

JD Edwards EnterpriseOne Applications

Customer Relationship Management for Sales Implementation
Guide

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Preface

Welcome to the JD Edwards EnterpriseOne Applications Customer Relationship Management Sales Implementation Guide.

Audience

This guide is intended for implementers and end users of the JD Edwards EnterpriseOne Customer Relationship Management Sales system.

JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne CRM Foundation
- JD Edwards EnterpriseOne Foundation-Address Book
- JD Edwards EnterpriseOne Sales Force Automation
- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards EnterpriseOne Supply Chain Management

JD Edwards EnterpriseOne Application Fundamentals

Additional essential information describing the setup and design of your system appears in a companion volume of documentation called *JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals 9.0 Implementation Guide*.

Customers must conform to the supported platforms for the release as detailed in the JD Edwards EnterpriseOne minimum technical requirements. In addition, JD Edwards EnterpriseOne may integrate, interface, or work in conjunction with other Oracle products. Refer to the cross-reference material in the Program Documentation at <http://oracle.com/contracts/index.html> for Program prerequisites and version cross-reference documents to assure compatibility of various Oracle products.

See Also:

- *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

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Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
<i>Italics</i>	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
Monospace	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

Introduction to JD Edwards EnterpriseOne CRM Sales Applications

This chapter contains the following topics:

- [Section 1.1, "JD Edwards EnterpriseOne CRM Sales Applications Overview"](#)
- [Section 1.2, "JD Edwards EnterpriseOne CRM Sales Applications Business Process"](#)
- [Section 1.3, "JD Edwards EnterpriseOne CRM Sales Application Integrations"](#)
- [Section 1.4, "JD Edwards EnterpriseOne CRM Sales Application Implementation"](#)

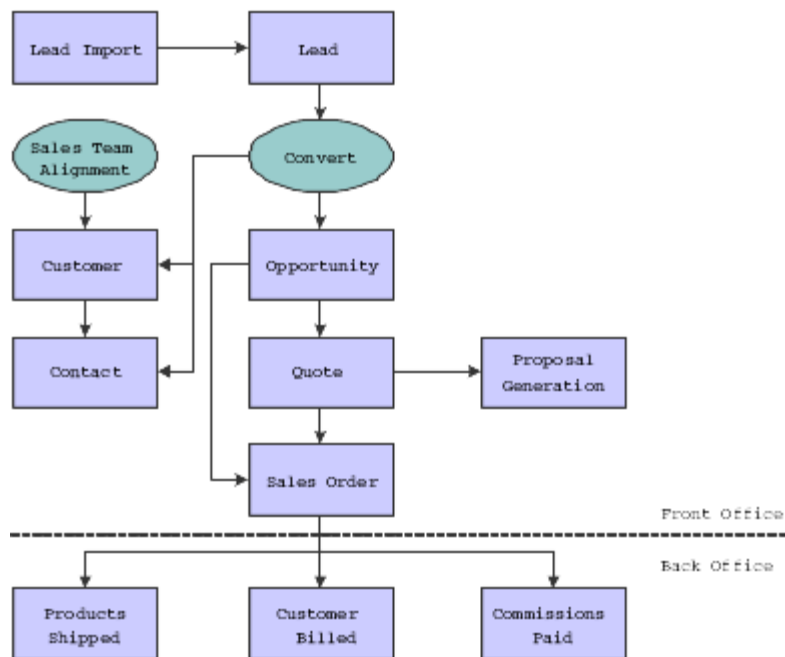
1.1 JD Edwards EnterpriseOne CRM Sales Applications Overview

You use the CRM Sales applications to successfully manage the organization's sales strategies, sales force, and sales opportunities. CRM Sales applications can be used to automate, standardize, maintain, and analyze sales information. For example, you can:

- Create qualification scripts that the sales force can use to determine whether a sales lead or opportunity is worth pursuing.
- Create sales methodologies, which the sales force can use to standardize and organize the activities associated with the sale of specific goods or services.
- Track and maintain sales leads.
- Track and maintain sales opportunities, customers and contacts.
- Create sales quotes and sales orders directly from a sales opportunity.
- Review and analyze the sales pipeline for many entities, such as employees, territories, or customers.
- Create and analyze sales forecasts, which can provide the organization with the information it needs to determine whether sales strategies are successful.
- Track and maintain information about competitors.
- Provide sales information to the manufacturing department to assist in demand planning.

1.2 JD Edwards EnterpriseOne CRM Sales Applications Business Process

This process flow illustrates the Lead to Cash business processes, which is supported by JD Edwards EnterpriseOne CRM Sales applications:

Figure 1–1 Lead to Cash Process Flow

We discuss these business processes in the business process chapters in this implementation guide.

