Run Report**.

7.6.2 Viewing the Task Classification Report

This report will return all parties within the chosen party type and tasks associated with those parties that meet the classification criteria selected.

Navigation

Customer > Reports > Task Classification Report

Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding P or C to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.
6. Optionally, enter or select one or more of the following task filters:
 - a. Name
 - b. Number
 - c. Type
 - d. Date Range
 - e. Priority
 - f. Status
 - g. Include Private
7. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
8. Select your sorting options from the available drop down lists.
9. Click **Run Report**.

Please refer to the *Oracle Customer Intelligence* documentation for more information about these reports.

Partners, Service and My Company

The Partner tab provides for the entry and management of partner information. The Service tab give entry into Oracle iSupport and the My Company tab, viewable by a partner only, allows partners to view the information related to their organization.

8.1 Partner Tab

Use the Partner tab to view Sales partners and Exchange partners by selecting from the View By drop down list and clicking Apply.

- [Create a Partner](#)
- [Create a Person/Contact](#)
- [Adding Partner Profile](#)

8.1.1 Create a Partner

Prerequisites

None

Steps

Follow these steps to create a partner:

1. From the **Partner** tab, click **Create**.

The Create Partner page opens.

The following table describes the Create Partner fields.

Table 8–1 Create Partner Fields

Field	Required Field	Description
Find Organization	No	Find an organization by entering a name, selecting a state and clicking Go .
Organization	Yes	Enter the organization.
Alias	No	Enter an alias, if applicable.
Phone Number	No	Enter a phone number.
Phone Type	No	Select a phone type from the drop down list.
Email Address	No	Enter an email address.
Customer Category	No	Select a customer category code from the drop down list.
Annual Revenue	No	Select an annual revenue currency from the drop down list and enter the annual revenue.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year established.
Web Site	No	Enter the web site address.
Do Not Mail	No	Select the do not mail check box if the partner should not receive mail.
Business Line	No	Enter the business line.
SIC Code	No	Enter the Standard Industry Code.
DUNS Number	No	Enter the Dunn and Bradstreet number.
Tax ID	No	Enter the tax identification number.

To enter partner details, use the following table to identify the Partner Detail fields.

Table 8–2 Partner Detail Fields

Field	Required Field	Description
Relationship Type	No	Select the relationship type from the drop down list.

Table 8–2 Partner Detail Fields

Field	Required Field	Description
Purchase Method	No	Select the purchase method from the drop down list.
Target Revenue	No	Select a currency from the drop down list and enter the target revenue.
Channel Manager Name	No	Enter the full or partial name and click Go .
Phone Support Person	No	Enter the full or partial name and click Go .

If you want to enter Address information, the following table describes the Address fields.

Table 8–3 Address Fields

Field	Required Field	Description
Address Type	Yes	Select an address type from the list of values.
Primary	No	Select the primary check box if the address is considered the primary address.
Address Line 1	Yes	Enter the address.
Address Line 2	No	Enter additional address information.
Address Line 3	No	Enter additional address information.
Address Line 4	No	Enter additional address information.
County	No	Enter the county.
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.
City	No	Enter in the city field.
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
Country	Yes	Select country from the drop down list.

Table 8–3 Address Fields

Field	Required Field	Description
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

If you want to add a Person Relationship, the following table describes the Person Relationship fields.

Table 8–4 Partner Relationship Fields

Field	Required Field	Description
Add a Person	Yes	If you are going to add a person relationship, enter the full or partial name and click the Go button.
Erase	No	To erase a relationship from the summary table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.
Last Name	Yes	Enter the last name.
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Addressbook	No	Select an email address by clicking the email address book icon.
Job Title	No	Enter a job title.
Decision Maker	No	Select the decision maker check box if the person is a decision maker.

If you want to add an Organization Relationship, the following table describes the Organization Relationship fields.

Table 8–5 Organization Relationship Fields

Field	Required Field	Description
Add an Organization	Yes	If you are going to add an organization relationship, enter the full or partial name and click Go .

