Oracle® Sales

User Guide

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Contents

Send Us Your Comments vii

Preface ix

How To Use This Guide ix
Documentation Accessibility x
Other Information Sources x
Training and Support xv
Do Not Use Database Tools to Modify Oracle Applications Data xvi
About Oracle xvi

1 Introduction to Oracle Sales

1.1 Overview of Oracle Sales 1-2
1.2 Oracle Sales Key Features 1-2
1.3 Oracle Sales Interface and Navigation 1-4
1.4 Searches in Oracle Sales 1-4
1.5 Oracle Sales Dashboard 1-5
1.6 Lead Management 1-5
1.7 Opportunity Management 1-6
1.8 Customer Management 1-7
1.9 Contact Management 1-7
1.10 Calendar and Task Management 1-8
1.11 Note Management 1-8
1.12 Forecasting in Oracle Sales 1-9
1.13 Sales Campaigns in Oracle Sales 1-9

1.14 Sales Methodologies in Oracle Sales 1-9
1.15 Oracle Sales and Oracle Quoting Integration 1-10
1.16 Oracle Sales and Oracle Proposals Integration 1-10
1.17 Oracle Sales and Oracle Telesales Integration 1-10
1.18 Competitor Tracking in Oracle Sales 1-11
1.19 Daily Business Intelligence (DBI) for Sales and Sales Intelligence Reporting 1-11
1.20 Personalization in Oracle Sales 1-11
1.21 Security in Oracle Sales 1-12
1.22 Data Quality Management in Oracle Sales 1-12
1.23 Accessing Oracle Sales 1-13
1.24 Product Dependencies 1-13

2 Oracle Sales Example Task Flows

2.1 Create and Rank a Lead 2-2
2.2 Convert a Lead to an Opportunity 2-3
2.3 Update an Opportunity 2-4
2.4 Create a Quote from an Opportunity 2-5
2.5 Create a Sales Forecast 2-6
2.6 Execute a Campaign Schedule 2-7
2.7 Create a Customer - Data Quality Warning 2-8

3 Oracle Sales Quick Reference

3.1 Sales Dashboard 3-2
3.2 Leads 3-5
3.2.1 Creating and Updating a Lead 3-5
3.2.1.1 Customer Analysis Tab 3-6
3.2.1.2 Notes and Tasks Tab 3-7
3.2.1.3 Contacts Tab 3-7
3.2.1.4 Products Tab 3-7
3.2.1.5 Sales Cycle Tab 3-7
3.2.1.6 Sales Team Tab 3-8
3.2.1.7 Proposals Tab 3-8
3.2.2 Creating an Opportunity from a Lead 3-8
3.3 Sales Methodologies 3-10
3.3.1 Using a Sales Methodology 3-11

3.4 Opportunities 3-12
3.4.1 Creating and Updating an Opportunity 3-12
3.4.1.1 Customer Analysis Tab 3-14
3.4.1.2 Notes and Tasks Tab 3-14
3.4.1.3 Contacts Tab 3-15
3.4.1.4 Products Tab 3-15
3.4.1.5 Sales Cycle Tab 3-15
3.4.1.6 Sales Team Tab 3-16
3.4.1.7 Proposals and Quotes Tab 3-16
3.4.2 Creating a Quote from an Opportunity 3-17
3.4.3 Closing an Opportunity 3-17
3.5 Customers 3-18
3.5.1 Creating and Updating a Customer 3-18
3.5.1.1 Profile Tab 3-19
3.5.1.2 Notes and Tasks Tab 3-19
3.5.1.3 Contacts Tab 3-19
3.5.1.4 Address Book Tab 3-20
3.5.1.5 Business Relationships Tab 3-20
3.5.1.6 Classifications Tab 3-20
3.5.1.7 Sales Team Tab 3-20
3.6 Contacts 3-21
3.6.1 Creating and Updating a Contact 3-21
3.6.1.1 Business Activities Tab 3-22
3.6.1.2 Address Book Tab 3-22
3.6.1.3 Notes and Tasks Tab 3-22
3.7 Sales Campaigns 3-22
3.7.1 Creating a Sales Campaign Schedule 3-23
3.7.2 Viewing Sales Campaign Details 3-25
3.8 Forecasting 3-26
3.8.1 Creating and Updating a Forecast 3-27
3.8.2 Forecasting as a Sales Manager 3-28
3.9 Tasks 3-29
3.9.1 Creating and Updating Tasks 3-29
3.10 Calendar 3-30
3.10.1 Creating and Updating Appointments 3-30

3.10.1.1 People and Resources Tab 3-30
3.10.1.2 Details Tab..... 3-31
3.10.1.3 Repeating Tab 3-31
3.10.1.4 Related Information Tab 3-31
3.11 Quotes 3-31
3.11.1 Creating Quotes..... 3-32
3.12 Proposals..... 3-32
3.12.1 Creating Proposals 3-32

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Part No. B13762-01

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.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
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Preface

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

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

- The principles and customary practices of your business area.
- Oracle Applications Framework

  To learn more about the Oracle Applications Framework, see the *OA Personalization Framework and OA Extensibility Framework Guide*
- Oracle Self-Service Web Applications.

  To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

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

How To Use This Guide

The Oracle Sales User Guide contains the information you need to understand and use Oracle Sales. This guide contains three chapters:

- Chapter 1, "Introduction to Oracle Sales", provides an overview of Oracle Sales.
- Chapter 2, "Oracle Sales Example Task Flows", shows representative task flows.
- Chapter 3, "Oracle Sales Quick Reference", presents a quick reference to using the Oracle Sales interface to accomplish your sales tasks.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

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

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).

- **PDF Documentation-** See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help -** You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to

your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **11i Release Content Document -** Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.
- **About document -** Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

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

You can read the guides 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.

Guides 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). 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.

Guides Related to This Product

Oracle Marketing User Guide

This guide contains information on using Oracle Marketing. Oracle Marketing automates the entire marketing process from campaign planning, budget management, and list creation to execution and analysis.

Oracle Proposals User Guide

This guide contains information on using Oracle Proposals. Oracle Proposals allows you to generate dynamic proposals using templates. Oracle Proposals streamlines proposal creation by automating tasks. You can generate proposals from templates that package recurring proposal elements such as cover letters, executive summaries, and product descriptions.

Oracle Quoting User Guide

This guide contains information on using Oracle Quoting. Oracle Quoting enables the creation and management of customer quotes across all sales and interaction channels. Organizations can use Oracle Quoting to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle.

Oracle Territory Manager User Guide

This guide contains information on using Oracle Territory Manager. Oracle Territory Management assigns business objects (customers, opportunities, and leads, for example) to resources based on configured business rules.

Oracle TeleSales User Guide

This guide contains information on using Oracle TeleSales. Oracle Telesales is an application designed for interaction center professionals, whether they are inbound or outbound agents, providing provides tools to manage the sales cycle, from prospecting to booking orders.

Oracle E-Business Intelligence Daily Business Intelligence User Guide

This guide contains information on the various Daily Business Intelligence Reports, including Daily Business Intelligence for Sales.

Oracle Sales Intelligence User Guide

This guide describes the Sales Intelligence reports.

Oracle Inventory User Guide

This guide contains information on using Oracle Inventory. Oracle Inventory enables you to set up your company's inventory sites and business units defining organizations, locations, subinventories, locators, items and units of measure.

Oracle Common Application Components User Guide

This guide contains information on using Oracle Common Application Components, such as Notes and Tasks.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Installation and System Administration

Oracle Sales Implementation Guide

This guide provides information on implementing Oracle Sales.

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 and the Oracle 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 guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the About document for your product. About documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

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 Applications Developer’s Guide

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

Oracle Applications Framework Developer's Guide

This guide contains details for developing applications using the Oracle Applications Framework (OA Framework), which is the Oracle Applications development and deployment platform for HTML based business applications. The OA Framework is composed of a set of middle-tier runtime services as well as a design-time extension to Oracle9i Developer called the Oracle Applications Extension (OA Extension).

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Sales and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 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 Oracle server, and your hardware and software environment.

Oracle*MetaLink*

Oracl*eMetaLink* 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 Oracl*eMetaLin*k, 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 Oracl*eMetaLink* 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.

1

Introduction to Oracle Sales

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

- Section 1.1, "Overview of Oracle Sales"
- Section 1.2, "Oracle Sales Key Features"
- Section 1.3, "Oracle Sales Interface and Navigation"
- Section 1.4, "Searches in Oracle Sales"
- Section 1.5, "Oracle Sales Dashboard"
- Section 1.6, "Lead Management"
- Section 1.7, "Opportunity Management"
- Section 1.8, "Customer Management"
- Section 1.9, "Contact Management"
- Section 1.10, "Calendar and Task Management"
- Section 1.11, "Note Management"
- Section 1.12, "Forecasting in Oracle Sales"
- Section 1.13, "Sales Campaigns in Oracle Sales"
- Section 1.14, "Sales Methodologies in Oracle Sales"
- Section 1.15, "Oracle Sales and Oracle Quoting Integration"
- Section 1.16, "Oracle Sales and Oracle Proposals Integration"
- Section 1.17, "Oracle Sales and Oracle Telesales Integration"
- Section 1.18, "Competitor Tracking in Oracle Sales"

- Section 1.19, "Daily Business Intelligence (DBI) for Sales and Sales Intelligence Reporting"
- Section 1.20, "Personalization in Oracle Sales"
- Section 1.21, "Security in Oracle Sales"
- Section 1.22, "Data Quality Management in Oracle Sales"
- Section 1.23, "Accessing Oracle Sales"
- Section 1.24, "Product Dependencies"

1.1 Overview of Oracle Sales

Oracle Sales is an enterprise application for sales professionals that simplifies and optimizes the task of planning and managing the sales process. Oracle Sales simplifies the sales process by providing complete visibility into the sales cycle, helping companies to plan and manage effective selling activities. It is fully integrated in the E-Business Suite and covers key field sales flows from leads to opportunities to quotes. Oracle Sales is integrated with Territory Management, Quoting, Inventory, Service Contract, Order Management, Proposals, and Marketing. Oracle Sales has been developed using the standard Oracle Self Service Framework. It is optimized for use via wireless.

1.2 Oracle Sales Key Features

Oracle Sales includes the following features:

- **Streamlined creation and management of leads and opportunities:** You can create new leads manually, import leads from Oracle Marketing using the sales campaign tool, or use leads entered by TeleSales agents. Oracle Sales assists in tracking these leads and routing them to the appropriate sales representative, enabling the conversion of leads to opportunities. After conversion, you can update opportunity details and track opportunity progress.
- **Access to integrated account history, as well as a full contact repository**: Oracle Sales provides you with a complete view of the customer by integrating information from other E-Business Suite applications.
- **Ability to track interactions with customers from the initial marketing campaign to creation of leads, and on to the completion of sales opportunities:** Oracle Sales employs notes functionality to track customer interactions. You can enter notes for leads, opportunities, customers, contacts, and forecasts.