1.3 JD Edwards EnterpriseOne CRM Sales Application Integrations

JD Edwards EnterpriseOne CRM Sales applications works with other JD Edwards EnterpriseOne applications to ensure that all information is fully integrated. JD Edwards EnterpriseOne CRM Sales applications integrate with these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne Accounts Receivable
- JD Edwards EnterpriseOne Address Book
- JD Edwards EnterpriseOne CRM Foundation
- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards EnterpriseOne Supply Chain Management

We discuss integration considerations in the implementation chapters of this implementation guide.

1.3.1 JD Edwards EnterpriseOne Accounts Receivable

JD Edwards EnterpriseOne CRM Sales applications integrate with JD Edwards EnterpriseOne Accounts Receivable to enable users to perform credit checks on sales opportunities. This enables sales representatives to determine, before the sale is

finalized, whether the prospective customer has sufficient credit to purchase the goods and services in which they are interested.

1.3.2 JD Edwards EnterpriseOne Address Book

JD Edwards EnterpriseOne CRM Sales applications integrate with JD Edwards EnterpriseOne Address Book in many areas, including:

- Employees
- Partners
- Contacts
- Customers
- Calendars
- Activities
- Action Plans

1.3.3 JD Edwards EnterpriseOne CRM Foundation

JD Edwards EnterpriseOne CRM Foundation applications provide the basis for the JD Edwards EnterpriseOne CRM Sales Force Automation system. CRM Constants are used to determine how the system processes sales information. You enter employees, customers, contacts, and partners using JD Edwards EnterpriseOne CRM Foundation applications. You also use product catalogues and items during the sales cycle. You can also use email groups and email merge functionality to keep in close contact with customers, partners, and sales team members. These applications are all part of the JD Edwards EnterpriseOne CRM Foundation product.

1.3.4 JD Edwards EnterpriseOne Sales Order Management

JD Edwards EnterpriseOne CRM Sales applications integrate closely with JD Edwards EnterpriseOne Sales Order Management. From the JD Edwards EnterpriseOne CRM Sales Force Automation system, you can generate sales quotes and sales orders. Once the sales quotes and orders have been generated, you use the JD Edwards EnterpriseOne Sales Order Management system to update and process the orders.

1.3.5 JD Edwards EnterpriseOne Supply Chain Management

The JD Edwards EnterpriseOne CRM Sales Force Automation system integrates with JD Edwards EnterpriseOne Supply Chain Management, enabling manufacturing organizations to utilize the information that is created by sales forecasts when determining the future demand for products. Using the SCBM Outbound Processor program, the JD Edwards EnterpriseOne Supply Chain Management systems can identify the active sales opportunities, and use that information to forecast product demand.

1.4 JD Edwards EnterpriseOne CRM Sales Application Implementation

This section provides an overview of the steps that are required to implement JD Edwards EnterpriseOne CRM Sales applications.

In the planning phase of your implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne CRM Sales applications, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time that is required to search for and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools Software Updates Guide*

For information about the Oracle Business Accelerator solution for implementation of JD Edwards EnterpriseOne Customer Relationship Management, review the documentation available.

See http://docs.oracle.com/cd/E24705_01/index.htm

1.4.1 Global Implementation Steps

The suggested global implementation steps for JD Edwards EnterpriseOne CRM products are:

1. Set up global User Defined Code (UDC) tables.
See *JD Edwards EnterpriseOne Tools Foundation Guide*.
2. Set up companies, fiscal date patterns, and business units.
See "Setting Up Organizations" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
3. Set up next numbers.
See *JD Edwards EnterpriseOne Tools Foundation Guide*
4. (Optional) Set up accounts, and the chart of accounts.
See "Creating the Chart of Accounts" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
5. (Optional) Set up the General Accounting constants.
See "Setting Up the General Accounting System" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.
6. (Optional) Set up multicurrency processing, including currency codes and exchange rates.
See "Setting Up General Accounting for Multicurrency Processing" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.
See "Setting Up Exchange Rates" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.
7. (Optional) Set up ledger type rules.
See "Setting Up the General Accounting System", in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.
8. "Setting Up Ledger Type Rules for General Accounting", in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*
9. "Forms Used to Set Up Ledger Type Rules" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*
10. Set up branch/plant constants.
See "Setting Up the Inventory Management System" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

1.4.2 Implementation Steps for CRM Sales Applications

The implementation steps for CRM Sales applications are:

1. Set up CRM Constants.

See "Setting Up the CRM Foundation System" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

2. Set up CRM Sales application UDCs

See [Setting Up Sales Fundamentals](#).

3. Set up territories and industry groupings.

See [Setting Up Sales Fundamentals](#).

4. Set up sales methodologies.

See [Setting Up Sales Fundamentals](#).

