

**Oracle® Sales Offline**

User Guide

Release 11*i*

**Part No. B14391-01**

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Oracle Sales Offline User Guide, Release 11i

Part No. B14391-01

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## **Oracle Sales Offline User Guide, Release 11i**

**Part No. B14391-01**

Oracle 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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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

## Intended Audience

Welcome to Release 11*i* of the Oracle Sales Offline User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Sales Offline
- Oracle Field Sales (formerly known as Oracle Sales Online)
- 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 Sales Offline.

- Chapter 1 provides an introduction to Oracle Sales Offline.
- Chapter 2 provides information on creating and updating a task.
- Chapter 3 provides information on creating and updating leads.
- Chapter 4 provides information on creating and updating opportunities.
- Chapter 5 provides information on creating and updating quotes.

- Chapter 6 provides information on creating and updating forecasts.
- Chapter 7 provides information on creating and updating customers.

## Documentation Accessibility

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## 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 Sales Offline.

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

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>.

## **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 Sales Offline (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 Applications" from any Oracle Applications help file.

## **Documents Related to This Product**

### **Oracle Sales Offline Implementation Guide**

This guide provides how to implement and manage Oracle Sales Offline.

### **Oracle Field Sales User's Guide**

This guide explains Oracle Field Sales, an HTML-based applications that provides sales managers, sales representatives, and sales executives with assistance in managing their business opportunities, customer, forecasting, incentive compensation, partners, and quotes.

### **Oracle Quoting User Guide**

This guide explains how to use Oracle Quoting to create and manage customer quotes across all sales and interaction channels. Oracle Quoting is used to propose product solutions and perform negotiations, while enforcing consistent business

rules throughout the sales cycle. Users can publish and print quotes, and eventually convert quotes to orders.

## **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 Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

### **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

### **Maintaining Oracle Applications**

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

### **Oracle Applications System Administrator's Guide**

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

### **Oracle Alert User's Guide**

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

### **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

### **Oracle Applications User Interface Standards for Forms-Based Products**

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle Sales Offline implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

### **Oracle CRM Application Foundation Implementation Guide**

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

## **Training and Support**

### **Training**

Oracle offers training courses to help you and your staff master Oracle Sales Offline 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 Sales Offline 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.

## **OracleMetaLink**

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink 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 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.



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# Introduction to Oracle Sales Offline

This chapter discusses the key features and functionality of Oracle Sales Offline. Sections in this chapter include:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Sales Offline Prerequisites"](#)
- [Section 1.3, "Oracle Sales Offline Key Features"](#)
- [Section 1.4, "Oracle Sales Offline Integrations"](#)
- [Section 1.5, "Accessing Oracle Sales Offline"](#)
- [Section 1.6, "Navigating within Oracle Sales Offline"](#)
- [Section 1.7, "Setting Synchronization Preferences"](#)
- [Section 1.8, "Synchronizing Data"](#)
- [Section 1.9, "Conflict Resolution"](#)
- [Section 1.10, "Timing Log"](#)
- [Section 1.11, "Version Identification in Oracle Sales Offline"](#)
- [Section 1.12, "Status Bar Messages"](#)

## 1.1 Overview

Oracle Sales Offline gives you the information you need to remotely manage your sales efforts, and offers sales organizations the functionality required in an interface that is both familiar and effective. Leveraging the capabilities of desktop applications, Oracle has designed a template that provides sales organizations a way to manage sales information without the need to install additional software. The template is downloaded from Oracle Field Sales and provides

upload/download data capabilities. Oracle Sales Offline provides you with the ability to view and edit sales information, while your support organization does not have to support any additional technical software on laptops.

To manage and close deals successfully, sales teams often cross group boundaries, territories and even company lines. Oracle Sales Offline works with Oracle Field Sales and Oracle Telesales to create a virtual sales team that enables the sharing of opportunities, contacts, notes, and other customer information between sales team members. Opportunities can be automatically or manually assigned to sales members. Sales representatives are able to see information from partners about their accounts as they prepare for on site meetings. Oracle's sales automation modules complement each other and provide the solution for team selling in a dynamic environment.

Oracle Sales Offline imports and exports (synchronizes) information from an Oracle enterprise database, and enables you to view and update your sales information remotely via your laptop computer. You can add, view and edit customers, opportunities, leads, quotes, and forecasts from your laptop, saving the changes for subsequent upload.

You can optimize your selling time in the field by having key customer information readily available. This enhances your relationships with customers and promotes company profitability. Oracle Sales Offline integrates with the Oracle Sales applications, and is designed to maximize sales effectiveness in the mobile environment. Oracle Sales Offline is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

## 1.2 Sales Offline Prerequisites

The prerequisites for Oracle Sales Offline are:

### **Oracle Applications**

- Oracle Field Sales, minimum version required is 11.5.7 (also known as Oracle Sales Online)
- Oracle Quoting, minimum version required is 11.5.7 (if you will be using offline quoting)
- Oracle Quoting patch for seeding status
- Oracle Web Applications Desktop Integrator

**Desktop Requirements**

- Windows 98/NT/2000/XP operating system
- Microsoft Excel 2000, XP
- Licensed copy of WinZip

**Desktop Recommendations**

- 500 mHz or higher processor
- 256 mb RAM or higher

## 1.3 Oracle Sales Offline Key Features

Oracle Sales Offline includes the following features:

- [Lead Management](#)
- [Opportunity Management](#)
- [Sales Forecasting](#)
- [Offline Quoting](#)
- [Task Management](#)
- [Flexfield Support](#)
- [Home Tab - New Items and Conflict Resolution](#)
- [Incremental Synchronization](#)
- [Synchronization Preferences Filters](#)
- [Upload MyChanges Synchronization](#)
- [Multilanguage Support \(MLS\)](#)
- [Common Product Catalog](#)

**Lead Management**

You can manage leads and qualify them into sales opportunities in Oracle Sales Offline. Leads can be prioritized so that you can target activities on hot leads first. Oracle Sales Offline gives you access to lead information such as notes history, and key contacts. All changes to the lead can be synchronized back to the enterprise database. Also, you can perform the lead to opportunity business flow in Sales Offline.

## **Opportunity Management**

You can manage opportunities remotely through the sales cycle. Oracle Sales Offline gives you access to opportunity activities and statuses, notes history, key contacts and sales credits. You can create and update the opportunity information by adding new notes, and changing the opportunity status. Access to this information and the ability to update it enables sales organizations to sell more effectively. Sales team members can share information about call activity, major issues, and account strategy. All changes to the opportunity can be synchronized back to the enterprise database. Also, you can perform the opportunity to quote business flow in Sales Offline.