- **Competitor tracking:** Within each opportunity in Oracle Sales, you can include competitor information such as name, product, and win/loss status. Additionally, Oracle Sales has defaulting capabilities that match products in the opportunity to potential competitor products.
- **Convenient customer analysis:** Important customer information is integrated into the leads and opportunities pages in Oracle Sales. While working on leads or opportunities, you can view information such as a list of all products that a customer has currently purchased that have service contracts, a list of current and past opportunities, a 12-month service summary, and a list of existing service requests. This provides you with background information on the account as you develop leads and opportunities.
- **360 Degree View in Oracle Sales:** The application offers you a view of:
  - Orders
  - Customers
  - Leads
  - Proposals
  - Quotes
  - Service Requests
  - Products
  - Returns
  - Campaigns
- **Integrated product information:** Oracle Sales enables you to add product information to leads and opportunities to track which goods or services customers may want to purchase. The products that you can add are defined and categorized in Oracle Inventory.
- **Sales team management:** Sales team data is integrated into the leads, opportunities, and customer pages in Oracle Sales. Information on each sales team member is displayed, including name, job title, sales group affiliation, and contact data. Sales team members can be added to a lead, opportunity, or customer manually, or by using Territory Manager to build the sales team according to pre-defined business rules.
- **Customized flexfields:** Salespeople can use global and context-sensitive descriptive flexfields to enter additional information for leads, opportunities, customers, and contacts. Flexfields are defined by your organization, and allow

unique information to be entered, stored, and managed using the Oracle Sales application.

- **Forecasting:** Oracle Sales provides sales organizations with flexibility in managing their forecasts. Sales organizations can analyze their forecast data at geographic, opportunity, and product levels, thereby enabling management teams to judge the overall health of their organization.

1.3 Oracle Sales Interface and Navigation

The Oracle Sales interface includes these features:

- **Shortcuts on the Sales Dashboard:** Displays links to sales tools, as well as customer, lead, and opportunity pages.
- **Link trail:** As you navigate through Oracle Sales, the links to the pages you have visited are shown at the top of your current page. For example:

  Sales Dashboard > Customers > Customer: BrandNew Industries > Contact: Leslie Moore (BrandNew Industries)

  Use these links to navigate back through the product.
- **Partial page refresh:** This feature enables you to see the changed portion of a page without waiting for the entire page to refresh. For example, if you are viewing a table of leads, you can select a radio button next to a lead and details about that lead will be displayed below the table. When you select a different lead, the information shown below the table is refreshed with details on the newly selected item.
- **Sortable table columns:** Many table columns are sortable in Oracle Sales. Clicking the column heading will sort the data in ascending or descending order.
- **Required fields:** Fields with asterisks denote required information.

1.4 Searches in Oracle Sales

You can search for customers, contacts, opportunities, leads, and tasks in Oracle Sales. For simple searches, enter your search criteria and click **Go**.

You can use the wildcard character percent sign (%) to replace one or more characters in the search string. However, the percent sign cannot be the first character in the search string.

Searches for customers can be simple or advanced. Advanced searches enable you to specify whether all of some of your search conditions must be met, and to add search criteria. Click **Go** to conduct the search.

1.5 Oracle Sales Dashboard

The Sales Dashboard provides you with a summary display of your on-going leads, opportunities, and customer interactions. The Sales Dashboard can contain the following areas. Your implementation might be personalized to contain fewer areas.

- Sales Funnel
- Shortcuts
- Latest Submitted Forecast
- Calendar & Tasks
- Top Opportunities
- Leads
- Cross-Sell/Up-Sell Sales Campaigns
- Top Customers

See Section 3.1, "Sales Dashboard" for details.

1.6 Lead Management

Oracle Sales assists in tracking leads, routing them to the appropriate sales representatives, and converting the leads to opportunities. Lead management features include the ability to:

- Create leads in Oracle Sales, or work with leads from Marketing sales campaigns tools, or from TeleSales agents.
- Assign leads to sales representatives manually, or assign automatically using the Territory Assignment Program (TAP).
- Rank leads using business-specific logic appropriate to different campaign strategies, regions, or products.
- View comprehensive lead details that can be updated as needed. Leads can be assigned to a sales channel, and as work progresses on the lead you can use a sales methodology to assist you in lead qualification. You can manage the progress of the lead by updating the lead's status. When leads are canceled or

closed, information about the closure is captured in order to assist win/loss analysis.

- Send sales collateral
- View customer information
- Track contacts related to the lead
- Search on key lead criteria in order to find the right lead
- Convert qualified leads to opportunities
- Create proposals
- Enter notes for a lead and share them with sales team members
- Track tasks for the lead

See Section 3.2, "Leads" for details.

1.7 Opportunity Management

Sales teams can use Oracle Sales as a central location to update opportunity details, track progress towards completing sales efforts, and manage ongoing interactions with the customer. Opportunity management features include the ability to:

- Convert opportunities from a lead or manually create them in Oracle Sales.
- Assign opportunities to a single sales representative or a sales team dedicated to the opportunity. Assignment can be done manually or automatically using Territory Manager rules.
- View and update comprehensive opportunity details. Opportunities can be assigned a sales channel, and as work progresses, you can use sales methodologies to assist in winning the opportunity. You can manage the progress of the opportunity by updating the opportunity's win probability as well as its status, and when an opportunity is canceled or closed, information about the closure is captured in order to assist win/loss analysis.
- Track contacts
- Enter forecast information
- View customer data
- Create proposals or quotes
- Search on key opportunity criteria in order to find the right opportunity

- Enter notes for an opportunity and share them with sales team members
- Track tasks for the opportunity

See Section 3.4, "Opportunities" for details.

1.8 Customer Management

Oracle Sales provides you with a detailed view of customer data by integrating information from other E-Business Suite modules such as marketing, service contracts, sales, and order management. Customer information that is displayed includes:

- Integrated view of customer information, including marketing campaigns, open leads or opportunities, products under service contract, proposals and quotes received, and recent orders.
- Company data such as addresses, company facts, and revenue information
- Notes from the sales representatives working on a customer account
- Tasks that need to be completed for the customer
- Contact repository containing a full list of contacts and addresses for each customer.
- Business relationships with other organizations such as channel partners or subsidiaries
- Sales team members associated with each customer

See Section 3.5, "Customers" for details.

The customer management functionality of Oracle Sales also has a built-in Data Quality Management (DQM) feature that helps you avoid the creation of duplicate customers. See Section 1.22, "Data Quality Management in Oracle Sales"for details.

1.9 Contact Management

Oracle Sales provides a contact management system that enables you to enter and track a wide range of data regarding contacts, including:

- Contact information such as primary e-mail, telephone number, address, job title, and department, as well as secondary addresses and phone numbers.

- Business activities that are associated with a particular contact. These activities include open leads and opportunities, proposals and quotes received by the contact, and recent orders.
- Suggested contacts for a lead or opportunity based upon product interest. For example, you may create a new lead for a customer who is interested in a particular product. Oracle Sales will then search the customer's opportunites for contacts related to that product and will display these relevant contacts as suggested contacts. You then have the option of choosing one or more of the suggested contacts to make them a "selected" contact for the lead. Selected contacts are then used as the official contacts to pursue when qualifying the lead. If you elect not to use the selected contacts, you can search for a contact to add, or create a new contact
- Notes for the contact in order to track interactions and monitor progress towards goals
- Tasks can be created for a contact and monitored for completion

See Section 3.6, "Contacts" for details.

Contacts uses the same Data Quality Management (DQM) feature that is used in the Customer management module. See Section 1.22, "Data Quality Management in Oracle Sales"for details.

1.10 Calendar and Task Management

Oracle Sales enables you to see scheduled appointments in your work day, and to view other dates to see scheduled meetings. You can access your appointments by using an integrated calendar tool provided by Oracle. This tool enables you to create new appointments, invite other attendees, and synchronize with external calendar applications.

Task management is a feature of the leads, opportunities, contacts, and customers modules. While accessing one of these modules, you can create a task, and can add subject, due date, and status information. See the *Oracle Common Application Components User's Guide* for details on calendar and task functionality.

See Section 3.9, "Tasks" and Section 3.10, "Calendar" for details.

1.11 Note Management

You can add notes for leads, opportunities, customers, contacts, and forecasts. The name of the note's author and the date that the note was created are also displayed.

This note history provides the sales team with a source of information on the progress made on a particular item. See the *Oracle Common Application Components User's Guide* for details on note functionality.

1.12 Forecasting in Oracle Sales

Oracle Sales provides sales organizations with flexibility in managing their forecast. Sales organizations can analyze their forecast data at geographic, opportunity, and product levels, thereby enabling management teams to judge the overall health of their organization. Via integration with Opportunity Management, opportunity forecasts can be maintained within the opportunity itself. This provides instant visibility to management without the need for users to separately submit forecasts, thereby reducing the time spent by users preparing their forecast. Product family forecasts may be provided to management dependent on, or independent of, the opportunity pipeline.

See Section 3.8, "Forecasting" for details.

1.13 Sales Campaigns in Oracle Sales

Oracle Sales integrates with Oracle Marketing to provide the Sales Campaign functionality to sales managers. This functionality enables sales managers to explore their installed base and historical customer data, and mine the data for cross-sell and up-sell opportunities.

The Oracle Marketing application enables sales as well as marketing users to create activities that cross-sell and up-sell products to customers in particular sales territories. When a sales campaign is launched, leads are generated for sales follow-up. Territory Management assigns the appropriate sales representatives to the leads based upon predefined rules. If these leads are converted to opportunities, the same sales representatives will be carried over to the new opportunities. Each new opportunity will also be linked to the original sales campaign. This allows the marketing and sales organizations to track the progress and success of sales campaign initiatives.

See Section 3.7, "Sales Campaigns" for details.

1.14 Sales Methodologies in Oracle Sales

Oracle Sales supports custom sales methodologies. Organizations can create sales methodologies that match their requirements for different product lines, sales channels, organization units, or marketing campaigns. Each sales methodology can be defined with multiple stages, and each stage can have multiple steps.

You can access these sales methodologies when you create and manage leads and opportunities. Each stage of the methodology has a sales coach that can consist of a series of questions regarding that sales stage, or provide you with sales stage information. The sales coach assists you by reminding you of points to consider and procedures to follow during the sales effort. Additionally, you can export summaries of the sales coach data into printable worksheets that can be used during review meetings and training sessions.

See Section 3.3, "Sales Methodologies" for details.

1.15 Oracle Sales and Oracle Quoting Integration

Quoting is integrated into the opportunity management functionality in Oracle Sales. The opportunity and customer detail pages display quote information including quote name, number, owner, status, creation and expiration dates, and amount. If a quote is created from an opportunity, key information concerning the customer, sales team, and products will be integrated into the new quote.

See Section 3.11, "Quotes" for details.

1.16 Oracle Sales and Oracle Proposals Integration

Oracle Sales integrates proposals into the lead and opportunity areas in order to enable you to create proposals and send collateral throughout the sales cycle. Information about proposals that is displayed within the lead and opportunity pages includes proposal name, description, owner, due date and status. Additionally, if a proposal is created for leads or opportunities that are linked to a sales campaign, the proposal will incorporate content and formatting developed specifically for that campaign.