5. Set up qualification scripts.

See [Setting Up Sales Fundamentals](#).

Understanding CRM Sales Applications

This chapter contains the following topics:

- [Section 2.1, "Sales Force Automation Setup"](#)
- [Section 2.2, "The Sales Cycle"](#)
- [Section 2.3, "Sales Measurement Tools"](#)
- [Section 2.4, "Key People in Sales"](#)
- [Section 2.5, "Sales Proposals"](#)
- [Section 2.6, "Hotkeys for Sales Force Automation"](#)

2.1 Sales Force Automation Setup

Before sales representatives can complete the steps in the sales cycle, an organization must define sales strategies, methodologies, and processes. When you develop well-defined and organized sales strategies, you enable the sales teams to be more effective and efficient when selling the organization's products and services. These foundational setup pieces include:

- Sales methodologies.
- Qualification parameters.
- Industry groupings and territories.
- Sales team alignment.

2.1.1 Sales Methodologies

You use sales methodologies to define the typical steps that a sales representative might complete to close a particular type of sale. Sales methodologies define the milestones associated with a type of sale, and they assist sales representatives in completing all of the predefined tasks and activities that have proved to help close a specified type of sale.

Sales methodologies are also used to calculate the amount of potential revenue that is associated with each active opportunity for pipeline purposes. When you create a methodology, you create sales cycle steps for that methodology. You then assign a probability percentage to each sales cycle step. When a sales representative creates a sales opportunity, they associate it with a sales cycle step. When the sales representative enters a monetary amount on the opportunity, the system calculates, using the probability from the sales cycle setup, the amount of potential revenue associated with the opportunity.

Using sales methodologies with predefined milestones, activities, and action plans helps the sales team to focus on the right task at the right time. It also helps them manage each potential sale effectively and efficiently.

You can also set up sales drivers for each sales methodology. Sales drivers represent the issues that are important to a customer, with regard to a particular sales. You can also assign importance to each sales driver.

2.1.2 Qualification Parameters

To be as efficient as possible, you want the sales organization to spend the majority of its time on potential customers who are both willing and able to purchase goods and services. Using qualification scripts, you can define the parameters, or guidelines, that the organization uses to determine whether a lead or opportunity should be pursued.

Sales representatives use the script, which includes product-specific questions, to score the lead or opportunity. If the score meets or exceeds the goal, the lead or opportunity is considered qualified. By determining early in the sales cycle that a lead or opportunity is not willing or able to do business with the organization, you can save valuable time and money.

2.1.3 Industry Groupings and Territories

If the organization has a large sales force, it is probable that the sales teams are organized by geographic locations and by product or industry expertise. Using the Territory Application program (P90CA140) and the Industry Grouping Application program (P90CA12A), you can define each industry grouping that the organization uses, as well as the geographic territories that the sales team supports.

You can then add sales team members to each territory and industry grouping, and activate the sales team members using effective dating.

2.1.4 Sales Force Alignment

After you have set up sales territories and industries, and assigned sales team members to those territories and industries, you can allow the system to automatically align the sales force. The system identifies the territory and industry groupings that are associated with each customer, and assigns to the customer all of the sales team members who are currently active in *both* the industry grouping *and* the territory. The system updates the customer sales team each time that a customer record is added or changed.

Alternatively, you can run the Sales Team Alignment TC program (R90CA18A, version XJDE0007) to update customer sales teams. You might choose to run this program if the sales territories or industry groupings are reorganized, or if sales team members leave the organization.

Lastly, you can exclude customer records from the automated alignment process. If you exclude a customer from the automated alignment process, you must assign sales team members to the customer manually.

2.2 The Sales Cycle

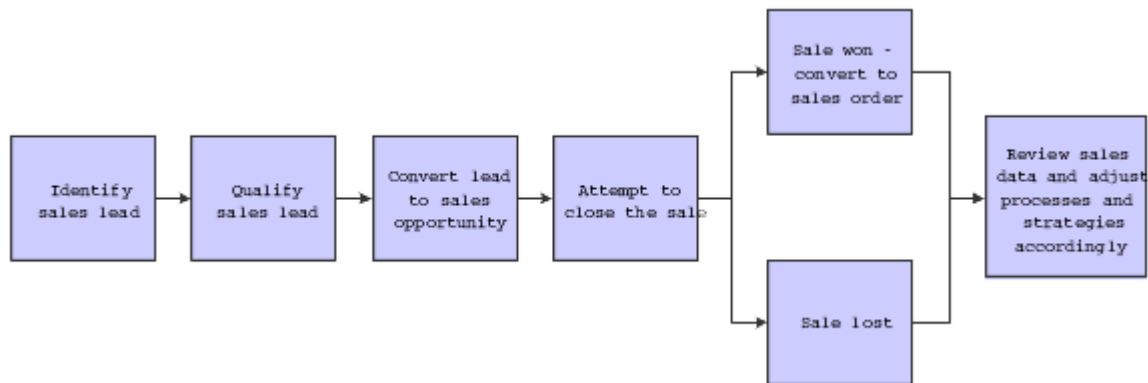
After you have set up the sales organization, sales teams can begin to sell products and services using the sales processes and strategies that you have defined. The sales cycle encompasses all of the steps that a sales team member completes in order to sell

products or services. The sales cycle, also known as the lead-to-delivery process, includes:

- Sourcing and tracking sales leads.
- Qualifying leads.
- Converting leads to sales opportunities.
- Converting sales opportunities into revenue.

This graphic illustrates the sales cycle:

Figure 2–1 The sales cycle



2.2.1 Sales Leads

A sales lead is the first point of contact that an organization has with a customer or prospective customer. An organization might receive sales leads from several sources such as purchased lists, sales and marketing events, partner contacts, personal referrals, or through continuing business with an existing customer.

Using the CRM - Manage Leads program (P90CB010), you can enter and track sales leads. You can also import a list of leads using the Import Leads program (P90CB015).

You can associate activities and action plans with leads. Activities are the typical tasks that a sales representative should complete for the specified type of sales lead. Action plans are lists of predefined activities that you want to associate with a lead. When you associate an action plan with a lead, the system creates the activities associated with the action plan for the selected lead. You can then view these activities using the calendaring functions from the JD Edwards EnterpriseOne Address Book system. Action plans and activities can help sales representatives organize their workloads, ensuring that the appropriate tasks are completed at the appropriate time.

2.2.2 Lead Conversion

After you enter a lead into the system, you can qualify the lead to determine whether it should be pursued. Using the CRM - Manage Qualification Scripts program (P90CB040), you set up qualification scripts that provide sales representatives with a quantifiable method to determine whether the lead is worth pursuing.

Qualification scripts contain predefined questions and answers. These questions, and their associated answers, are assigned values. When the sales representative enters the answers into the system, the lead's qualification score is automatically calculated. The sales representative can then compare the lead's score to the predefined qualification goal. If the score meets or exceeds the goal, the lead is considered qualified and should be pursued. The qualification goal is simply a guideline for the representative to use when determining whether to pursue the lead.

Once you have determined that the lead is qualified, you can convert the lead into an opportunity. With the click of a button, you can automatically generate a sales opportunity record directly from the sales lead. When you convert a lead, the system creates a customer record, a contact record, and an opportunity record. You then use the Manage Opportunities program (P90CB020) to track and process additional information about the potential sale.

Each sales opportunity that you create must be associated with a sales methodology. The sales cycle that is associated with the methodology is used to determine the probability that the opportunity will be converted to a sale, the expected close date of the opportunity, and the predefined action plans or activities that should be completed for the opportunity. You can also enter additional information for each sales opportunity, such as:

- **Qualification information**

If necessary, you can qualify the opportunity record. Though opportunities are typically created during lead conversion from a qualified lead record, there are times when you will enter an opportunity without having had a lead record. In these instances, you can use qualification scripts to qualify the opportunity to determine whether it should be pursued further.

- **Contact information**

You can include each contact that is associated with the customer, along with their contact information. You can also include influence information, which sales representatives can use to identify the key players in a sales deal, along with their feelings about the transaction.

- **Product information**

You can attach specific products or product catalogs to a sales opportunity. You can enter the quantities that the customer is interested in purchasing, along with the beginning price that you are offering to the customer. If you enter specific items, quantities, and prices, the system uses this information to calculate the potential revenue associated with the opportunity.

- **Sales team information**

When you create a sales opportunity, the system automatically assigns the active sales team members from the associated customer to the opportunity. You can manually add or remove sales team members from the opportunity, assign roles, and specify whether the sales team member is eligible for commission.

- **Cost information**

You can enter all of the time spent and costs incurred by sales team members while working on the sales opportunity. You can enter a budgeted amount for each opportunity and track whether the costs associated with the opportunity have exceeded this amount.

- **Sales driver information**

You can enter the factors that have the greatest impact on the customer's decision to purchase goods or services from an organization. These factors are called sales drivers. You can also rank these sales drivers in order of importance.

- Activity information

When you create an opportunity, either manually or through the lead conversion process, you must assign a sales methodology to the record. The sales methodology might have action plans associated with it. However, you might find it necessary to enter additional activities or link additional action plans that contain activities that are specific to the opportunity. You can review these activities using the calendaring function from the JD Edwards EnterpriseOne Address Book system.