## **Sales Forecasting**

Oracle Sales Offline enables you to build forecasts constructed from opportunities. Sales forecasts can be updated on the road, and forecast commitments can be synchronized back to the enterprise database to be viewed by sales managers.

## **Offline Quoting**

Oracle Sales Offline supports mobile quoting functionality. The quoting functionality enables you to maintain and develop customer quotes. You can view detailed quote information, such as customer account information, contact details, and ship-to and bill-to information. Products can be added, removed, and priced using offline quoting. Manual price adjustments can be performed at the product line level. All changes to the quote can be synchronized back to the enterprise database. You can generate quotes to view and edit at a customer site.

## **Task Management**

Sales Offline supports task management features. You can download tasks that are assigned to you, or that you own. These tasks can be viewed and edited in Sales Offline, and you also have the ability to create new tasks. Tasks can be stand-alone, or associated to an Oracle business object. You have the ability to display tasks for a particular day or date range in Sales Offline using the Daily Task summary form.

## **Flexfield Support**

Sales Offline supports customer defined flexfields, where applicable. Flexfields established in the online sales applications can be downloaded for use in Sales Offline. You can add, view, and edit data captured in these flexfields, and have the data synchronized to and from the online sales applications.

## Home Tab - New Items and Conflict Resolution

The Home Tab of Oracle Sales Offline is the first window you see in the application, and lists newly added or changed records during the last synchronization. Initially, the Home tab will not list any records. New or changed items are listed as the result of subsequent synchronizations. Records are listed in the various tables, depending on the source of the record.

The Conflict Resolution subtab is available in the Home Tab. The conflict resolution sheet displays conflicted records that occurred during synchronization, and provides a side-by-side comparison of the local client record and the associated server record. You can reapply or discard the conflict records directly through Oracle Sales Offline.

## Incremental Synchronization

Oracle Sales Offline supports incremental synchronization for uploading and downloading sales data. After the initial installation, only the records that have been changed or added in Oracle Sales Offline are uploaded during synchronization, and only the records that have been added or changed in the online applications are downloaded.

## Synchronization Preferences Filters

The Synchronization Preferences allows you to selectively download sales data and filter data based on Oracle business objects such as, organizations, leads and opportunities. These download options can be saved and edited.

## Upload MyChanges Synchronization

Oracle Sales Offline supports the Upload MyChanges synchronization for uploading sales data. If this option is selected, only the records that have been changed or added in Oracle Sales Offline are uploaded during synchronization. Upload exceptions for an Upload MyChanges synchronization are flexfield information, profiles, and quote addresses. Records that have been added or changed in the online applications will not be downloaded.

## Multilanguage Support (MLS)

Oracle Sales Offline is MLS compliant. Multilanguage Support includes:

- **Language Data Handling:** Support for characters from any language as data in the application.
- **Locale Formatting:** Support for local formats for date, time, number, address, and name.

- **Search and Sort:** Support for locale-specific searching and sorting.

### **Common Product Catalog**

Oracle Sales Offline supports the common product catalog, which is used by all Sales applications. In the past, product categories were limited to interest type, primary codes, and secondary codes. Using the common product catalog, multiple levels of product categories are possible based on implementation needs. Product catalog security is inherited from the security set in Oracle Field Sales.

The common product catalog is part of Oracle Product Lifecycle Management and manages product hierarchy. Your product catalog is set up in Oracle Product Lifecycle Management. A hierarchical catalog called Product is seeded for use by Sales and Marketing. You can either use this seeded catalog or create a new product hierarchical catalog with Product Categories. See the *Oracle Product Lifecycle Management Administrators Guide* for details.

## **1.4 Oracle Sales Offline Integrations**

Oracle Sales Offline integrates with:

- **Oracle Field Sales:** Oracle Field Sales is an application designed for field sales representatives, sales managers, and executives. This application provides a complete set of tools that enables sales teams to manage the sales cycle from beginning to end.
- **Oracle Quoting:** Oracle Quoting is used to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle. Users can publish and print quotes, and eventually convert quotes to orders. This integration applies only if offline quoting is used in Oracle Sales Offline.

## **1.5 Accessing Oracle Sales Offline**

Oracle Sales Offline is available from the Mobile tab in Field Sales, in the form of a compressed file.

### **Reference**

*Oracle Sales Offline Implementation Guide*

### **Login**

Log in to Oracle Applications to access Field Sales.

## Responsibility

Sales Online Administrator

## Navigation

Mobile > Download Sales Offline Template

## Steps

If you are a first-time-user, you must download Oracle Sales Offline from Oracle Field Sales before proceeding.

To download Oracle Sales Offline:

1. Log into Oracle Field Sales.
2. Click the Mobile tab.
3. Create a new folder in your directory.
4. Download Oracle Sales Offline by clicking the Download Sales Offline Template link.
5. Navigate to the downloaded file SalesOffline.zip in your directory.
6. Unzip the file into your folder.
7. Run Oracle Sales Offline by double-clicking on SalesOffline.xls.
8. Enable macros when prompted. If Oracle Sales Offline fails to open when you choose to enable the macros, check to ensure that the macros security is set to the medium or low level. You can do this by navigating to Tools > Macro > Security in Excel 2000.
9. Click the Sync icon.
10. Enter the requested user information and then click **Sync**. The synchronization preferences will display the first time you Sync.
11. Enter the download criteria by choosing the [Territory Driven Download](#), [Sales Team Driven Download](#), or [Forecast Driven Download](#).

You can filter your data using the Sync preference filters associated with the downloads. See [Setting Synchronization Preferences](#) for details. These preferences can be saved for use in future synchronizations.

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**Note:** Not all synchronization preferences filters are applicable to the Territory Driven Download.

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These are the Sync preference filters which are applicable to Territory Driven and Sales Team Driven downloads:

- **Lead Preferences** - can be filtered by Status, Channel, Lead Rank, Budget Status, Time Frame, or Number of Records
- **Opportunity Preferences** - can be filtered by Status, Sales Stage, Sales Channel, or Win Probability (from/to)
- **Quote Preferences** - can be filtered by Inventory Category Set (Default Category Set, or the Sales and Marketing Category Set), Inventory Category, or Price List

You must select items (from the Default Category Set, the Sales and Marketing Category Set, or the Price List) for download. You can select items from multiple categories. Multiple items can be selected by highlighting a row and using the Ctrl or Shift functions.