See Section 3.12, "Proposals" for details.

1.17 Oracle Sales and Oracle Telesales Integration

Oracle TeleSales is designed for inbound telesales agents or outbound telemarketing agents. A sales opportunity can begin in TeleSales and then transfer to Oracle Sales. TeleSales agents record lead information from phone calls into the enterprise database, and these are accessible in Oracle Sales for further processing by field sales representatives.

1.18 Competitor Tracking in Oracle Sales

Oracle Sales enables you to track competitor efforts within opportunities. Oracle Sales also provides defaulting capabilities that match products in the opportunity with potential competitors. For example, if an opportunity has two products and you link one product to a particular competitor, Oracle Sales checks to see if the second product is also associated with the same competitor. If true, the second product is linked to the competitor. If required, you can manually overwrite the link. This functionality provides a convenient method for tracking how sales efforts compare to an organization's competitors, and assists in understanding win/loss trends and uncovering emerging competitive threats.

1.19 Daily Business Intelligence (DBI) for Sales and Sales Intelligence Reporting

Oracle Daily Business Intelligence (DBI) for Sales is a management reporting tool for sales executives and managers to gain the most comprehensive forecast analysis, revenue backlog summary, opportunity activity review, and sales force comparisons for their organizations. Oracle Sales uses DBI information to display top opportunities, top customers, products under contract, and service summary information.

Oracle Sales Intelligence provides senior executives as well as sales and marketing managers with comprehensive, real-time views of the sales cycle, that help them assess sales performance. Sales Intelligence enables you to navigate to directly into Oracle Sales.

1.20 Personalization in Oracle Sales

Your organization will want to perform some business analysis before implementing Oracle Sales in order to personalize the interface for your optimum use. Your system administrator can customize the Oracle Sales user interface in many areas. For example, personalization can determine the number of rows displayed in a table (for example, 10 rows or 20 rows), specify product branding (logo or other branding), or hide or show parts of the Sales Dashboard and other pages.

1.21 Security in Oracle Sales

Oracle Sales security has three components for sales representatives:

- Customer access security
- Lead access security
- Opportunity access security

Additionally, security differs based on whether the user is a sales representative or a sales manager.

Sales Representative Access

There are two levels of access to customers, leads, and opportunities:

- **Full:** Update access for all customers, leads, and opportunities
- **Sales Team:** Update access to all customers for which you are on the Customer, Lead, or Opportunity sales team and where you have full access. Read-only access to all customers, leads, and opportunities where you are on the Customer, Lead, or Opportunity sales team and full access is not granted.

Manager Access

If you are a sales manager, there are three additional levels of access for customers, leads, opportunities, and forecasts:

- **Update data:** Update access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s).
- **Inherit data:** Update access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s) with full access granted and read-only access to all customers, leads, or opportunities where your subordinates are on the respective sales team(s) with full access not granted.
- **View data:** Read-only access to all customers, leads, and opportunities where the user's subordinates are on the Customer, Lead, or Opportunity sales team(s).

1.22 Data Quality Management in Oracle Sales

When a you create a new customer or contact, Oracle Sales checks to see if there is an existing customer or contact that has similar characteristics (such as name, city, state, country) to the new customer or contact. If the validation indicates that the new item might be a duplicate, the DQM feature displays a warning that lists the existing customers or contacts that closely match the new item. You can elect to use one of the items in the list, or continue with the creation of a new customer or contact.

1.23 Accessing Oracle Sales

Log into Oracle HTML Applications, using the Sales User responsibility. Navigate to Sales User > Sales Dashboard.

1.24 Product Dependencies

Oracle Sales is dependent on these applications:

- **Daily Business Intelligence (DBI):** Top opportunities, top customers, products under contract, and service summary information
- **Calendars and Tasks:** Calendar and task sections of the Sales Dashboard and imbedded task functionality across the sales application suite
- **Oracle Marketing:** Marketing campaign data that may be the source of leads and opportunities, sales campaign data, and competitor information
- **Oracle Service Contracts:** Contract details for service items from Oracle Service Contracts
- **Inventory:** Product information selected on leads and opportunities
- **Quoting:** Data on quotes, and also the sales supplements for sales coaches
- **Proposals:** Data on proposals
- **Oracle Applications Framework:** Provides the framework and user interface for Oracle Sales. Allows for personalization of the Oracle Sales user interface
- **Territory Manager:** Sales representative assignment rules
- **Trading Community Architecture (TCA):** Customer and contact information
- **Notes:** Notes functionality throughout Oracle Sales
- **Intellisync by PumaTech:** Desktop tool that synchronizes the Oracle Sales calendar with external calendar applications, such as Outlook

2

Oracle Sales Example Task Flows

These flows depict examples of tasks you can perform in Oracle Sales. The flows are not meant to show each task you can perform in the application, but to give you an idea of how to optimize the functionality in Oracle Sales. The flows shown include:

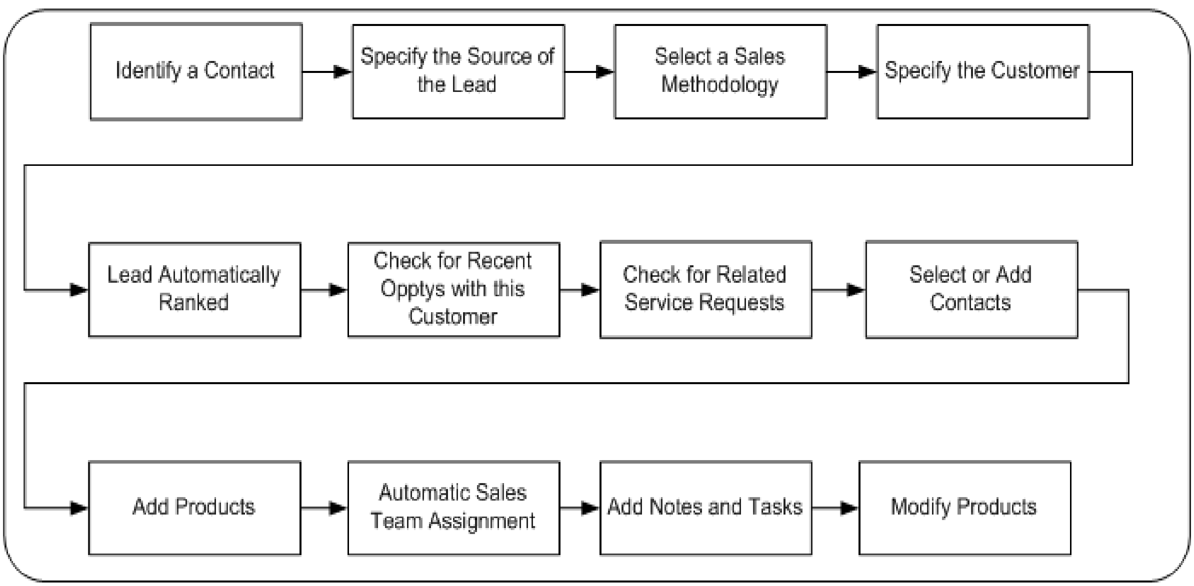
- Section 2.1, "Create and Rank a Lead"
- Section 2.2, "Convert a Lead to an Opportunity"
- Section 2.3, "Update an Opportunity"
- Section 2.4, "Create a Quote from an Opportunity"
- Section 2.5, "Create a Sales Forecast"
- Section 2.6, "Execute a Campaign Schedule"
- Section 2.7, "Create a Customer - Data Quality Warning"

2.1 Create and Rank a Lead

Leads enable you to capture your contact with a potential customer and gather information to determine the interest level of that customer. When there appears to be sufficient customer interest, the lead can be converted to an opportunity. Leads can come from Marketing, Telesales, or be entered directly into Oracle Sales.

The flow diagram shown in Figure 2–1, "Create and Rank a Lead", outlines the steps for the creation of a lead. The steps you follow might vary from this flow. See Section 3.2, "Leads" for details.

Figure 2–1 Create and Rank a Lead

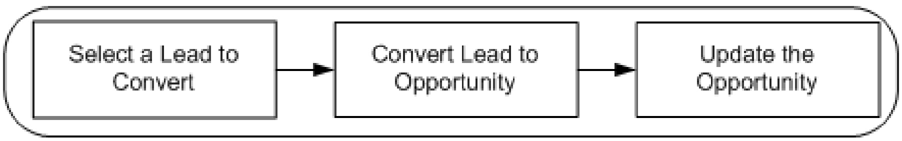


2.2 Convert a Lead to an Opportunity

You can convert qualified leads to opportunities.

The flow diagram shown in Figure 2–2, "Convert a Lead to an Opportunity", outlines the steps to convert a lead to an opportunity. See Section 3.4, "Opportunities" for details.

Figure 2–2 Convert a Lead to an Opportunity

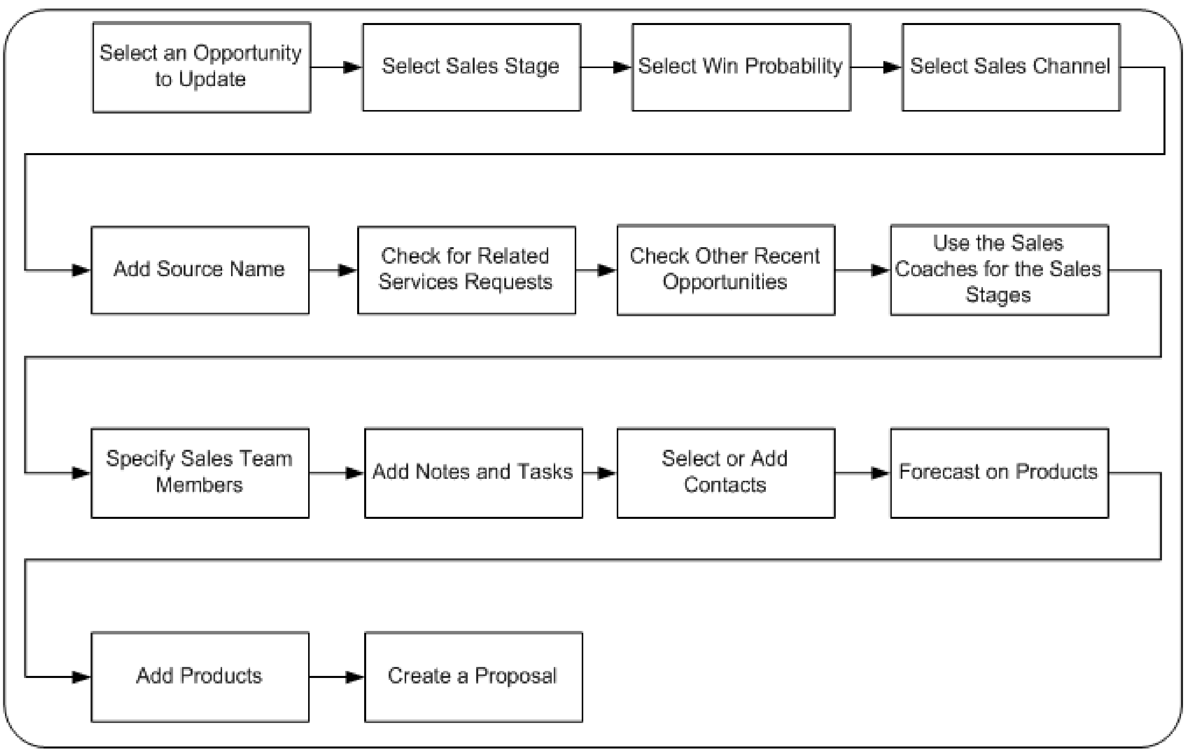


2.3 Update an Opportunity

You can update existing opportunities that you own (or to which you have update access), adding notes, tasks, contacts, forecasting, or additional products. Once you update an opportunity, you can create a proposal based on the opportunity to send to the customer.