- Influencer information

You can enter influencers, which are used to identify the important people that are involved in a sales opportunity. When you add an influencer to the opportunity, you can also enter information about their feelings regarding the sale. For example, you can enter an influencer and also enter that the person is enthusiastic about the sale.

- Competitor information

You can attach a competitor to a sales opportunity. By attaching competitors to an opportunity, sales representatives can easily determine who they are working against when trying to close a sale.

Important: In previous releases of the JD Edwards EnterpriseOne Sales Force Automation system, competitor data was managed using the P6917901 program. As of release 8.11 SP1, you use the Competitor Find Browse program (P90CA061) and the Competitor Detail program (P90CA060) to manage competitor data.

2.2.3 Sales Order Creation

As sales representatives progress through the sales cycle, they continue to enter and track information using the opportunity record. As the cycle progresses, customers might request a quote for the goods in which they are interested. Using the Convert to Quote button, you can automatically generate a sales quote from the opportunity record.

After you create the quote, you can access it from the opportunity record; however, the sales quote is stored in the JD Edwards EnterpriseOne Sales Order Management system. You can create as many quotes as necessary for an opportunity.

Lastly, if the customer decides to purchase goods or services, click the Convert to Sales Order button to convert the opportunity to a sales order. Like a sales quote, the sales order is also stored and managed from the JD Edwards EnterpriseOne Sales Order Management system. However, you can access the sales order directly from the opportunity record. If necessary, you can create multiple sales orders for an opportunity.

Once you have generated the sales order, you can update pricing, shipping, item, and customer information using the JD Edwards EnterpriseOne Sales Order Management system. When you have completed all updates to the sales order, you can submit the order for processing.

2.3 Sales Measurement Tools

This section provides an overview of the tools that can help the organization measure the productivity of the sales force.

The last step in the sales cycle is to review and analyze sales data to determine where the organization's strengths lie, and what its weaknesses are. When you analyze sales data, you might determine that the sales processes and strategies must be changed in order for the organization to be successful. Sales measurement tools include:

- Sales pipelines
- Sales forecasts
- Sales reports

2.3.1 Sales Pipelines

Sales pipelines provide you with an at-a-glance view of the amount of revenue that is currently in process, and might be realized in the near future. The sales pipeline includes the revenue amounts that are associated with active sales opportunities, and is divided into categories by the probability that the opportunity will close successfully. For example, if an opportunity has a close probability of 25 percent, the revenue associated with that opportunity is included in the 20–29 percent category of the sales pipeline.

You can review the sales pipeline for individual employees, customers, contacts, industry groupings, territories, forecasts, and competitors. Reviewing the pipeline for each of these entities can provide you with:

- Pipeline information for employees.
Reviewing the pipelines for individual employees gives you an easy and fast method of comparing the members of the sales organization to determine which sales teams and sales team members are the most productive.
- Pipeline information for customers.
Reviewing customer pipelines can help you to determine which customers are providing the organization with the most potential revenue. This information can help you determine whether specific customers need additional sales team members to support them, which customers might be valuable business references, or whether specific customers should receive additional or special attention from the organization.
- Pipeline information for competitors.
Reviewing the sales pipeline for competitors can help you determine which competitors are effecting the sales organization the most. When reviewing competitor pipelines, you might find that a certain competitor stands out and is involved in more sales deals than any other organization. You can then take the necessary steps, such as pricing or product changes, to compete effectively with the specified competitor.
- Pipeline information for industry groupings and territories.
Reviewing the pipelines for industry groupings and territories can help you determine which products, in which areas, are providing the organization with the most potential revenue. If you find that the pipeline for a particular industry or territory is significantly larger than others, you can focus resources on those areas.

2.3.2 Sales Forecasts

You can also use sales forecasts to help measure the sales organization's productivity. Using the Manage Forecasts program (P90CB060), you select a group of sales opportunities and create a sales forecast based on those opportunities. The system calculates the amount of revenue that is associated with the selected group of opportunities. If necessary, you can override this amount. Because you control which opportunities are included in the forecast, and you can override revenue amounts, the sales forecast typically provides you with a more accurate view of potential revenue than the sales pipeline.

You can update a sales forecast as many times as necessary. When you feel that the forecast accurately depicts future sales, you can freeze the forecast. When you freeze a forecast, the system creates a point-in-time record of the opportunities that are associated with the forecast. You can use this information to compare actual revenue to forecasted revenue and analyze the causes of large discrepancies between these two amounts.

For example, if a large opportunity is lost after a forecast is frozen, the actual and forecasted revenue amounts will likely be very different. You can compare the opportunities that were included in the forecast, as they were when the forecast was frozen, against the actual opportunities that closed during the specified period. By reviewing the forecasted opportunities against those that actually closed, you can identify which opportunities were not closed as planned. You can then analyze this information and take action as necessary. You can also compare a frozen forecast against sales orders for the period or commission totals.