- **Forecast Preferences** - can be filtered by Period Type, Category, Start Period and End Period, or Credit Type
- **Customer Preferences** - can be filtered by Customer Category, or Country

## 1.5.1 Territory Driven Download

The Territory Driven download provides additional functionality to that provided by the Sales Team Driven download by enabling you to limit the downloaded address and contact data to that pertaining to your sales territory. This is of benefit in that the user is able to download a smaller quantity of data, which is more relevant to their day to day sales activities. Sales territories are established using Territory Manager. Manual Territory Location assignment can also be performed in Oracle Field Sales.

The Territory Driven Download accounts for only the address-specific qualifiers, such as postal code. It does not take into account territory qualifiers, such as named accounts. If you use the Oracle Territory Manager assignment process, the territory address qualifiers must be established before this synchronization option can be used effectively. You can also manually assign a sales user to a certain Oracle business object. Manual assignments will also be synchronized by Oracle Sales Offline using the Territory Driven Download.

Only addresses associated to your territory are available under an Organization or Person. You may not be able to download or view all addresses associated to an Organization or Person.

This is how the Territory Driven downloads affect Oracle business objects available in Oracle Sales Offline:

**Organization and Persons:** The Territory Driven Download will download only Customers, which have an address that resides within a sales representatives established sales territory via an established address qualifier. The Territory Driven Download will download only Contacts related to an Organization, which have an address that resides within a sales representatives established sales territory.

**Opportunity:** If a Oracle Sales Offline user is on the sales team (automatically assigned via territory or manually assigned) for an Opportunity, the Opportunity is synchronized to Oracle Sales Offline.

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**Note:** Only Opportunity contacts which reside in the Oracle Sales Offline users territory are downloaded with the Opportunity. Contacts, associated to the Opportunity, that do not have addresses associated with the Oracle Sales Offline users territory will not get downloaded or viewed in Oracle Sales Offline.

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**Lead:** If a Oracle Sales Offline user is on the sales team (automatically assigned via territory or manually assigned) for a Lead, the Lead is synchronized to Oracle Sales Offline.

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**Note:** Only Lead contacts which reside in the Oracle Sales Offline users established territory are downloaded with the Lead. Contacts, associated to the Lead, that do not have addresses associated with the Oracle Sales Offline users territory will not get downloaded or viewed in Oracle Sales Offline.

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The Territory Driven Download does not affect the Task or Quote synchronization method. If you are on the sales team of a Quote (regardless of Territory information), the Quote is synchronized to Oracle Sales Offline. If you own or are assigned a Task, the Task is synchronized to Oracle Sales Offline.

## 1.5.2 Sales Team Driven Download

The Sales Team Driven download will result in records based on your sales team access. If you are on the sales team of an Oracle business object (for example, organization, lead, or opportunity) these records are downloaded to Oracle Sales Offline.

### 1.5.3 Forecast Driven Download

The Forecast Driven download of data is based on the opportunities that are open within the forecast range selected. Customer organizations and contacts that are associated with the opportunities are downloaded.

## 1.6 Navigating within Oracle Sales Offline

In Oracle Sales Offline, tabs indicate the first layer of information and subtabs show further details. Links enable you to access detailed information about specific items.

The following table describes navigation features and fields:

**Table 1–1** *Navigation in Oracle Sales Offline*

<b>Navigation Feature</b>	<b>Description</b>
Tab	Enables you to navigate among the areas of functionality in the application.
Subtab	Enables you to access further functionality under a tab.
Link or hyperlink	Enables you to navigate to further levels of detail under the subtab.
Asterisks	Designate required fields. These fields have a white background. Fields with a white background and no asterisk are optional. Fields with a grey background are read-only.
Column headings	Enables you to sort rows of information. Clicking on a column heading will sort rows in ascending or descending order based on the information in the selected column.
Go button	Enables searches for a list of values.
Ctrl F	Enables you to search for a specific value.

## 1.7 Setting Synchronization Preferences

Oracle Sales Offline enables you to select preferences for synchronization. These preferences apply to the data downloaded from Oracle Field Sales. During the initial synchronization, Oracle Sales Offline will by default perform a full download of necessary data. Using preferences to select subsets of data to download can

contribute to improved application performance. You can modify these preferences after making your initial choices.

### Steps

1. In Oracle Sales Offline, click the Profile icon.
2. Make your synchronization selection.
3. Click **Save** to save changes or **Sync** to start the synchronization process (which will save changes on completion).

## 1.8 Synchronizing Data

The Oracle Sales Offline synchronization process uploads changes or additions to the server and downloads changed or added records back to Oracle Sales Offline on your laptop. You do not have to log into Oracle Field Sales to upload and download data. The synchronization function handles this process within Oracle Sales Offline. See [Setting Synchronization Preferences](#) for details on changing data synchronization preferences for your data downloads.

### Steps

To synchronize data:

1. In Oracle Sales Offline, click the Sync icon.
2. The Sync Login window appears. Enter your user name and password.

**Upload MyChanges** - Selecting this checkbox allows you to upload only data added or modified in Oracle Sales Offline. It is recommended that you perform a full synchronization after downloading a new Oracle Sales Offline template, not an Upload MyChanges synchronization.

The Upload MyChanges synchronization differs from the incremental or full synchronization processes in that there are no downloads of additions or changes to server data. The Upload MyChanges synchronization is only available if you have modified or created records. The Upload MyChanges checkbox is disabled if you have made no changes or another synchronization is process.

3. Click **OK**. The Sync Console appears. A status bar shows the progress of the synchronization. While the synchronization is in progress, you can:

- **Go Offline** - Click to go offline while synchronization is in progress.

**Note:** To disable the saving of your Sync Preferences, navigate to Oracle > Go Offline Autosave, and disable the autosave.

Go Offline enables you to use Oracle Sales Offline in a read-only (locked) mode while synchronization halts in the background. No changes that you make while Oracle Sales Offline is in locked mode are saved. Data synchronization must complete before you can create, modify, or save data in Oracle Sales Offline. Go Offline is not available during some parts of the synchronization. For example, you cannot choose Go Offline when the synchronization engine is downloading data.