The flow diagram shown in Figure 2–3, "Update an Opportunity", outlines the steps for updating an opportunity. The steps you follow might vary from this flow. See Section 3.4, "Opportunities" for details.

Figure 2–3 Update an Opportunity

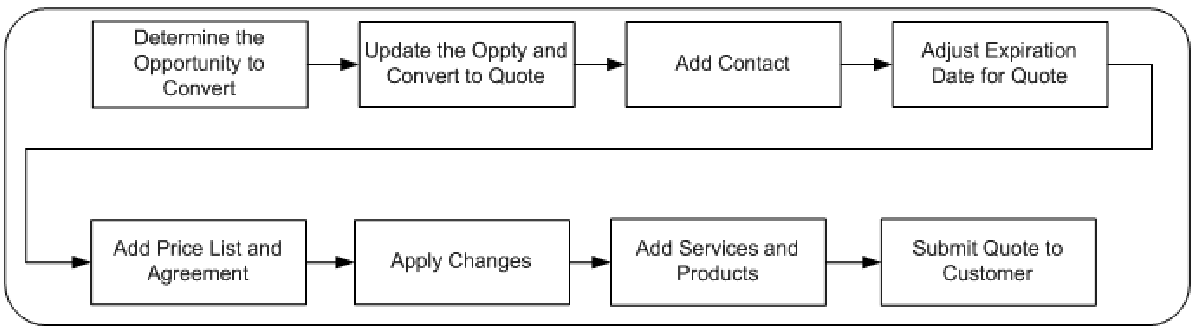


2.4 Create a Quote from an Opportunity

You can create quotes from opportunities in Oracle Sales. Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* guide for details.

The flow diagram shown in Figure 2–4, "Create a Quote from an Opportunity" outlines the steps to create a quote from an opportunity. The steps you follow might vary from this flow. See Section 3.11, "Quotes" for details.

Figure 2–4 Create a Quote from an Opportunity

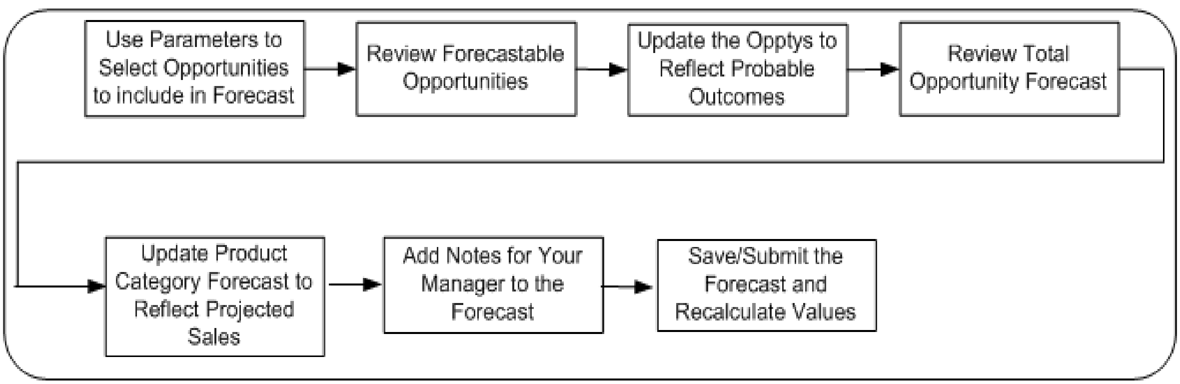


2.5 Create a Sales Forecast

Sales forecasting enables the reporting of projected sales up the management hierarchy, for sales representatives and sales managers. The goal of forecasting is to determine projected sales, the potential value of those sales, and finally potential sales revenue.

The flow diagram shown in Figure 2–5, "Create a Sales Forecast" outlines the steps for the creation of a sales forecast. The steps you follow might vary from this flow. See Section 3.8, "Forecasting" for details.

Figure 2–5 Create a Sales Forecast

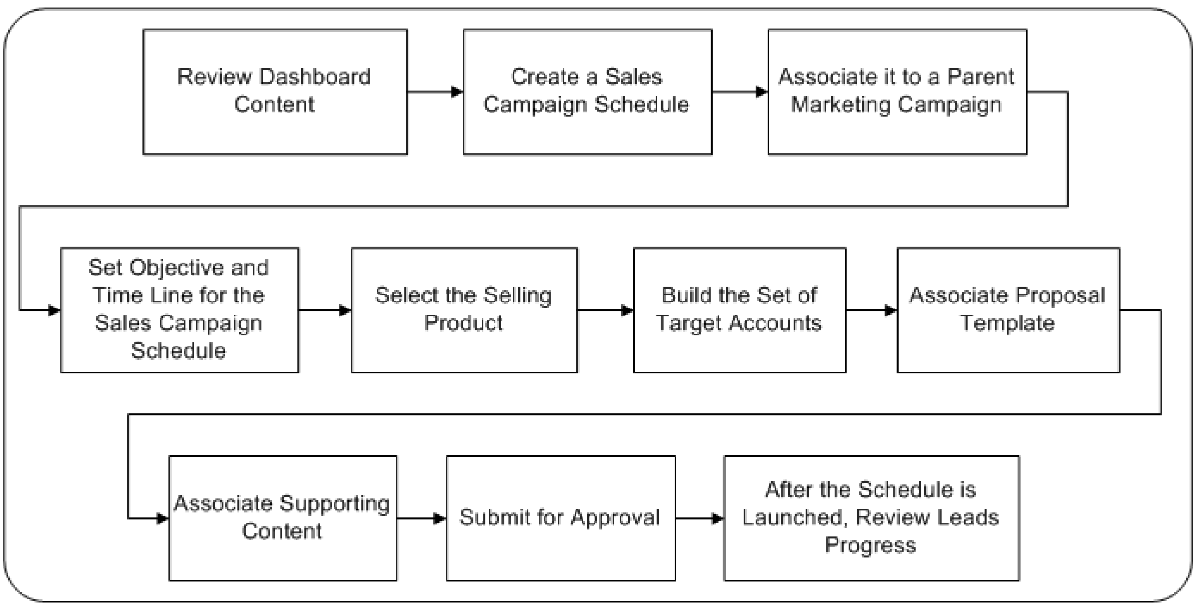


2.6 Execute a Campaign Schedule

Oracle Sales enables you to execute existing campaigns that have been previously created in Oracle Marketing by creating a campaign schedule, setting a launch date, and then actually implementing the campaign.

The flow diagram shown in Figure 2–6, "Execute a Campaign Schedule" outlines the steps for the execution of a typical campaign. The steps you follow might vary from this flow. See Section 3.7, "Sales Campaigns" for details.

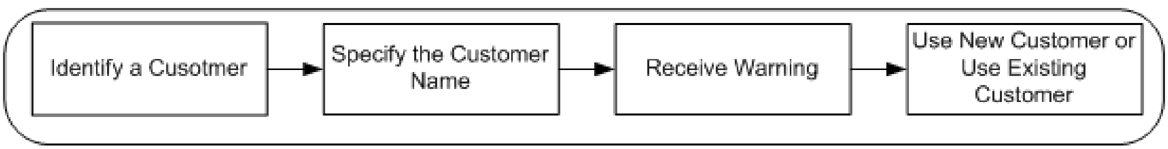
Figure 2–6 Execute a Campaign Schedule



2.7 Create a Customer - Data Quality Warning

When a you create a customer, Oracle Sales checks to see if there is an existing customer that has similar characteristics (such as name, city, state, country) to the new customer. If the validation indicates that the new item might be a duplicate, the data quality management feature displays a warning that lists the existing customers that closely match. You can elect to use one of the customer in the list, or continue with the creation of a new customer. The flow diagram shown in Figure 2–7, "Create a Customer - Data Quality Warning" shows the flow of customer creation with this warning.

Figure 2–7 Create a Customer - Data Quality Warning



This data quality warning also occurs if you attempt to create a contact that shares characteristics with an existing contact.

3

Oracle Sales Quick Reference

This chapter assists you in using Oracle Sales. It does not describe every field and value, assuming that many things are obvious to you as a sales professional. Rather, it seeks to define certain terms, give context for events, and help you locate the Oracle Sales functionality you need to get your job done.

Oracle Sales can be personalized by your administrator, so the functionality and navigation available to you in Oracle Sales might differ from what is described in this chapter. Sections in this chapter include:

- Section 3.1, "Sales Dashboard"
- Section 3.2, "Leads"
- Section 3.3, "Sales Methodologies"
- Section 3.4, "Opportunities"
- Section 3.5, "Customers"
- Section 3.6, "Contacts"
- Section 3.7, "Sales Campaigns"
- Section 3.8, "Forecasting"
- Section 3.9, "Tasks"
- Section 3.10, "Calendar"
- Section 3.11, "Quotes"
- Section 3.12, "Proposals"

3.1 Sales Dashboard

The Sales Dashboard provides you with convenient access to varied sales data from a single location. Rather than having to access the various areas of Oracle Sales individually, you can view summarized data on one page. This summarized view enables you to look for issues in your business information and to use links to access detailed information in order to resolve the issues.

By default, the Sales Dashboard displays these information areas:

- Sales Funnel
- Shortcuts
- Latest Submitted Forecast
- Calendar & Tasks
- Top Opportunities
- Leads
- Cross-Sell/Up-Sell Sales Campaigns
- Top Customers

The user preferred currency used for currency conversions in the Sales Dashboard tables is stated at the top of the Sales Dashboard (for example, Currency = US dollar).

Sales Funnel

The Sales Funnel displays a summary of the open opportunities in the pipeline. Each section of the funnel graphic represents a separate sales opportunity stage, and you can click on a funnel section to view all current open forecastable opportunities in that stage of the sales cycle.

Move your mouse over the text for a sales stage to see the total pipeline amount for the opportunities in that stage. The amount is converted into the currency displayed on the top of the Sales Dashboard page. To see the total for all of the opportunities you have in the pipeline, move your mouse over the open end of the funnel in the graphic. These are the actual amounts (not the forecast amounts) for your opportunities.