Table 8–5 Organization Relationship Fields

Field	Required Field	Description
Erase	No	To erase a relationship from the summary table, click the erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Related Organization	Yes	This field holds the name of the related organization.
Start Date	Yes	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

2. Click **Create**.

8.1.2 Create a Person/Contact

Prerequisites

None

Steps

Follow these steps to create a contact:

1. From the **Partner** tab, click the **Person** subtab.

From this page you can create new contacts, send collateral to existing contacts, or update contact information.

2. Click **Create**.

The Create Person page opens.

3. The only required fields are Last Name and First Name, indicated with an asterisk.

The following table describes each field in the Create Person page.

Table 8–6 Create Person Fields

Field	Required Field	Description
Last Name	Yes	Enter the last name.

Table 8–6 Create Person Fields

Field	Required Field	Description
First Name	Yes	Enter the first name.
Preferred Name	No	Enter a preferred name, if applicable.
Title	No	Select a title from the drop down list.
Suffix	No	Enter a suffix, if applicable.
Gender	No	Select a gender from the drop down list.
Status	No	Select a status from the drop down list.
Phonetic Last Name	No	Enter the phonetic last name.
Phonetic First Name	No	Enter the phonetic first name.
Middle Name	No	Enter the middle name.
Second Title	No	Enter the second title, if applicable.
Date of Birth	No	Select a date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.

4. In the Business Information section, you can enter information which is described in the following table:

Table 8–7 Create Person Fields

Field	Required Field	Description
Relationship	No	Select a relationship from the drop down list.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking Go .
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.
Role	No	Select a role from the drop down list.
Business Phone Book	No	Select a phone number from the party list by clicking the phonebook icon.

Table 8–7 Create Person Fields

Field	Required Field	Description
Start Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Select the check box to indicate that the person is a decision maker.
Reference	No	Select the check box to indicate the person can be considered a reference.
Do Not Mail	No	Select the check box to indicate that no mail is to be sent.
Organization	No	Enter the full or partial name and click Go .
Mail stop	No	Enter the mail stop.
Department Type	No	Select department type from the drop down list.
Job Title Type	No	Select job title type from the drop down list.
Preferred Language	No	Default is English. Select from the drop down list.
Business Email Addressbook	No	Select
End Date	No	

If you want to add personal information, the following table describes the Personal Information fields.

Table 8–8 Personal Information Fields

Field	Required Field	Description
Personal Phone Book	No	Select a phone number from the phone book by clicking the phonebook icon.
Address Type	Yes	Select an address type from the list of values.
Address Line 1	Yes	Enter the address.
Address Line 2	No	Enter additional address information.
Address Line 3	No	Enter additional address information.
Address Line 4	No	Enter additional address information.
County	No	Enter the county.

Table 8–8 Personal Information Fields

Field	Required Field	Description
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.
Personal Email Address Book	No	Select an email address by clicking the icon.
City	No	Enter in the city field.
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
Country	Yes	Select country from the drop down list.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

5. In the Notes sections, you can enter notes associated with this person.
 - Select the note type from the drop down list.
 - Enter text in the Text box.
 - Click **Create**.

You have successfully created a person when the Person Detail Main page opens.

6. Click **Create**.

To find more information about partners, refer to the *Oracle Partners Online Users Guide* guide.

8.1.3 Adding Partner Profile

Prerequisites

Log in as Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Attribute Link for a Particular Partner

Steps

1. Select a profile Attribute from a drop down list.
2. Select a value from a list of available choices.
3. Click Update.
4. Repeat steps one and two to defined additional profile attributes.
5. Click Update.

Guidelines:

When attributes are associated for a particular Partner on the user interface, the concurrent program PV- Refresh Attribute Text table must be run, so that this data becomes available to the Partner Matching program.

8.2 Service Tab

Oracle Partners Online Service tab consists of three subtabs:

- **Ask Me**
- **View/Update Service Request**
- **Create Request**

For further information of using the Service request tab in Oracle Partners Online, please refer to *Oracle iSupport Concepts and Procedures Guide*.

8.3 My Company Tab

The My Company tab allows the Partner to view information specific to their company.

- [Viewing My Company's Main Details](#)
- [Viewing My Contacts](#)

8.3.1 Viewing My Company's Main Details

Use this page to see details of your company, if you work for a Partner organization: annual revenue, total employees, business category, addresses and other identifying information.

Use the following procedures to view My Company's main details.