If you click the Sync button, or attempt to save data while the synchronization is offline in locked mode, you will receive this message:

**Sync and Save disabled while in locked mode.**

The buttons on the tabs (for example, Task or Lead) are not disabled (greyed out) while Oracle Sales Offline is in locked mode. However the functionality associated with these buttons is disabled.

To view the progress of the synchronization while in locked mode, close the worksheet, and then reopen it. When you reopen it, you will receive this message:

**Do you want to complete the unfinished sync?**

and have these choices:

- **Yes** - continues the synchronization. You will have to provide a login password. The Sync Console will appear and display the synchronization status bar.
- **No** - enables you to remain in the offline (locked) mode
- **Cancel Sync** - Click to cancel the synchronization that is in progress. This button is functional at the beginning of the synchronization. As the synchronization progresses, you eventually will not be able to cancel, and this button is disabled. The Cancel button is disabled when the synchronization process is writing to the enterprise database, to protect the integrity of the database.

- **Show or Hide Details** - Click **Show** to expand the Sync Console and show synchronization processing messages. These messages are similar to a log file. Click **Hide** to hide the processing messages.
4. You will receive a message at the end of the synchronization process informing you that the synchronization was successful or if there were conflict errors.
    - a. If you receive conflict errors, navigate to the Home tab and click the Conflict Resolution subtab to resolve the conflicts in the Conflict Resolution screens (see [Section 1.9, "Conflict Resolution"](#)).
    - b. If you receive a server not found and not available error, contact your administrator for assistance.
  5. At the successful end of the synchronization, you will see a message that the synchronization is complete, and another message recommending that you save your data. Click **Yes** to save or click **No** to cancel the save.

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**Note:** It is strongly recommended that you save your data after the synchronization completes.

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## 1.9 Conflict Resolution

Using a remote application that synchronizes information with an enterprise database can result in data conflicts. Conflict resolution is critical to using a remote application successfully, and it is important that up-to-date and accurate information is written to the enterprise database.

It is important to note that the server record will always override your Oracle Sales Offline client record. If the same server and client record has been changed in between synchronization processes, a conflict will occur, and the server record will override your client record. The conflict can be resolved in the Home tab, using the Conflict Resolution subtab.

During a full and incremental synchronization, all conflicts associated with a particular user are downloaded. In order to minimize the data downloaded, during an Upload MyChanges synchronization, only conflicts created during a particular Upload MyChanges synchronization are retrieved. While you can reapply or discard conflicts after performing an Upload MyChanges synchronization, you cannot view the online record associated with that conflict. Error messages are available to indicate the cause of the conflict.

## Steps

To resolve conflicts between the Oracle Field Sales database and Oracle Sales Offline:

1. Open Oracle Sales Offline.
2. Click the Conflict Resolution subtab in the Home tab.
3. In the Conflict Resolution screen, you will see tables listing the conflicts that occurred during synchronization.
4. Click the link to see details of the conflicted record and make the necessary updates before deciding to apply the changes or discard them.

On the left side of the form is your local Oracle Sales Offline record. On the right side of the form is the Oracle Field Sales server record. The fields that caused the conflict are shown in red.

If you choose Reapply, the Oracle Sales Offline record will override the Oracle Field Sales record. You must perform a synchronization for your record to be applied to the database. If you choose Discard, your Oracle Sales Offline changes will not be applied to the Oracle Field Sales server. If you discard the conflicts you do not need to perform a synchronization.

5. From the main Conflict Resolution screen you can select groups of conflicted records to Reapply or Discard. Select the checkbox by the record(s) you want to reapply or discard. If you want to reapply your changes to the server, click **Reapply**. If you want to discard the conflict, click **Discard**.

### 1.9.1 Non-Validated Records (Rejected Records)

You can view rejected records in Oracle Sales Offline, as well as a message indicating why the record was rejected. Any record that is created in Oracle Sales Offline and does not pass the online validation rules during the upload-synchronization process is captured in a Non-Validated record table in the Home tab of Oracle Sales Offline. The non-validated records table displays each record that did not pass the server validation rules, the reason why the record did not get applied to the server, and allows you to rectify (Reapply, Discard or Cancel) the non-validated record.

The table contains two columns, Non-Validated Records and Sync Time. The Non-Validated Records column contains the record name with hyperlink. The Sync Time column contains the server date stamp for the non-validated record's synchronization.

The most recent non-validated records are listed at the beginning of the table. If a non-validated record is a header record, then any accompanying line records are grouped together in the table, with the header record listed above the line records.

If the rejected records are related (for example, an opportunity header item and the related opportunity lines), then these records are grouped together in the non-validated table. If a header record results in a conflict, it is the first item in the grouped records, followed by the related line items.

Both rejected header and lines records are listed. Click the identifying text for the rejected record and activate the hyperlink that will generate the conflict resolution details form. You can read the resulting error message, determine the details of the conflict record, and then choose what action to take (either Reapply or Discard) for the non-validated conflict record.

### 1.9.1.1 Failed Quote Header and Line Records

Quote records with conflicts are grouped in the list of Non-Validated Records on the Home page of Oracle Sales Offline. Quote headers that fail validation are hyperlinked to the Conflict Resolution form, with no associated quote lines listed. Quote headers that pass validation, but have associated quote lines that fail will be listed with those failed lines hyperlinked to the Conflict Resolution form.

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**Note:** Quote header flexfields are not supported in this release.

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If the quote header contains the conflict, the quote will not be included in the list of Quote Names shown on the Quote tab until the conflict is resolved. Quotes with conflicts in the quote lines will be listed in the Quote Names list on the Quote tab.

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**Note:** Oracle Field Sales users cannot transform a quote into an order when one or more lines in the quote are in a conflict state. The exception to this is the conflict status Stale Records.

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The Oracle Sales Offline Error status appears in the Status field on the General tab of the Quote Details window when a quote has a conflict in the quote lines that must be resolved in Oracle Sales Offline. Until the conflict in the quote lines is resolved, the quote is in a read-only status, meaning that no part of it can be

updated, with the exception of Tasks. All buttons are disabled at this point, with the exception of Cancel.

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**Note:** There is no status transition during the quote approval process. Quotes with statuses such as contract required, approval pending, contract pending, and order submitted will retain the current status. However, you may still have Sales Offline errors, so verify the status of the quote.

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In Oracle Field Sales, you can update the Tasks and Notes for this quote, but it will otherwise be in the read-only state until the conflict in the quote lines is resolved.