Shortcuts

The Shortcuts are a list of links to sales tools and pages in the application.

Latest Submitted Forecast

The Latest Submitted Forecast displays a summary of your most recently submitted forecast data, based on your forecast parameter settings (sales group, period type, and category). This summary includes Best Case, Forecast amount, and Worst Case.

Calendar & Tasks

The Sales Dashboard displays your daily appointments and tasks. You can view appointments for a specific day by entering that date, or click the calendar icon to use the calendar tool to select a date. To view today's appointments, click **Today**. Create new appointments by clicking the create appointment icon in the calendar.

Your tasks are listed in a separate table. Sort the listed tasks by clicking the column headings. You can view task details by clicking the task name, or update a task by clicking the Update icon. Click **Create Task** to create a new task.

Access details on appointments and tasks selecting the appropriate link.

Top Opportunities

The Top Opportunities table lists your ten opportunities that have the highest total forecast amounts, providing a convenient view of your most promising revenue prospects. Click on the opportunity names to access an individual opportunity to view details or update the opportunity; click on the customer names to access a customer to view details or update the customer's information. Sort the listed opportunities by clicking the column headings.

Click **Full List** to display the Opportunities page, which lists all of your open opportunities for which you are on the sales team. You can also search for opportunities from this page.

Click **Create** to create new opportunities.

Leads

The Leads table lists your leads by rank and divides them into the following age groups: less than or equal to two days old, three to seven days old, eight to thirty days old, and greater than thirty one days old. The table also shows closed leads, converted leads, and the conversion percentage.

This table enables you to find the older leads that may need immediate attention. Select the lead number links to view groups of leads. For example, if there are 25 leads with the rank of Hot Lead in the Open <=2 Days column, click on the number 25 to display a list of those 25 leads with that rank and age.

Click **Full List** to display the Leads page, which lists all open leads for which you are on the sales team. You can also search for leads from this page.

Click **Create** to create new leads.

Cross-Sell/Up-Sell Sales Campaigns

This table displays a summary of your leads and opportunities generated from cross-sell/up-sell sales campaigns. Your sales campaigns from the last three months are displayed. The name of the sales campaign links to the Sales Campaign Details page. The leads generated by each campaign are broken out by status, including no action, in progress, and dead leads. The percentage of leads converted to opportunities is also displayed.

Opportunities that have been converted from the leads are also displayed in the table. The opportunities are displayed by status, including in progress, lost, and won. A won percentage number is also displayed.

Select the numeric links in the table to view groups of leads or opportunities. For example, if there are 10 leads in the In Progress column, click on the number 10 to display a list of those 10 leads with that status.

Use the Previous and Next links to display additional campaign schedules, or to return to the previously displayed group.

Top Customers

The Top Customers table lists your top ten customers based on highest total order amount. The table displays the customer name, the customer’s industry, the total amount of active service contracts, the total amount of orders (excluding service contracts), and the number of open opportunities. Use links to access detailed customer or opportunity information. Sort the listed customers by clicking the column headings.

Click **Full List** to display the Customers page, which lists all of your customers. You can search for customers from this page.

Click **Create** to create new customers.

3.2 Leads

Leads are potential sales prospects, that can eventually be converted into opportunities. Leads can be generated from several sources:

- **Marketing:** Based on marketing campaigns and trade shows, leads can be generated.
- **TeleSales:** TeleSales agents record lead information from phone calls.
- **Oracle Sales:** Sales representatives record lead information from the field directly into Oracle Sales.

After a lead is generated, it is ranked and assigned to a sales representative. After key information is gathered, a lead is qualified automatically depending on your settings.

This section contains:

- Section 3.2.1, "Creating and Updating a Lead"
- Section 3.2.2, "Creating an Opportunity from a Lead"

3.2.1 Creating and Updating a Lead

Create a Lead - Entry Points

- Sales Dashboard > Leads table > Click **Create**
- Shortcuts > Click **Leads** > Click **Create**
- Business Activities > Select Lead from the menu > Click **Go**

View Leads by Rank - Entry Points

- Sales Dashboard > Leads table > Click a rank, like Hot Lead or Cold Lead

  This navigation takes you to the View Leads page, which enables you to view a list of leads by rank, and details for the lead that you select from the list. You can also search for leads from this page.

Update a Lead - Entry Points

- Sales Dashboard > Leads table > Click **Full List** > Select a lead from the list or search for a lead to access the Update Lead page
- Sales Dashboard > Shortcuts > Click **Leads** > Select a lead from the list or search for a lead to access the Update Lead page

Enter Information on the Create Lead and Update Lead Pages

Enter the requested values. Click **Apply**. When you have finished working with the Update Lead page, click **Save**.

When creating a lead, note:

- **Methodology:** Captures your lead qualification process. These are the steps you will follow to assist you in qualifying a lead. See Section 3.3, "Sales Methodologies" for details.
- **Rank:** A subjective assessment that you make about the quality of the lead, or an automatic rank assignment.
- **Sales Channel:** The sales channel assigned to the lead. For example, Alumni Visit, Commercial, Direct, or Email.
- **Source:** Name of the marketing activity that generated the opportunity. For example, a sales campaign.

On the Lead Update page, note:

- **Address:** Primary address of the customer. After you create a lead, the address defaults to the primary address for the customer. However, you can select another address for the lead that is not the primary address.
- **Stage:** The sales stages. These stages are determined by the sales methodology selected.

3.2.1.1 Customer Analysis Tab

- **Products Under Contract:** Displays the product category for products for which your customers have service contracts. The product category name can be expanded to list the nested levels of product categories and items. The amount shown is the value of the service for products in that category that are under the service contract. The amounts roll up to the first level of the product hierarchy.
- **Recent Opportunities:** Displays the previous opportunities for the customer, showing the name of the opportunity, the close date, the current status, the owner, and the owner’s telephone number. You can navigate to the next group of opportunities, or view previously displayed opportunities.
- **Service Summary:** Displays the total number of open service requests, the number of escalations, and the average days to close services requests that have the severity levels of High, Medium, or Low.

- **Service Request Backlog:** Displays a brief description of the customer's problem, severity level, whether the problem was escalated, the number of days the issue has been open. You can navigate to the next group of service requests, or view previously displayed service requests.

3.2.1.2 Notes and Tasks Tab

- **Notes:** Displays notes and enables you to add notes to the lead.
- **Tasks:** Lists tasks and enables you to add tasks by clicking Add Another Row.

3.2.1.3 Contacts Tab

- **Suggested Contacts:** Displays contacts that are suggested by Oracle Sales as likely contacts for this lead, based on previous opportunities with the same product categories. Displays the name of the suggested contact, the contact's job title, telephone number, and e-mail address. Click the Add to Selected Contacts icon to add a suggested contact to Selected Contacts for the lead.
- **Selected Contacts:** Displays the contacts for this lead, including the contact name, job title, phone, and e-mail, and their role in their organization relative to this lead. Select the Primary checkbox if this contact is the primary contact for the lead. Click the Remove icon to delete the contact from the Selected Contacts list.

  Select a contact and then select Create Task, and click **Go** to create a task for yourself related to this contact.

  Select Send Proposal and click **Go** to create a proposal. See Section 3.12, "Proposals" for details on creating proposals.

  Select View Details and click **Go** to view the details for the selected contact.

  Click **Add Contact** to add a new contact.

  See Section 3.6, "Contacts" for details.

3.2.1.4 Products Tab

Displays the products associated with the lead, including unit of measure for items, product quantity, and the amount for the product. Click the Remove icon to delete the product from this list. Select a product to view product details.

3.2.1.5 Sales Cycle Tab

This tab is available if there is a sales methodology associated with the lead.

Displays the sales stages. These are the stages of your organization’s defined Sales Methodologies. They can include stages like: Stage 1: Qualify, Stage 2: Assess, Stage 3: Propose, and Stage 4: Close.

The stages have defined steps; these are listed for each stage displayed. You can choose to view All Stages, or the Current Stage. Each stage has an overall Sales Coach, and each step has it’s own specific Sales Coach. Click the Sales Coach icon to access. Sales Coaches are lists of questions related to each step of the sales stage.

Select the Completed checkbox as you complete each step.

Click View Worksheet to display the Sales Coaching worksheet for the selected stage or step in a text editor.

See Section 3.3, "Sales Methodologies" for details.

3.2.1.6 Sales Team Tab

A sales team is a group of salespeople assigned to the lead. You can modify leads you own, and your fellow sales team members can view or modify the lead. This tab displays the sales team members for the lead, listing the sales team member’s name, job title, sales group, telephone number, and e-mail.

The Full Access checkbox determines whether the team member can update or only view the lead. The default is selected.

The Do Not Reassign checkbox determines whether the sales team member can be reassigned by TAP. The default is unselected.

The Owner checkbox determines which sales team member owns the lead. There can be only one owner for each lead.

Click **Add Person** to add a sales team member.

Click the Remove icon to delete the sales team member from this list.

3.2.1.7 Proposals Tab

Displays the proposals that have been created for this lead, including the proposal name, a brief description, the proposal owner, the due date, and the status.

Click **Create Proposal**. Oracle Sales uses the functionality of Oracle Proposals. See the *Oracle Proposals User Guide* guide for details.

3.2.2 Creating an Opportunity from a Lead

You can convert only open leads into opportunities.

Creating an Opportunity from a Lead - Entry Points

- Sales Dashboard > Leads table > Click Full List > Select the Convert to Opportunity icon
- Sales Dashboard > Shortcuts > Click **Leads** > Select the Convert to Opportunity icon
- Update Lead page > Click **Convert to Opportunity**

Click the Convert to Opportunity Button or Icon

The Update Opportunity page is displayed, containing the information carried over from the original lead. This information includes:

- Lead name (which becomes the Opportunity Name)
- Customer Name
- Sales Methodology
- Sales Stage
- Currency
- Sales Channel
- Source Name
- Contact information
- Product information
- Sales Team information
- Notes

Your lead's status is changed to Converted to Opportunity.

Modify and Enter Information on the Update Opportunity Page

Enter the requested values. Click **Save**.

3.3 Sales Methodologies

Sales Methodologies capture your organization's sale cycle guidelines for leads (for lead qualification) and opportunities. Sales methodologies and their associated Sales Coaches are created by business analysts in your organization.

You can select a sales methodology when you create a lead or an opportunity. The methodology can apply to the lead only, the opportunity only, or a lead and its resulting opportunity. When you convert a lead to an opportunity, the sales methodology carries over to the opportunity.

You can create a lead or an opportunity without a methodology. If you create a lead or an opportunity without using a sales methodology, you can add one when you update the lead or opportunity. However, once you save a lead or opportunity with a selected sales methodology, the methodology is displayed as read-only text and cannot be modified.