You can also specify whether you feel that a sales forecast is accurate enough to be considered by the manufacturing organization in their demand forecasting process by selecting the Approve for Demand Management option on the forecast. The manufacturing department can use the SCBM Outbound Processor program (R34A700) to extract sales opportunity information for demand forecasting. Depending on the SCBM Outbound Processor settings, they can extract information for inclusion in the demand forecasting process in one of these formats:

- Opportunities that are associated with a sales forecast for a specified date.
- Opportunities that are associated with a frozen forecast for a specified date.

2.3.3 Sales Reports

The JD Edwards EnterpriseOne CRM Sales Force Automation system provides you with numerous reports to help you analyze the organization's sales information. These sales-related reports, listed by category, are available:

- Lead Reports:
 - Lead Tracking Report.
 - Lead by Product Category Report.
 - Lead by Lead Source Report.
 - Five reports are available to print lead addresses in different formats.
- Opportunity Reports:
 - Opportunities by Channels Report.
 - Opportunities by Probability Report.
 - Opportunities by Probability for a Sales Rep Report.

- Opportunities by Territories Report.
- Opportunities by Channels for a Sales Rep Report.
- Opportunity Summary Report.
- Forecast Reports:
 - Forecast - Frozen Forecast Status Report.
 - Opportunity Pipeline Review by Close Date Report.
- Action Plans and Activities Reports:
 - Action Plan List Report.
 - Activities for a Customer Contact Report.
 - Periodic Planner Report.
- Customer Reports:
 - Customer Contact Summary Report.
 - Customer Summary - Selected Report.
 - Contacts for a Customer Report.
- Additional Reports:
 - Competitor Item Sheet Detail Report.
 - Employee Phone List Report.
 - Partner Listing Report.
 - Product Catalog List Report.
 - Three reports are available to print contact addresses in different formats.

2.4 Key People in Sales

To sell goods and services effectively, you must have a thorough understanding of who the key players are in each deal. The JD Edwards EnterpriseOne CRM Sales Force Automation system enables you to track and manage all of the people that can effect the success of a sale, including:

- Employees
- Partners
- Customers
- Influencers
- Competitors

2.4.1 Employees

Before you can assign an employee to a sales team, the employee must exist in the JD Edwards EnterpriseOne Address Book system. Using the Manage Employees program (P90CA040), you can enter employees into the system, and include all CRM-related information at the time of entry. The Manage Employees program provides users with a single entry point that they can use to enter and maintain CRM-related employee information.

2.4.2 Partners

You can also include partners on sales teams. However, before you can assign a partner to a sales team, the partner must exist in the JD Edwards EnterpriseOne Address Book system. Using the Address Book program (P01012), you can enter partners into the system. When you enter a partner, the search type must be PA.

2.4.3 Customers

In order to sell effectively, you must understand customers, their businesses, and their business needs. You use the CRM Customer program (P90CA080) to enter customers into the JD Edwards EnterpriseOne Address Book system. When you enter a customer into the system, you can enter multiple contacts, addresses, phone numbers, email addresses, and attachments for each customer. The CRM Customer program provides users with a single entry point to review and update all CRM-related customer information.

2.4.4 Influencers

Influencers are the most important customers, contacts, or employees involved in a sales opportunity. Influencers are the people who play an active role in determining whether the deal is closed, and the sale is completed. You can track influencers, their roles within their organizations, and their perceptions and feelings about the deal. You enter influencer information for each opportunity.

2.4.5 Competitors

Understanding the competition, what they can deliver to customers, and for what price, can be a significant advantage when trying to win business. Using the Competitor Application program (P90CA061), you can track this information. You can attach products, product catalogs, or attachments to competitor records, which can be used to determine how the competitor compares to your organization.

2.5 Sales Proposals

You can use the proposal generation feature to produce customized letters and sales proposals. This feature enables you to mix and match predefined document components, which contain links to data that is stored in JD Edwards EnterpriseOne tables. You specify the components, and the order in which they appear, and the system generates customized documents based on the component setup. For example, you can create a customized letter for each customer that contains the company logo, a description of a new product, and pricing information.

The proposal generation feature uses templates that let you easily attach document parts (such as a quote detail and quote summary) to a proposal document. For example, you can generate a proposal that include the address to which the customer's last order was shipped, the estimated or actual order start dates, and any special delivery instructions the customer has specified.

To supplement the templates that the JD Edwards EnterpriseOne system provides, you can create new templates. Before you create a template, you must create the document parts, or components, that are used in the template. Components can consist of text and images. You then create a template by attaching components. As needs change, you can modify or delete templates.