#### **If you choose to Reapply a header record**

This message will appear:

**Are you sure you wish to reapply this record? If you choose to reapply this non-validated record, you must perform a synchronization operation for the record to be applied to the online server applications. This record, and all its associated line items, if applicable, will be applied to the online server applications.**

Click **OK** or **CANCEL**. If you choose Cancel, there is no further action.

If you clicked OK, the header record is removed from the non-validated table, a row is inserted into the appropriate summary sheet (depending on the source of the record), and the record is queued for synchronization.

If the header record has related line records, the associated records will also be removed from the non-validated table.

#### **If you choose to Reapply a line record**

This message will appear:

**In order to reapply this record you must also reapply the header record. Please select, and reapply the header record from the Non-Validated records table.**

Click **OK**.

The line record will remain in the non-validated table and will only be removed when the header record is reapplied or discarded.

#### **If you user choose to Discard a header record**

This message will appear:

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**Are you sure you wish to discard this record? If you choose to discard this non-validated record, this record and all its associated line items, if applicable, will be removed from Oracle Sales Offline. This record will NOT be synchronized to the online server applications, and will be removed from Oracle Sales Offline.**

Click **OK** or **CANCEL**.

If you clicked **OK**, the header record is removed from the non-validated table, no row is inserted into any summary sheet and the record is removed from Oracle Sales Offline.

If the header record contains related records, then the line records will also be removed from the non-validated table and the related data is removed.

### **If you choose to Discard a line record**

This message will appear:

**In order to discard this line level record you must first discard the header record. Please select, and discard the header record from the Non-Validated Records table. If you choose to do so, both the header record and all its associated line records is removed from Sales Offline.**

Click **OK**.

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**Note:** For quotes, users have the ability to discard a conflicted line without first having to discard the header record. For example if a quote is created with twenty line items and one of the line items fails validation, in the Non-Validated Records section, a link to the failed line item will be provided. You may choose to update the line item and re-apply or discard the line item completely.

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## 1.10 Timing Log

The timing log provides timing statistics for these events:

- Opening a file
- Synchronizing data
- Saving a file

These statistics enable administrators to analyze Oracle Sales Offline's performance and identify issues that may arise when a large volume of records are processed.

## Enabling Detailed Logging

### Steps

By default, the timing log is always enabled. You can choose to enable detailed logging.

1. Open SalesOffline.xls.
2. Select Oracle > Logging > Detailed
3. You can also choose Reset to restart the logging, so that the existing log file is deleted and a new one begun during your current session.
4. Exit the template.
5. Reopen the template.

The next time you synchronize your data, Oracle Sales Offline will write detailed logging information about events to the log file. The log file is located in the logs directory in the folder containing Oracle Sales Offline, and is called aslclient.log.

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**Note:** Each time you open the Oracle Sales Offline template, the log file is copied to a.bak file, and the .log file is cleared. To view the timing log, you must look at the log in the logs directory before you open the template.

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## Logging for a Full or Incremental Synchronization

### Steps

Unless the Upload MyChanges checkbox is selected, the first synchronization of the Oracle Sales Offline data is a full synchronization. Subsequent synchronizations are incremental.

1. Open SalesOffline.xls.
2. Perform a full synchronization by selecting the Sync button and providing login information.
3. Exit the template.
4. View the resulting log file in the logs directory in your Oracle Sales Offline folder.

## 1.11 Version Identification in Oracle Sales Offline

You can provide support personnel with a unique version number that identifies the implemented client version of Oracle Sales Offline by navigating to Oracle > About Sales Offline. This enables you to identify the version of the client in use when you report an Oracle Sales Offline problem.

## 1.12 Status Bar Messages

Status bar messages for phases that relate to the processes of file open, file close, file save, and synchronization in Oracle Sales Offline are displayed in the Microsoft Excel status bar.



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## Managing Tasks

Sections in this chapter include:

- [Section 2.1, "Creating a Task"](#)
- [Section 2.2, "Updating a Task"](#)
- [Section 2.3, "Accessing the Daily Task Summary"](#)

Use the Task tab to view, create, and edit tasks. Tasks are your day-to-day activities related to customers, leads, and other sales-cycle events. Also, the Calendar button enables you to access a Daily Task summary, which lists your tasks occurring between specified start and end dates.

The Task tab displays all of your tasks, or tasks that have been assigned to you.

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**Note:** Oracle Sales Offline does not support recurring tasks.

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### 2.1 Creating a Task

To create a task:

#### Steps

1. In the Task tab, click **Create**.
2. In the Task Details tab, select a task type.
3. Enter a task name.
4. Describe the task.
5. Set the priority for the task.
6. Select a status for the task.

7. Specify if the task should be private or requires notification.
8. Select a category for the task.
9. Select start and end dates and times for the task, and specify if it is planned, scheduled, or actual.
10. Select the customer type, if needed, and search for the customer's name.

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**Note:** The task number is generated after synchronization.

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11. Click the References tab to add optional reference information to the task.

You can remove any reference rows by selecting the associated remove checkbox and clicking **Save** or **Apply**.

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**Note:** The References tab in Oracle Sales Offline will not automatically populate reference rows. On synchronization, the newly created task and the reference rows will automatically be created in the online sales application, and the appropriate reference rows are synchronized to the Oracle Sales Offline task. You may add additional rows in Oracle Sales Offline if you choose to do so.

For example, if you select a contact, Brenda Johnson@ Business World, the references for the contact Brenda Johnson and organization Business World are automatically generated by the online applications after you synchronize.

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12. Click the Assignments tab to add optional assignees to a task.

You can add additional persons to assign the task. In the Assignments tab of the Task detail user from, click the Add an Assignment field and select the person to assign the task from the menu. Click **Add**.

You may also remove an assignment rows (except the owner row) by selecting the associated remove checkbox and clicking **Save** or **Apply**.

---

**Note:** The Assignments tab in Oracle Sales Offline will not automatically populate any assignment rows. With the next synchronization, the assignment's owner row for the new task is automatically created in the online sales application, and the owner row is synchronized to the Oracle Sales Offline task record. The owner of the task is the Oracle Sales Offline user who created the task. You may add additional assignee rows in Oracle Sales Offline.

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13. Click the Contacts tab to add optional contacts to a task. In the Contacts tab of the Create Task user window, place in the contacts name you wish to add, click **Go**, and select the contact from the list of values. In order to select the primary contact for a Task, select the Primary radio button next to a contact.