This section contains:

- Section 3.3.1, "Using a Sales Methodology"

In Oracle Sales, sale methodologies consist of sales stages. For example, a methodology called Strategic Sales might have sales stages called:

- Stage 1: Initial Assessment
- Stage 2: Identify Business Drivers
- Stage 3: Propose Value Proposition
- Stage 4: Agreement and Close Deal

These stages can apply to a lead or an opportunity, or to both. In our example Stage 1: Initial Assessment might be accessible only from a lead. The rest of the sales methodology could then apply to the ensuing opportunity.

Within these stages are defined steps. These steps can contain tips, questions, or instructions. Stage 1: Initial Assessment might have steps like these depending on the setup of the methodology:

- Identify Industry Issues/Trends/Standards
- Determine Entry Strategy
- Initiate Contact and Appointment
- Assess High Level Business Needs
- Make Go/No Go Decision

Each step has a set of questions associated with it, known as a Sale Coach. These questions are designed to help you through the various stages of the methodology. They can be in the form of worksheets that you fill in as you advance through the stages of the sales cycle, or consist of instructional information. For example, the step Identify Industry Issues/Trends/Standards (the first step in our example Stage 1) might have questions like these associated with it:

- What industry is the prospect in?
- What are the key issues facing this industry?
- What standards exist or are emerging in the industry?
- Where do they stand in this industry?

3.3.1 Using a Sales Methodology

Using a Sales Methodology - Entry Points

- Sales Dashboard > Leads table > Click **Create**
- Shortcuts > Click **Leads** > Click **Create**
- Sales Dashboard > Top Opportunities table > Click **Create**
- Shortcuts > Click **Opportunities** > Click **Create New Opportunity**

Select a Sales Methodology

When creating a lead or an opportunity, select a sales methodology. When you click **Apply**, the methodology you selected for the lead or opportunity is displayed in the Update Lead or Update Opportunity page.

When you convert a lead to an opportunity, the information entered in the Sales Coach for the lead is accessible in the opportunity.

Access the Sales Methodology

Click **Sales Cycle** to access the Sales Coaches in the stages of the methodology.

You can select the various stages and underlying steps and click **View Worksheet** to view a printable version of the Sales Coaches. Use this as a worksheet to help you get started on your customer research before you enter the data into the online Sales Coaches. Once the Sales Coaches are complete, you can click **View Worksheet** to access this information.

Enter Data into Sales Coaches

To enter information into the Sales Coaches, click the Sales Coach icon for the desired stage (to access Sales Coaches for all of the steps) or step (to access the Sales Coach for that step only).

You can enter data into the Sales Coaches for the various stages and steps in the methodology prior to the lead or opportunity actually being in that stage. This allows you to capture information that is applicable to later stages of the lead or opportunity as soon as possible.

Once you have finished, click **Apply**.

Indicate When a Step or Stage is Complete

When you have completed the Sales Coach for a step or stage in a sales methodology, you can mark it as Complete by selecting the associated Completed checkbox. The stages in the Sales Coach and the actual stages of the lead or opportunity are not synchronized with each other. As a result, you can mark the stages and steps as complete regardless of the actual status of the stages of the lead or opportunity.

3.4 Opportunities

Opportunities are defined as pending sales that can be forecasted. Once an opportunity is identified, a sales representative or sales manager guides the opportunity through the sales process. An opportunity can be converted from a lead, or created as a new opportunity.

This section contains:

- Section 3.4.1, "Creating and Updating an Opportunity"
- Section 3.4.2, "Creating a Quote from an Opportunity"
- Section 3.4.3, "Closing an Opportunity"

3.4.1 Creating and Updating an Opportunity

Create Opportunity - Entry Points

- Sales Dashboard > Top Opportunities table > Click **Create**
- Shortcuts > Click **Opportunities** > Click **Create New Opportunity**
- Business Activities > Select Opportunity from the menu > Click **Go**

View Opportunities - Entry Points

- Sales Dashboard > Top Opportunities table > Click **Full List**

  This navigation takes you to the View Opportunities page, which enables you to view a list of all of your opportunities, and details for the opportunity that you select from the list. You can also search for opportunities from this page.

Update Opportunity - Entry Points

- Sales Dashboard > Top Opportunities table > Click **Full List** > Select an opportunity from the list or search for an opportunity to access the Update Opportunity page
- Sales Dashboard > Shortcuts > Click **Opportunities** > Select an opportunity from the list or search for a opportunity to access the Update Opportunity page, which contains customer and contact information, data on business activities, and a list of recent opportunities.
- Recent opportunities table from the Opportunity Update page

Enter Information on the Create Opportunity and Update Opportunity Pages

Enter the requested values. Click **Apply**. When you have finished working with the Update Opportunity page, click **Save**.

When creating an opportunity, note:

- **Methodology:** Captures your sales group's best practices. These are the steps you will follow to assist you in making sales. See Section 3.3, "Sales Methodologies" for details.
- **Win Probability:** The chance of winning the opportunity expressed as a percentage. Win probabilities are used to calculate weighted pipeline amounts (opportunity amount multiplied by win probability). Lower numbers imply opportunities with a lesser chance of closing; higher number imply a greater chance of closing the opportunity with a win.
- **Source:** Name of the marketing activity that generated the opportunity. For example, a sales campaign.

On the Opportunity Update page, note:

- **Address:** Primary address of the customer. After you create a opportunity, the address defaults to the primary address for the customer. However, you can select another address for the opportunity that is not the primary address.

- **Close Reason:** The reason the opportunity was closed. Enter a close reason only if an opportunity is closed.
- **Amount:** The total opportunity amount.
- **Source Name:** The marketing source name that generated the opportunity. For example, a direct mail campaign.
- **Forecast Amount:** The forecast amount, which is distributed to the individual product forecast based on proportion. For example:

  Existing Opportunity Forecast: 100
  Existing Product Forecast Line 1: 20
  Existing Product Forecast Line 2: 80

  If you change the opportunity forecast amount to 200, the result will be:

  New Opportunity Forecast: 200
  New Product Forecast Line 1: 40
  New Product Forecast Line 2: 160

3.4.1.1 Customer Analysis Tab

- **Products Under Contract:** Displays the product category for products for which your customers have service contracts. The product category name can be expanded to list the nested levels of product categories and items. The amount shown is the value of the service for products in that category that are under the service contract. The amounts roll up to the first level of the product hierarchy.
- **Recent Opportunities:** Displays the previous opportunities for the customer, showing the name of the opportunity, the close date, the current status, the owner, and the owner's telephone number. You can navigate to the next group of opportunities, or view previously displayed opportunities.
- **Service Summary:** Displays the total number of open service requests, the number of escalations, and the average days to close services requests that have the severity levels of High, Medium, or Low.
- **Service Request Backlog:** Displays a brief description of the customer's problem, severity level, whether the problem was escalated, the number of days the issue has been open. You can navigate to the next group of service requests, or view previously displayed service requests.

3.4.1.2 Notes and Tasks Tab

- **Notes:** Displays notes and enables you to add notes to the opportunity.

- **Tasks:** Lists tasks and enables you to add tasks by clicking Add Another Row.

3.4.1.3 Contacts Tab

- **Suggested Contacts:** Displays contacts that are suggested by Oracle Sales as likely contacts for this opportunity, based on previous opportunities with the same product category. Displays the name of the suggested contact, the contact's job title, telephone number, and e-mail address. Click the Add to Selected Contacts icon to add this suggested contact to Selected Contacts for the opportunity.
- **Selected Contacts:** Displays the contacts for this opportunity, including the contact name, job title, phone and email, their role in their organization relative to this opportunity. Select the Primary checkbox if this contact is the primary contact for the opportunity. Click the Remove icon to delete the contact from the Selected Contacts list.
- Select a contact and then select Create Task, and click **Go** to create a task for yourself related to this contact. Select Send Proposal and click **Go** to create a proposal. See Section 3.12, "Proposals" for details on creating proposals. Select View Details and click **Go** to view the details for the selected contact. See Section 3.6, "Contacts" for details on contacts.

Click **Add Contact** to add a new contact. See Section 3.6, "Contacts" for details.

3.4.1.4 Products Tab

Displays the products associated with the opportunity, including unit of measure for items, product quantity, the amount for the product, the close date for the opportunity, the Best, Forecast, and Worst forecasting numbers. Click the Remove icon to delete the product from this list. Select a product to view product details. See Section 3.8, "Forecasting" for details on forecasting.

Click **Add Product** to add a new product to the list by searching for a product category and clicking Select to add the product to the list.

- **Competitors:** Displays the names of competitors, competitor products, and the win/loss status (None, Won, Lost). Click the Remove icon to delete the competitor from this list.

Click **Add Competitor** to add a competitor to the list based on your search.

3.4.1.5 Sales Cycle Tab

This tab is available if there is a sales methodology associated with the opportunity.

Displays the sales stages. These are the stages of the sales cycle for your organization's defined Sales Methodologies. They can include stages like: Stage 1: Qualify, Stage 2: Assess, Stage 3: Propose, and Stage 4: Close.

The stages have defined steps; these are listed for each stage displayed. You can choose to view All Stages, or the Current Stage. Each stage has an overall Sales Coach, and each step has it's own specific Sales Coach. Click the Sales Coach icon to access. Sales Coaches are lists of questions related to each step of the sales stage. See Section 3.3, "Sales Methodologies" for details.

Select the Completed checkbox as you complete each step.

Click **View Worksheet** to display the Sales Coach worksheet for the selected stage or step in a text editor.

3.4.1.6 Sales Team Tab

Displays the sales team members for the opportunity. Lists the sales team member's name, job title, sales group, telephone number, and e-mail.

The Full Access checkbox determines whether the team member can update or only view the opportunity. The default is selected.

The Do Not Reassign checkbox determines whether the sales team member can be reassigned by TAP. The default is unselected, unless the team member is the owner, and then it is always selected.

The Owner checkbox determines which sales team member owns the opportunity. There can be only one owner for each opportunity.

Click **Add Person** to add a sales team member.

Click the Remove icon to delete the sales team member from this list.

3.4.1.7 Proposals and Quotes Tab

- **Proposals:** Displays the proposals that have been created for this opportunity, including the proposal name, a brief description, the proposal owner, the due date, and the status.

  Click **Create Proposal**. Oracle Sales uses the functionality of Oracle Proposals. See the *Oracle Proposals User Guide* guide for details.

- **Quotes:** Displays the quotes that have been created for this opportunity, including the quote name, the quote number, the owner, the status, the date created, the expiration date, the amount, and the currency.

Click **Create Quote**. Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* for details.

3.4.2 Creating a Quote from an Opportunity

Creating a Quote from an Opportunity - Entry Points

- Opportunity Update page > Click Proposals and Quotes > Click **Create Quote**

Creating a Quote

Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* for details.

The Create Quote from Opportunity page is displayed, containing the information carried over from the original opportunity. This information includes:

- Opportunity name (which becomes the Quote Name)
- Customer Name
- Customer Address
- Currency
- Sales Channel
- Source Name

3.4.3 Closing an Opportunity

Closing an Opportunity - Entry Points

- Sales Dashboard > Top Opportunities table > Click Full List > Select an opportunity from the list or search for an opportunity to access the Update Opportunity page
- Sales Dashboard > Shortcuts > Click **Opportunities** > Select an opportunity from the list or search for a opportunity to access the Update Opportunity page

Close the Opportunity on the Update Opportunity Page

Choose a close status in the Status field, and choose a Close Reason. Click **Save**.