If you generate a proposal directly from a quote order or sales order, the system attaches the proposal to the order as a media objects. You can make proposals available online, email the proposal, or print the proposal.

You use these programs to create and maintain proposals:

- Mail Merge and Doc Generation Maintenance Application program (P980040).
- Create MailMerge Documents program (P980013).
- Maintain MailMerge Documents program (P980014).
- MailMerge Documents Search and Select program (P980014S).

Note (Release 9.1 Update): The Mail Merge feature has been deprecated as part of bug 28911500.

2.6 Hotkeys for Sales Force Automation

You can navigate and interact with JD Edwards EnterpriseOne applications using hotkeys for quicker, more efficient workflow. Hotkeys are designed to work in conjunction with your browser's existing hotkeys, and enable you to work solely using the keyboard.

There are several hotkeys that you can use to navigate through all JD Edwards EnterpriseOne applications. For example, you can press the Tab key on your keyboard to move the focus to the next field, button, or hotlink on any JD Edwards EnterpriseOne form.

In addition to the hotkeys that you can use to navigate through all JD Edwards EnterpriseOne applications, additional hotkeys are available that enable you to use buttons on Sales Force Automation forms without using your mouse. To use the Sales Force Automation hotkeys, you must hold down the Shift and the Ctrl buttons on your keyboard while you press the hotkey. For example, Q is the hotkey for the Convert to Quote button. To use the Convert To Quote function on the Opportunity - Manage {Opportunity Name} form without using your mouse, you press Shift + Ctrl + Q on your keyboard.

This table lists all of the Sales Force Automation hotkeys:

Button	Hotkey
Assign Industry	N
Assign Opportunity	N
Assign Partner	N
Assign Postal Code	N
Assign Product Interest	N
Assign Sales Team	N
Assign State	N
Collapse Hierarchy	Y
Convert Lead	N
Convert To Quote	Q
Convert To Sales Order	N
Credit Check	D

Button	Hotkey
Expand Hierarchy	Y
Find Active Records	D
Find Inactive Records	N
Finish	N
Freeze	X
Link Action Plan	L
Sales Group Details	L

See Also:

- *JD Edwards EnterpriseOne Tools Foundation Guide.*

Setting Up Sales Fundamentals

This chapter contains the following topics:

- [Section 3.1, "Understanding the JD Edwards EnterpriseOne CRM Sales Force Automation System"](#)
- [Section 3.2, "Setting Up User Defined Codes for CRM Sales Applications"](#)
- [Section 3.3, "Setting Up Territories and Industry Groupings"](#)
- [Section 3.4, "Setting Up Sales Methodologies"](#)
- [Section 3.5, "Setting Up Qualification Scripts"](#)

3.1 Understanding the JD Edwards EnterpriseOne CRM Sales Force Automation System

Before you can process sales information, set up sales teams, and enter leads and opportunities, you must set up the sales system. The CRM_Constants program (P90CA000) is used to drive sales processing. These constants determine the way in which the system processes sales information and the sales features that the organization uses.

You must also review, and at times, add information to sales-specific user defined code (UDC) tables. The majority of the UDC tables that are associated with the sales system can be found under system code 90CB.

If the sales force is defined by geographic areas, or industry specialties, you must also set up territories and industry groupings. This information is used when you set up and align the sales force.

You can create sales methodologies to assist the sales team members in organizing and carrying out sales activities, tasks, and strategies. Sales methodologies enable you to attach predefined activities to a sales team member at each step of the sales cycle for a particular product or service. Sales cycle steps from the associated sales methodologies are also used to calculate the weighted revenue potential for each active opportunity.

Lastly, you can set up qualification scripts. You use qualification scripts to determine whether the leads and opportunities that the sales organization generates are worth pursuing. Using qualification scripts, you can define questions, answers, and goals for each type of sale. When you complete a script, the system calculates the lead or opportunity's qualification score. The sales team member can use this score to determine whether the lead or opportunity is worth pursuing.

3.1.1 Prerequisites

Before you complete the tasks in this section:

Set up the CRM Constants.

You should also have a complete understanding of the JD Edwards EnterpriseOne CRM Foundation system, and should review the CRM Application Fundamentals documentation to determine whether additional setup is necessary to process sales information correctly.

See "Setting Up the CRM Foundation System", in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

"Setting Up CRM Constants", in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

3.2 Setting Up User Defined Codes for CRM Sales Applications

This section provides an overview of the user-defined codes (UDCs) for CRM Sales applications, and discusses how to set up UDCs for CRM Sales Applications.

3.2.1 Understanding UDCs for CRM Sales Applications

UDCs are used throughout the JD Edwards EnterpriseOne system to store values that the organization uses to process business information. Before you begin processing information, you should review the UDCs that are associated with the systems the organization uses, and verify that the appropriate values are available.