You may remove any contact rows by selecting the associated remove checkbox and clicking **Save** or **Apply**.

14. Click the Notes tab to create a note for the task.
15. Click **Create** to create the task.

## 2.2 Updating a Task

To update a task:

### Steps

1. In the Task tab, click the task name.
2. Complete any updates.
3. Click **Apply** to apply changes as you continue to make changes, or click **Save** when you have completed your changes.

## 2.3 Accessing the Daily Task Summary

Click **Calendar** to access a Daily Task Summary. This summary displays all of the tasks that have a start date of a specified day, or within a date range.



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## Managing Leads

Sections in this chapter include:

- [Section 3.1, "Creating a Lead"](#)
- [Section 3.2, "Updating a Lead"](#)
- [Section 3.3, "Lead to Opportunity Business Flow"](#)

Use the Lead tab to view and manage leads. Leads capture the initial contact with potential customers, gathering information to indicate to a sales organization whether or not there is customer interest. When a lead is entered, it can be ranked and assigned to the appropriate sales resource.

Once enough information has been gathered, a lead can be qualified by a sales representative.

Leads can be generated through various sources:

- Marketing campaigns and trade shows can generate leads that can be imported into the system through the Lead Import process.
- TeleSales agents record lead information from phone calls.
- Field sales representatives record lead information from the field into a sales application.

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**Note:** There is Flexfield support for Header and Purchase Item level flexfields for leads. If Flexfield functionality has been implemented for a lead, the Flexfield name, field, and Flexfield button are displayed.

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## 3.1 Creating a Lead

To create a lead:

### Steps

1. In the Lead tab, click **Create**.

Some fields will automatically populate based on data and profile preferences established in your Online Sales applications.

2. Select the Organization or Person radio button to list the organization name or the person's name and address in the search results.

Enter a customer name or search for a customer. Enter the customer name in the customer field, or enter part of a customer name and click **Go**. The list of customers will display. You can select a customer from this list, or search for another customer.

Click **Create Customer** to create a customer.

Select an address by clicking **Add or Change** next to the address field. A list of customer addresses displays in the Select an Address window. Click the radio button next to the address and click **Select**.

3. Enter a lead name.
4. Select a primary contact for the lead, or create a new contact by clicking **New**.
5. Select the contact role.
6. Specify whether the lead is qualified or urgent.
7. Add the project name associated with this lead.
8. Select the status of the lead.
9. Select the lead rank.
10. Select a channel for the lead.
11. Select a response channel.
12. Select the time frame for the lead.
13. Select a budget status.
14. Enter the budget amount.
15. Select currency type.
16. Enter the source name for the lead, or search for the name by clicking **Go**.

17. Enter the offer name, or search for the name by clicking Go.
18. Enter any flexfield information, if applicable.
19. Click the Purchase Items tab to enter purchase item information.
20. Click the Notes tab to enter notes.
21. Click **Save** to save the lead.

## 3.2 Updating a Lead

To update a lead:

### Steps

1. In the Lead tab, click the name of the lead.
2. Complete any updates.
3. Click the Opportunities tab to view any opportunities generated by the lead.
4. Click **Save** when you have completed your changes.

## 3.3 Lead to Opportunity Business Flow

To create a opportunity from an lead:

In the Lead Details window, click **Lead to Opportunity**.

This information will flow from the lead to the new opportunity into a new Opportunity Detail window:

- Lead Name (Opportunity name)
- Customer Name
- Primary Contact
- Project
- Budget
- Currency
- Source (header level)
- Offer (header level)
- Address

- Lead Purchase Items (including quantity, amount, source, and offer)
- Sales Team
- Contacts

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# Managing Opportunities

Sections in this chapter include:

- [Section 4.1, "Creating an Opportunity"](#)
- [Section 4.2, "Updating an Opportunity"](#)
- [Section 4.3, "Opportunity to Quote Business Flow"](#)

An opportunity is a potential sale. This process begins with the initial customer contact and ends when the sales representative makes or loses the sale.

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 representative who created the opportunity has full access to the opportunity. Full access to the opportunity means that the sales representative who created the opportunity can add other sales team members, assign sales credits, and rate the likelihood that the opportunity will succeed.

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**Note:** There is Flexfield support for Header and Purchase Item levels for opportunities. If Flexfield functionality has been implemented for an opportunity, the Flexfield name, field, and Flexfield button display.

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---

## 4.1 Creating an Opportunity

To create an opportunity:

### Steps

1. In the Opportunity tab, click **Create**.

2. Select the Organization or Person radio button to list the organization name or the person's name and address in the search results.

Enter a customer name or search for a customer. Enter the customer name in the Select a Customer field, or enter part of a customer name and click **Go**. The list of customers will display. You can select a customer from this list, or search for another customer.

Click **Create Customer** to create a customer.

Select an address by clicking Add or Change next to the address field. A list of customer addresses displays in the Select an Address window. Click the radio button next to the address and click **Select**.

3. Enter an opportunity name.
4. Select a primary contact for the opportunity, or create a new contact by clicking New.
5. Select the contact role.
6. Enter the project name.
7. Select the status of the opportunity.
8. Select the sales channel.
9. Select the methodology associated with the opportunity.
10. Select the sales stage for the opportunity.
11. Select the win probability.
12. Enter the budget amount.
13. Enter the close date for the opportunity.
14. Specify the currency type.
15. Enter the source name for the opportunity, or search for the name by clicking Go.
16. Enter the offer name, or search for the name by clicking Go.
17. Click the Purchase Items tab to enter purchase item information.
18. Click the Notes tab to enter notes.
19. Click **Apply** to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values.
20. Click **Save** to save the opportunity.

## 4.2 Updating an Opportunity

To update an opportunity:

### Steps

1. In the Opportunity tab, click the name of the opportunity.
2. Complete any updates.
3. Click **Apply** to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.
4. Click **Save** when you have completed your changes.

## 4.3 Opportunity to Quote Business Flow

To create a quote from an opportunity:

1. In the Opportunity Details window, click **Create Quote** to flow the opportunity information into a new quote. A new quote can be created based on information that flows from an existing opportunity. Only purchase item rows with a specified inventory item numbers (along with it's associated quantity) are carried over to the new quote.