3.5 Customers

A customer is an organization with which your company conducts business.

This section contains:

- Section 3.5.1, "Creating and Updating a Customer"

3.5.1 Creating and Updating a Customer

Create a Customer - Entry Points

- Sales Dashboard > Top Customers table > Click **Create**
- Sales Dashboard > Top Customers table > Click **Full List** > Click **Create**
- Shortcuts > Click **Customers** > Click **Create**

View a Customer - Entry Points

- Sales Dashboard > Shortcuts > Click **Customers**

  This navigation takes you to the View Customer page, which enables you to view key customer information and perform some updates, such as creating contacts and adding notes.

- Lead and Opportunity Detail page > Customer name
- Top Opportunity customer tables > Customer name

Update a Customer - Entry Points

- Sales Dashboard > Top Customers table > Click **Full List** > Select a customer from the list or search for a customer to access the Update Customer page
- Sales Dashboard > Shortcuts > Click **Customers** > Click **Full Update**

Enter Information on the Create Customer and Update Customer Pages

Enter the requested values. When you create a new customer, the only required field is the customer name.

You can:

- **Save and Add More Details:** Create customer and access the Update Customer page. When you have finished working with the Update Customer page, click **Save**

- **Apply and Create Another:** Create customer and return to the Create Customer page
- **Apply:** Create customer and return to previously viewed page

Oracle Sales uses Data Quality Management to prevent the redundant creation of customers. If you attempt to create a customer with a name that already exists, or is a close match to an existing customer name, you will receive a warning page. From this page, you can elect to either use the new customer, or select an existing customer to use.

When creating a customer, note:

- **Alias:** An alternate name for the customer. For example, Big Rock Industries might have an alias of BRI.
- **Status:** The default is Active; you can select a status of Inactive.
- **Address Purpose:** Select a purpose for the customer's address. This can be Bill to, Install at, or another purpose. You can add additional purposes.

On the Customer Update and View Customer pages, note:

- **Registry ID:** A system-generated unique identifier for the customer.
- **DUNS Number:** Tax identifier supplied by Dun & Bradstreet.
- **Industrial Classification:** The type of industry for the customer. The Standard Industry Code Standard Classification Systems, such as SIC. For example, the 1987 Edition of the U. S. Industrial Classification Codes.

3.5.1.1 Profile Tab

Displays products under contract, customer information, customer employee information, financial data, and business activities (opportunities, leads, proposals, orders, quotes, and sales campaigns) for customers.

3.5.1.2 Notes and Tasks Tab

- **Notes:** Displays notes and enables you to add notes to the customer.
- **Tasks:** Lists tasks and enables you to add tasks by clicking Add Another Row.

3.5.1.3 Contacts Tab

Displays contacts for this customer, including the name, job title, and contact information.

Click **Create Contact** to create a new contact. See Section 3.6, "Contacts" for details.

3.5.1.4 Address Book Tab

Displays address information for the customer, including address, e-mail, telephone, and website. You can add or modify this information.

3.5.1.5 Business Relationships Tab

Displays the business relationships that are important to your customer. These can be divisions, affiliates, partners, or others.

You can add a party with a relationship to your customer by selecting a type of relationship and clicking Go. Enter the company name and the start and end dates of the relationship and click **Apply** or **Save and Create Another**.

3.5.1.6 Classifications Tab

Displays the industrial classification for your customer. These can be based on lists of government-generated classifications for types of businesses.

You can locate a classification to add to your customer by entering a category of classifications and clicking Go. Or, you can create your own classification system and associate it with your customer.

Select the appropriate classification and click **Continue**. Add the end date for the applicability of the classification and click **Finish**.

3.5.1.7 Sales Team Tab

Displays the sales team members for the customer. Lists the sales team member’s name, job title, sales group, telephone number, and e-mail.

The Full Access checkbox determines whether the team member can update or only view the opportunity. The default is selected.

The Do Not Reassign checkbox determines whether the sales team member can be reassigned by TAP. The default is unselected, unless the team member is the owner, and then it is always selected.

Click **Add Person** to add a sales team member.

Click the Remove icon to delete the sales team member from this list.

3.6 Contacts

A contact is a person related to a customer. You create and update contacts within the context of a specific customer.

This section contains:

- Section 3.6.1, "Creating and Updating a Contact"

3.6.1 Creating and Updating a Contact

Create a Contact - Entry Points

- Sales Dashboard > Top Customers table > Select a customer from the list
- Sales Dashboard > Top Customers table > Click **Full List** > Select a customer from the list > Click **Create Contact**
- Shortcuts > Click **Customers** >Select a customer from the list > Click **Create Contact**
- Contacts tab for Lead or Opportunity > Click **Create Contact**

View a Contact - Entry Points

- Shortcuts > Click **Customers** > Select a customer from the list > Select a contact

  This navigation takes you to the View Contact page, which enables you to view key contact information and perform some updates.
- Lead and Opportunity > Customers

Update a Contact - Entry Points

- Sales Dashboard > Top Customers table > Click **Full List** > Select a customer from the list > Select a contact from the list of contacts > Click **Full Update**
- Sales Dashboard > Shortcuts > Click **Customers** > Select a customer from the list > Select a contact from the list of contacts > Click **Full Update**

Enter Information on the Create Contact and Update Contact Pages

Enter the requested values.

Oracle Sales uses Data Quality Management to prevent the redundant creation of contacts. If you attempt to create a contact with a name that already exists, or is a close match to an existing contact name, you will receive a warning page. From this page, you can elect to either use the new contact, or select an existing contact to use.

When creating an contact, note:

- **Status:** The default is Active; you can select a status of Inactive.
- **Address Purpose:** Select a purpose for the contact's address. This can be Bill to, Install at, or another purpose. You can add additional purposes.

On the Contact Update and View Contact pages, note:

- **End Date:** Date by which the contact should be removed.
- **Preferred Name:** Name that the contact prefers to use.

3.6.1.1 Business Activities Tab

Displays the business activities related to your contact. These can be Open Opportunities, Open Leads, Proposals Received, Quote Received, or Recent Orders and Returns. Select an activity from the menu and click **Go** to view details.

3.6.1.2 Address Book Tab

Displays address information for the customer, including address, e-mail, telephone, and website. You can add or modify this information.

3.6.1.3 Notes and Tasks Tab

- **Notes:** Displays notes and enables you to add notes to the contact.
- **Tasks:** Lists tasks and enables you to add tasks by clicking Add Another Row.

3.7 Sales Campaigns

Sales Campaign functionality enables sales managers to explore their installed base and historical customer data, and mine the data for cross-sell and up-sell opportunities. Sales Campaign is integrated with Oracle Marketing, Oracle Content Manager and Oracle Proposals to support the distribution of key proposals and sales material for the different sales initiatives.

When a sales campaign is launched, leads are generated for sales follow up. TAP assigns the appropriate sales representatives to the leads based on pre-defined rules. If these leads are converted to opportunities, the same sales representatives will handle the new opportunities. Each new opportunity is linked to the original sales campaign to allow the marketing and sales organizations to track the progress and success of sales initiatives.

This section contains:

- Section 3.7.1, "Creating a Sales Campaign Schedule"
- Section 3.7.2, "Viewing Sales Campaign Details"

3.7.1 Creating a Sales Campaign Schedule

Review the Sales Dashboard Content

The sales manager receives executive strategies and decides to analyze existing sales activities to predict the Leads and Sales Pipeline, and then plans additional sales promotional activities. On the Sales Dashboard, review the Sales Funnel**,** Latest Submitted Forecast, Top Customers, Top Opportunities, and Cross-Sell/Up-Sell Sales Campaigns.

Create a Sales Campaign Schedule- Entry Point

Sales Dashboard > Shortcuts > Click **Sales Campaigns** > Click **Create Sales Campaign**

Sales campaign schedules created in Oracle Sales use the Sales Schedule template only. A schedule template provides a framework that incudes predefined values and specifications for commonly used schedule attributes, such as the list template and approval requirements for the schedule.

You can also create a Sales Campaign schedule by logging into Oracle Marketing with the appropriate responsibility, navigating to the Campaign Dashboard, and clicking the Create Schedule shortcut link. Refer to the *Oracle Marketing User Guide* for details.

Associate a Time Line and Set an Objective

After defining a name for the sales campaign, define the related parent Marketing campaign. This allows Marketing to track the overall success of this sales effort as part of larger enterprise marketing activities. Specify the launch date to define the date from when leads must be generated (the Sales Campaign must be approved before leads can be generated). Define the sales methodology and objective to guide sales representatives. See Section 3.3, "Sales Methodologies" for more information on Sales Methodologies.

Select the Selling Product

Select a product or product category to use to generate sales leads. In the Products bin, click **Add Another Row** and define the target product or product category being cross sold or up sold in the sales effort.

You can associate an offer to a Sales Campaign schedule from the Campaign Workbench in Oracle Marketing. Refer to the *Oracle Marketing User Guide* for details.

Specify Target Accounts

To define the target group or audience for the Sales Campaign, define the set of accounts in the Target Accounts bin. Leads are generated for sales follow up against this target group.

To specify Target Accounts:

- Select a List Template to base your target group selection on. A List Template is a set of filter selections that satisfy a given sales effort purpose. For example, you may want to use a list template that provides the ability to build a cross-sell list based on Orders. Cross Sell/Up Sell based on Orders is the default list template available to sales campaigns.
- In the Selections region, enter the values for the selection conditions. To refine the Target Accounts selection, you can modify the selections by clicking Modify Selections.
- To generate and display the projected lead counts, click **Recalculate**. Save the details when you have reviewed the leads numbers and they are what you desire.
- Use the **Generate List** button to generate the target list and the Refresh List Status button to change the status of the list to Available. Statistics for the list are displayed for your reference.
- To remove individual contact entries from the generated list, click **Update Entries**.

Refer to the *Oracle Marketing User Guide* for details on List Templates and Selections.

Select Options

Select a Deduplication Rule

Select a deduplication rule to eliminate duplicates within the Target Accounts list. The rule is also used in suppressing the records from being targeted.

Enable Fatigue Rules

A fatigue rule defines maximum permissible contacts within a specified time period. An example of a fatigue rule is not to contact customers more than two times per month by any channel. These rules enable you to target customers so that they are more receptive to the marketing promotions and messages. If you want fatigue rules to be applied to the Sales Campaign, select the Enable Fatigue Rules check box in the Options region.

Click **Preview Fatigue** to view fatigue information in the form of a table and a chart. You can use the fatigue information to decide on the best time to launch a Sales Campaign, that is, when you will have the maximum accounts to target.

Associate Sales Collateral

You can define proposal templates that sales representatives can use to generate and fulfill proposals for the Sales Campaign leads. Oracle Sales integrates with Oracle Proposals to make this functionality available.