Prerequisites

Login as a Partner, Vendor or VAD User/Administrator and navigate to the following

My Company > Organization Subtab > Organizations Details-Main Link

To view more specific details about the organization, click the appropriate link

8.3.2 Viewing My Contacts

Use this page to view profiles of Partner contacts. Click links to see more detail about specific sales representatives. Only the main business-related details are supplied.

Use the following procedures to view My Contacts.

Prerequisites

Login as a Partner User/Administrator or VAD User/Administrator and navigate to the following

My Company > Person Subtab > Specific Person Link > Person Detail-Main Link

8.4 Encyclopedia Tab

Oracle Partners Online's Encyclopedia tab includes four subtabs; Category, My Channels, Publish, and Administration.

Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories.

Channels can be classified as content or group and their access can be set to public or private. If you do not know the correct channel to use when publishing a document, then MES assigns the document to the correct channel by matching the document attributes to the channel attributes.

For more detailed information on using Marketing Encyclopedia System, please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures Guide*.

A

Acronyms

This appendix provides a list of acronyms used throughout this Guide. For additional information please see the Glossary in Appendix B.

PV	Prefix associated with Oracle Partners Online.
AP	Accounts Payable.
AR	Accounts Receivables.
CRM	Customer Relationship Management.
DBA	Database Administrator. The person within an organization primarily responsible for the deployment and maintenance of an Oracle database product.
ERP	Enterprise Resource Planning.
GL	General Ledger.
GUI	Graphical User Interface.
HTML	HyperText Markup Language.
HR	Human Resources.
HRMS	Human Resources Management System.
JRE	Java Runtime Environment.
JSP	Java Server Page.
JTF	CRM Foundation modules.
LOV	The List of Values is a list that appears in various drop-down fields within OMO. These List of Values can be predefined or created from user entered information.

MES	Marketing Encyclopedia System.
OPO	Oracle Partners Online.
OSO	Oracle Sales Online.
OTS	Oracle TeleSales.
PIN	Personal Identification Number.
SIC	Standard Industry Code.
SQL	Structured Query Language. Used to query databases.
TCA	Trading Community Architecture. Oracle's single customer database architecture for all types of customers.
UI	User Interface.
UOM	Unit of Measure.
URL	Universal Resource Locator is the full name or path of a web page or file location.

Glossary of Terms

This appendix provides a Glossary of Terms used throughout this guide.

Campaign

A marketing effort comprising any number of different techniques for reaching Customers or Prospects.

Customer

A prior purchaser of products or services.

Geography

Used to define the geographical breakdown and hierarchy used by an organization.

Interaction

A touchpoint with a customer or potential customer. Interactions may be recorded in Oracle Interaction History.

Home

The Home tab is the first tab the user sees when they log onto Partners Online. The Home tab contains a number of bins and available reports as well as links in certain bins to recently accessed marketing objects.

Link

A hyperlink to another Page.

Multi Org

Used to describe the capacities of Oracle products to accommodate multiple organizations in multiple countries with differing currencies and languages.

Note

A note may be attached to almost any marketing object for many different purposes. Notes, once attached, are not deleteable.

Note Type

These are organization-defined types to used to categorize notes.

Owner

The owner of an Object.

Page

A HTML page viewed in a browser.

Personalize

A function that allows a user to customize many different pages to accommodate his specific needs.

Product Family

Prospects

Prospective customers who have not previously purchased products or services.

Record

A collection of related Fields. All of the fields in a Record contain data relating to a single item.

Status

Statuses are assigned to various marketing objects to let users and the system know the state of the object. Changes in status may be affected by the user or may be affected by the system, particularly those status changes requiring approval.

Structured Query Language (SQL)

Sometimes pronounced "Sequel", Structured Query Language is a standard for querying, or asking questions of, a database.

Subtab

Some tabs have further divisions called subtabs. Subtabs, if any, are displayed horizontally underneath the tabs.

Summary Page

Summary pages, which are a list of marketing objects, appear under many tabs and subtabs. To view a marketing object's details, click the object's name.

Tab

Main divisions within the user interface of Oracle Partners Online.

TCA or Trading Community Architecture

Oracle's single customer database architecture for all types of customers.