This information will flow from the opportunity to the new quote into a new Create Quote window:

- Opportunity Name (flows to the Quote Name field)
  - Customer Name
  - Contact Name
  - Sales Channel
  - Opportunity Purchase Items (if they have specific inventory items on the purchase item line)
  - Sales Team
  - Address
2. Click **Apply**.



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## Managing Quotes

Sections in this chapter include:

- [Section 5.1, "Creating a Quote"](#)
- [Section 5.2, "Updating a Quote"](#)
- [Section 5.3, "Quote Approvals"](#)
- [Section 5.4, "Place Order"](#)

A quote is the communication of pricing and discounts for a particular sale. When the customer is ready to order a particular product they are notified of this available pricing and discount information through a quote.

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**Note:** There is Flexfield support for the Quote Header and Line levels. If Flexfield functionality has been implemented for a quote, the Flexfield name, field, and Flexfield button will display.

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You must select specific items from the Profile Sync Preferences Quote tab to be used in quoting. Only those items downloaded to Oracle Sales Offline can be used to add new products to the quote.

### 5.1 Creating a Quote

To create a quote:

#### Steps

1. In the Quote tab, click **Create**.
2. Enter a quote name.

3. Select the Addresses or Contacts radio button to list the address or the contact information in the search results.

Enter a Customer name or search for a customer. Enter a keyword to search on, or the first three characters of a keyword and click **Go**. The list of customers will display. Select a customer from this list, or search for another customer.

4. Enter the contact name. Enter the contact name in the contact fields and click **Go**. The list of contacts will display. Select a contact, or search for another contact.

5. Enter the expiration date for the quote.

6. Select the primary salesperson.

7. Select the sales channel.

8. Select the order type.

9. Select the associated agreement.

10. Select the currency type.

11. Select a price list.

12. Enter any flexfield information, if applicable

13. Click **Apply** to display additional tabs.

14. Click the Lines tab to add product lines, or to add a service to a product. Click **Add New Product** to search and select products for the quote.

If you want to add a service item (for example, Warranty) to an existing product line, highlight the specific line by clicking the radio button associated with the product line, click **Add Services**, and search or select a service item to be attached to the product line. You will only be able to add service item lines for product lines are serviceable items.

15. Click the Addresses tab to add shipping and billing addresses, and manage payment terms. These addresses will default depending on the customer you entered when creating the quote. You must specify payment terms.

16. Click the Sales Team tab to add new members to the sales team.

17. Click the Sales Credits tab to give credits for the appropriate sales representative.

18. Click **Apply** to commit changes and calculate values. Modify values and then click **Apply** to recalculate values dynamically.

19. Click **Save** to save the quote.

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**Note:** If a newly created quote fails validation, or has a conflict, the quote's status will be changed to Sales Offline Error and moved to the Non-Validated record table in the Home Tab. Both Online and Offline users will not be allowed to update or process a quote (for example, submit to an order) with Sales Offline Error status. When the quote record is resolved and synced to the server, the status will return to Draft and returned to the quote tab. See [Section 1.9.1, "Non-Validated Records \(Rejected Records\)"](#) for details.

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## 5.2 Updating a Quote

To update a quote:

### Steps

1. In the Quote tab, click the name of the quote.
2. Click **Apply** to commit changes and calculate values. Modify values and then click **Apply** to recalculate values.
3. Click **Save**.

---

---

**Note:** If an updated quote fails validation, or has a conflict, the quote's status will be changed to Sales Offline Error and moved to the Conflict Resolution subtab. Both Online and Offline users will not be allowed to update or process a quote (for example, submit to an order) with the Sales Offline Error status. You can add Tasks and Notes in Oracle Field Sales, and Tasks in Oracle Sales Offline while the quote has a status of Sales Offline Error.

When the quote record is resolved in Oracle Sales Offline and synchronized to the server, the status will return to Draft and returned to the quote tab. See [Section 1.9, "Conflict Resolution"](#) for details.

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## 5.3 Quote Approvals

If you have approvals established for the Quoting application, the Initiate Approvals button will appear in the Approvals tab of the Quote Details window. If

the status transition is approved, click **Initiate Approvals** to initiate the approvals process. The Quote must be synchronized for the approvals process to begin. No approval rows are displayed in the Approvals tab of the Quote Details window.

### 5.4 Place Order

The Place Order button will highlight on the Oracle Sales Offline, Quote Details window if the Place Order status transition is established in the Quoting application. If payment terms are not specified, the Place Order button is disabled.

Oracle Field Sales users cannot transform a quote into an order when one or more lines in the quote are in a conflict state. The exception to this is the conflict status Stale Records.

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# Managing Forecasts

Sections in this chapter include:

- [Section 6.1, "Opportunity Worksheet"](#)
- [Section 6.2, "Product Category Worksheet"](#)
- [Section 6.3, "Generating Forecasts"](#)
- [Section 6.4, "Viewing and Submitting Forecasts"](#)

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

Use these worksheets to create forecasts:

- **Opportunity Worksheet:** Opportunity-level forecasting provides a tool for sales representatives to use to create their own view of, and commitment to, sales opportunities for themselves and others on the sales team. Opportunity forecasting also gives sales representatives the ability to review, modify, and commit at a more detailed product category level.
- **Product Category Worksheet:** Forecasting at the Product Category level provides sales representatives access to their pipeline aggregated into product groupings. They can then forecast their sales at the product level by rolling up opportunity lines into product groupings.

## 6.1 Opportunity Worksheet

Opportunity Level Forecasting provides a tool for sales team members to view their forecasted opportunities. Worksheets are submitted with the generated forecasts chosen for submission. To view opportunity worksheets:

### Steps

1. From the Forecast tab, click the Opportunity subtab.
2. Select the sales group.
3. Select the period name.
4. Select one of the following options:
  - **Use Previously Saved Values:** If you are forecasting for the first time, the value is based on the Oracle Field Sales profile preferences. If you have saved an opportunity worksheet, those values will default.
  - **Use Pipeline Default Values:** 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.

Edit the forecast values by highlighting the cells (Worst Case, Forecast, Best Case) and adding the value. The forecast numbers will reflect the opportunity forecast data available in Oracle Sales Offline.

5. Click **Save**.

## 6.2 Product Category Worksheet

Forecasting at Product Category level enables sales team members to view their pipeline aggregated into product groupings. Worksheets are submitted with the generated forecasts chosen for submission.

### 6.2.1 Viewing Product Level Forecasts Using Product Category Worksheets

To view product level forecasts using product category worksheets:

#### Steps

1. From the Forecast tab, click the Product Category subtab.
2. Select the sales group, for which you want to forecast.
3. Select the period name.