You can also define the content to be made available to sales representatives such as to help train on product strategy and cross-sell opportunity while working the leads. For this functionality, Oracle Sales integrates with Oracle Content Manager.

Associate Proposal Template

In the Sales Kit bin, select Proposals. You can preview the proposal template before deploying it.

Associate Content

The product/product category you select to generate leads in the Products bin drives the content. For example, it can drive the sales training content. This content is read-only.

Content items are selected from the Oracle Content Manager (OCM) repository. You can also create the content if you have the necessary access permissions for OCM folders. Refer to the *Oracle Content Manager User Guide* for details.

In the Sales Kit bin, select Content and add the content items.

3.7.2 Viewing Sales Campaign Details

View a Sales Campaign - Entry Points

Sales Dashboard > Cross-Sell/Up-Sell Sales Campaigns table > Click a Sales Campaign name

Sales Dashboard > Shortcuts > Click **Sales Campaigns** > Enter search criteria and click **Go** > Click a Sales Campaign name

The Sales Dashboard table displays summarized data regarding Sales Campaign schedules. This section contains data related to tracking the leads created from the corresponding Sales Campaign schedule and data related to tracking the opportunities that resulted from the corresponding Sales Campaign schedule.

From the Cross-Sell / Up-Sell Sales Campaigns Table

- Drill down Leads to review those associated with the Sales Campaign. All the leads are set to be scored as A leads to ensure they are prioritized in the workload for the sales representative queue
- Drill down Opportunities to review those associated with the Sales Campaign
- Drill down the Sales Campaign link to preview the associated Product, Target Accounts criteria, and Content

3.8 Forecasting

Oracle Sales provides sales organizations with flexibility in managing their forecast. Sales organizations can analyze their forecast data at geographic, opportunity, and product levels, thereby enabling management teams to judge the overall health of their organization. Via integration with opportunities in Oracle Sales, opportunity forecasts can be maintained within the opportunity itself. This provides instant visibility to management without the need for separately submitted forecasts, thereby reducing the time spent by sales representatives preparing their forecast. Product family forecasts can be provided to management dependent on, or independent of, the opportunity pipeline.

This section contains:

- Section 3.8.1, "Creating and Updating a Forecast"
- Section 3.8.2, "Forecasting as a Sales Manager"

Oracle Sales uses Best, Forecast, and Worst as its default forecasting terminology. These can be personalized by the administrator, if necessary, to contain your organization's internal terminology.

3.8.1 Creating and Updating a Forecast

Create and Update a Forecast - Entry Points

- Shortcuts > Click **Forecast**

Select Forecast Parameters

Use these parameters to determine which opportunities will be included in your forecast. Opportunities included in the forecast must be in a forecastable opportunity status, belong to the user for the Sales Group selected (or to a subordinate group for managers), have a forecast date that falls within the selected Period, and contain product lines that belong to a product category that maps to the selected Category.

Modify these parameters and click **Go** to change the composition of the forecast.

View the Opportunity Forecast Summary

This forecast summary is calculated based on the opportunity line pipeline and forecast values, from the Opportunity Forecast Detail, that make up the forecast. These values are rolled up based on the product category to which they belong.

View/Edit the Opportunity Forecast Detail

This worksheet allows you to view the specific opportunities (and the opportunity lines) that make up the forecast. The editable opportunity line forecast values (Best, Forecast, and Worst) are shared with the Opportunity page, meaning that any updates made to the opportunity forecast within the opportunity will instantly be reflected in the forecast page, and vice versa. You can view the details of the opportunity by clicking the opportunity name.

You can visually filter opportunities from the forecast by clicking Opportunity Filters, then entering your filter criteria. Opportunities that are filtered are not excluded from your forecast, but rolled into a summary line (identified as Other Opportunities) in the Opportunity Forecast Detail.

These totals from this worksheet roll up to the product categories and totals shown in the Opportunity Forecast Summary.

Create Forecast Notes

You can submit notes to your manager to provide additional detail along with your forecast by entering text in the box on the left of the Notes section, then clicking Add Note.

View Forecast History

You can view a summary of previous submissions of your forecast. Click the Submission Date for a forecast to view the details of a particular submission.

View/Edit Your Forecast Worksheet

This worksheet enables the user to provide forecast judgment, beyond the opportunity pipeline, at the product family level. You can begin with a saved Forecast Worksheet, from the last time the worksheet was saved or submitted, or default values from the opportunity pipeline, by selecting either Current Opportunity or Previously Saved from the Worksheet Default Values menu.

Save the Forecast or Submit the Forecast

After editing the desired forecast values, click **Save** to save the forecast to complete later, or click **Submit** to immediately submit the forecast to your manager. Once a worksheet is saved or submitted, Oracle Sales will calculate Judgment for each forecast value. Judgment is calculated as the difference between the product category forecast value entered in the Forecast Worksheet, and the corresponding value in the Opportunity Forecast Summary. Judgment helps you to determine the difference between a salesperson's forecast and the actual pipeline for that product category, which can indicate that a forecast is incorrect.

Download Your Forecast Worksheet

Click **Download Worksheet** copy the contents of the Forecast Worksheet to a spreadsheet.

3.8.2 Forecasting as a Sales Manager

As a sales manager or executive, your forecast will be similar to that of a sales representative, with the following differences:

- Option to default Direct Report Submitted forecast values (via the Worksheet Default Values menu) for each product category in the Forecast Worksheet. This is in addition to Previously Saved and Current Opportunity defaulting options.
- Inclusion of the name of your Direct Report who has forecast ownership for each opportunity in the Opportunity Worksheet Detail.
- Direct Reports Forecast, displaying the sum of each of the direct report's forecast by product category, and Direct Report Forecast Detail, displaying a summary of each direct report's individual forecast, with a link to additional detail.

3.9 Tasks

Oracle Sales enables you to add or modify tasks related to your sales activities. Your tasks are listed in the Calendar & Tasks section of the Sales Dashboard.

This section contains:

- Section 3.9.1, "Creating and Updating Tasks"

3.9.1 Creating and Updating Tasks

Create a Task - Entry Points

- Sales Dashboard > Calendar & Tasks table > Click **Create Task**
- Shortcuts > Click **Tasks** > Click **Add Another Row**
- Notes and Tasks Tab for Opportunity, Lead, Customer, or Contact > Click **Add Another Row**

View a Task - Entry Points

- Sales Dashboard > Calendar & Tasks table > Click the subject of the task

Update a Task - Entry Points

- Sales Dashboard > Calendar & Tasks table > Click the update icon

Enter Information on the Create Task and Update Task Pages

Enter the requested values. Click **Apply**. When you have finished, click **Apply**.

When creating a task, note:

- **Source Visibility:** Enables you to set the visibility level of the task: internal, private, or public.
- **Add Another Row:** Click to add an assignee to the task.

When updating a task, note:

- **Add Contact:** Click to add a contact to your task.
- **Set as Primary:** Select a contact and click Set as Primary to set a contact as the primary contact for the accomplishment of the task. Only one contact can be designated as primary.

3.10 Calendar

The calendar in Oracle Sales enables you to note appointments related to your sales activities. Your appointments are listed in the Calendar & Tasks section of the Sales Dashboard.

This section contains:

- Section 3.10.1, "Creating and Updating Appointments"

3.10.1 Creating and Updating Appointments

Create an Appointment - Entry Points

- Sales Dashboard > Calendar & Tasks table > Click **Create Appointment**
- Shortcuts > Click **Calendar** > Click **Create Appointment**

View an Appointment - Entry Points

- Sales Dashboard > Calendar & Tasks table > Click the subject of the appointment

Update an Appointment - Entry Points

- Sales Dashboard > Calendar & Tasks table > Click the subject of the appointment > Click Update

Enter Information on the Create Appointment and Update Appointment Pages

Enter the requested values. Click **Apply**. When you have finished, click **Apply**. Appointments that you add appear in the Calendar bin on the Sales Dashboard.

When creating an appointment, note:

- **Check Availability:** Click to check resource availability for your activity. Click **Add Location** to add a location for your appointment.

3.10.1.1 People and Resources Tab

Displays your calendar, and the calendar of the resource with which you are attempting to create an appointment. Click the search icon to search for people with which to book appointments. The people you add must be recognized resources. Once you find the person, select them and click **Select**. Then, click **Add** to add them to your appointment schedule.

Click **Show** or **Hide** to display or hide details about the people in your appointment schedule.

3.10.1.2 Details Tab

Displays the details associated with your appointment, such as the access to the appointment, and whether you want a reminder.

3.10.1.3 Repeating Tab

Enables you to specify if the appointment is a repeating event, like a regular weekly meeting.

3.10.1.4 Related Information Tab

Enables you to add notes and attachments to the appointment.

3.11 Quotes

Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* guide for details.

This section contains:

- Section 3.11.1, "Creating Quotes"

A quote can be created directly from an opportunity. An example for Oracle Sales:

1. A sales representative is working on a opportunity for ABC, Inc. ABC, Inc. requests a quote for printer products and services be mailed to them.
2. The sales representative generates the quote based on the prices of the products in the opportunity. Information from the opportunity is defaulted into the quote template.
3. The quote is printed and mailed to ABC, Inc.
4. The sales representative is able to view all quotes generated for that opportunity.

3.11.1 Creating Quotes

Create a Quote - Entry Points

- Sales Dashboard > Top Opportunities table > Select an opportunity >Proposals and Quotes tab > Click **Create Quote**
- Sales Dashboard > Top Opportunities table > Full List > Select an opportunity > Proposals and Quotes tab > Click **Create Quote**
- Shortcuts > Click **Quotes** > Click **Create Quote**

Enter Information on the Create Quote Page

Enter the requested values. Click **Apply**

3.12 Proposals

Oracle Sales uses the functionality of Oracle Proposals. See the *Oracle Proposals User Guide* guide for details.

This section contains:

- Section 3.12.1, "Creating Proposals"

A proposal can be created directly from a lead, an opportunity or a quote. An example for Oracle Sales:

1. A sales representative is working on an opportunity for XYZ, Inc. XYZ, Inc. requests a proposal be mailed to them.
2. The sales representative generates the proposal based on the opportunity details. Information from the opportunity is defaulted into the proposal template.
3. The proposal is printed and mailed to XYZ, Inc.
4. The sales representative is able to view all proposals generated for that opportunity.

3.12.1 Creating Proposals

Create a Proposal - Entry Points

- Sales Dashboard > Leads table > Click Rank category **>** Select a lead > Proposals tab > Click **Create Proposal**

- Sales Dashboard > Leads table > Full List > Select a lead > Proposals tab > Click **Create Proposal**
- Sales Dashboard > Top Opportunites table > Select an opportunity **>** Proposals and Quotes tab > Click **Create Proposal**
- Sales Dashboard > Top Opportunities table > Full List > Select an opportunity > Proposals and Quotes tab > Click **Create Proposal**
- Shortcuts > Click **Proposals** > Click **Create Proposal**

Enter Information on the Create Proposals Page

Enter the requested values. Click **Apply**.