The forecast numbers will reflect the opportunity forecast data available in Oracle Sales Offline.

4. Edit the forecast values by selecting the Worst Case, Forecast, or Best Case cell and adding in the value.

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

5. Click **Save**.

## 6.3 Generating Forecasts

Under the Forecast tab, you will find the Generate Forecast subtab. Sales representatives can generate individual forecasts for multiple periods from this window. Forecasts are generated based on their current downloaded pipeline values. You can forecast based on the default currency. To generate forecasts:

### Steps

1. From the Forecast tab, click the Generate Forecast subtab.
2. Select a sales group from the drop down list.
3. Select the from period and to period.
4. Click **View**.
5. Select all periods for which you want to generate forecasts by selecting the check box.

The forecast is now ready to be submitted when you synchronize. Only the most recent submission is accepted. You cannot submit more than one forecast per synchronization.

6. Click **Submit**.

## 6.4 Viewing and Submitting Forecasts

To view and submit forecasts:

### Steps

1. From the Forecast tab, click the Forecast subtab.

2. Select the Sales Group.
3. Select the Period Name. The forecast numbers will reflect the opportunity forecast data available in Oracle Sales Offline. Edit the forecast values by highlighting the Best Case, Forecast, or Worst Case cell and adding in the value.
4. Click **Submit**.

The forecast will now be submitted when you synchronize. Only the most recent submission is accepted. You can submit only one forecast per synchronization.

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# Managing Customers

Sections in this chapter include:

- [Section 7.1, "Creating a Customer - Organization"](#)
- [Section 7.2, "Updating a Customer - Organization"](#)
- [Section 7.3, "Creating a Customer - Contact"](#)
- [Section 7.4, "Updating a Customer - Contact"](#)
- [Section 7.5, "Creating a Customer - Person"](#)
- [Section 7.6, "Updating a Customer - Person"](#)

The Customer tab contains three subtabs: Organization, Contact, and Persons. By default, the Customer tab opens to the Organization window. Click the Contact subtab to open the Contact window, or the Persons subtab to open the Persons window. A person may be a contact for an organization. An Organization may have one or more contacts.

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**Note:** There is Flexfield support for customers. If Flexfield functionality has been implemented for an organization or contact, the Flexfield name, field, and Flexfield button will display.

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## 7.1 Creating a Customer - Organization

To create an organization:

### Steps

1. In the Customer tab, Organization subtab, click **Create**.
2. Enter the organization name.

3. Enter the phonetic pronunciation of the organization name.
4. Enter any Alias for the organization.
5. Enter the DUNS number for the organization.
6. Enter the phone number for the organization.
7. Enter the tax ID for the organization.
8. Enter the e-mail address for the organization.
9. Select the customer category.
10. Enter the business line for the organization.
11. Enter the annual revenue number for the organization.
12. Enter the total employees in the organization.
13. Select the fiscal year end for the organization.
14. Enter the years established.
15. Enter the URL for the organization's website.
16. Enter any flexfield information, if applicable.
17. Click the Addresses tab to manage addresses for the organization.
18. Click **Create Address** to add a new address. Enter the required fields (an address type) and click **Save** to save the address information.
19. Click the Notes tab to enter notes.
20. Click **Save**.

## 7.2 Updating a Customer - Organization

To update information for an organization:

### Steps

1. In the Customer tab, Organization subtab, click the name of the organization.
2. Complete any updates.
3. Click the Addresses tab to add new addresses for the person.
4. Click the Sales Team tab to add or remove sales team members.
5. Click the Notes tab to enter notes.

6. Click the Tasks tab to review tasks.
7. Click **Save**.

## 7.3 Creating a Customer - Contact

To create a contact:

### Steps

1. In the Customer tab, Contact subtab, click **Create**.
2. Select a Contact. You can select an existing contact from the list of contact names in the Contact Name menu, or specify a new Contact name by clicking **New**.  
To create a new contact, click **New**.
3. Click **Save** to create the new contact. The newly created contact is now available for you to add to an existing organization.
4. Select Organization.  
If the organization is new, click **New** next to the organization field to create new organization.
5. Select a relationship type.
6. Enter the phone number for the contact.
7. Enter the e-mail address for the contact.
8. Enter the department of the contact and the department type.
9. Enter the job title.
10. Select the job title type for the contact.
11. Select the preferred language for the contact.
12. Specify if the contact is a decision maker or a reference.
13. Enter any flexfield information, if applicable.
14. Click **Add an Address** in the Addresses tab to add new addresses for the contact. A list of addresses associated with the organization will appear. Choose an address and click **Select**. The Add a Relationship Address window appears allowing you to add address types.
15. Click the Notes tab to enter notes.

16. Click **Save**.

## 7.4 Updating a Customer - Contact

To update information for a contact:

### Steps

1. In the Customer tab, Contact subtab, click a contact name.
2. Complete any updates.
3. Click the Addresses tab to add new addresses for the person.
4. Click the Classifications tab to select a classification category and a classification status.
5. Click the Sales Team tab to add or remove sales team members.
6. Click the Notes tab to enter notes.
7. Click the Tasks tab to review tasks.
8. Click **Save**.

## 7.5 Creating a Customer - Person

To create a person:

### Steps

1. In the Customer tab, Person subtab, click **Create**.
2. Enter the person's name. This includes last name, first name, preferred name, last and first name pronunciation, and middle name.
3. Enter any title and second title (if applicable).
4. Enter any suffix (for example, Jr.).
5. Enter date of birth for the person.
6. Select gender.
7. Select native language.
8. Enter phone number.
9. Enter e-mail address.

10. Select a status for the person.
11. Enter any flexfield information, if applicable.
12. Click **Create Address** in the Addresses tab to add new addresses for the person. A list of addresses associated with the organization will appear. Choose an address and click **Select**.
13. Click the Notes tab to enter notes.
14. Click **Save**.

## 7.6 Updating a Customer - Person

To update information for a person:

### Steps

1. In the Customer tab, Person subtab, click a person name.
2. Enter product information.
3. Click the Addresses tab to add new addresses for the person.
4. Click the Classifications tab to select a classification category and a classification status.
5. Click the Sales Team tab to add or remove sales team members.
6. Click the Notes tab to enter notes.
7. Click the Tasks tab to review tasks.
8. Click **Save**.