For the JD Edwards EnterpriseOne CRM Sales Force Automation system (system code 90CB), these UDCs are available:

UDC Table	Description
90CB/CA - Sales Driver Category	<p>You set up sales driver categories to define the reasons that a potential customer might purchase products or services from the organization. Typically, sales drivers are the important reasons that sales representatives need to focus on in order to successfully sell to the customer.</p> <p>For example, a common concern that customers have is whether the organization has enough inventory to satisfy their needs on an ongoing basis. Therefore, you can set up a sales driver category code to represent Inventory.</p>
90CB/CC - CRM Sold To Ship To	<p>You use CRM Sold To Ship To codes to determine which customer to use when determining which members of the sales force to assign to a sales opportunity. A sales opportunity might have one customer set as the Sold To customer, and a different customer set as the Ship To customer. The system assigns sales team members from either the Sold To customer's sales team, the Ship To customer's sales team, or both, depending on this value.</p> <p>You should not change these codes.</p>
90CB/CE - Category Expense	<p>You use category expense codes to specify the types of expenses that are incurred during the sales process. Examples of category expense codes might include air travel, hotel, and per diem.</p>

UDC Table	Description
90CB/CG - Category Time	You use category time codes to specify how a sales representative spends time during the sales process. Examples of category time codes might include demonstrations, development, or setup time.
90CB/CT - Cost Type	You use cost type codes to specify whether a cost or expense is an amount of time or a monetary amount.
90CB/FC - Function Code	<p>You set up function codes to specify the roles that contacts have in their respective organizations.</p> <p>For example, you might set up function codes to represent roles such as CEO, CIO, Staff, Supervisor, or Owner.</p>
90CB/FS - Forecast Status	You set up forecast status codes to specify whether a sales forecast has been submitted or is currently open for revision. Once a forecast has been submitted, it cannot be revised.
90CB/IM - Sales Driver Importance	<p>You set up sales driver importance codes to identify how important a particular sales driver is to a potential customer.</p> <p>For example, you might set up codes 1 through 5, where 1 is the most important, and 5 is the least important. When you enter a sales driver category code on a lead or opportunity, you can then assign an importance code, which will assist the sales representative in knowing how important that driver is to the deal.</p>
90CB/LR - Lost Reason	<p>You use lost reason codes to specify the reason that a lead or opportunity was not closed. You can then use this information to analyze the reasons why the sales force is losing business.</p> <p>For example, you might find that a high percentage of sales are lost because the price is too high. This information might cause you to research the market to verify whether the prices that the organization has set are in line with prices of competitors.</p>
90CB/LS - Lead Source	<p>You use lead source codes to specify how a lead was identified to an organization.</p> <p>For example, you might set up a code for a particular trade show. You can then analyze the number of leads that were sourced from that trade show to determine whether to attend the show in upcoming years.</p>
90CB/PM - Payment Method	You use payment methods to specify how a person is paid for the expense
90CB/QT - Qualification Question Type	You use qualification question type codes to specify the type of question you are asking. The code is informational only, and is used to assist the sales representative in understanding the context of the question.
90CB/SL - Sponsorship Level	You use sponsorship level codes to describe how an influencer endorses the associated sales deal. For example, you use sponsorship level codes to specify that an influencer is an advocate, an opponent, enthusiastic, or pessimistic about the deal.
90CB/ST - Sponsorship Type	You use sponsorship type codes to specify the role that an influencer plays in the sales deal. Examples of sponsorship type codes include executive, financial, or technical.
90CB/ST - Status	You use status codes to specify the status of a lead. Examples of status codes include Active and Converted.

You might also want to review the UDCs that are associated with other CRM system codes. These additional system codes are included in the CRM product family:

- 90B - CRM Financial Services.
- 90CA - CRM Foundation.
- 90CD - CRM Service Management.
- 90CE - CRM Solution Advisor.
- 90CF - CRM Call Scripting.
- 90CG - CRM Case Management.
- 90S - CRM Standalone Base Applications.

You should also review the UDCs for other JD Edwards EnterpriseOne systems that the organization uses. Examples of system codes that are commonly used in conjunction with the JD Edwards EnterpriseOne CRM Sales Force Automation system include:

- 01 - Address Book.
- 34A - Advanced Planning & Scheduling.
- 41 - Inventory Management.
- 42 - Sales Management.
- 42B - Sales Order Entry.
- 42S - Customer Self Service.

Note: If you need to create custom UDCs for CRM, you should use system code 90M, CRM Custom.

See Also:

- *JD Edwards EnterpriseOne Tools Foundation Guide.*

3.2.2 Forms Used to Set Up UDCs for CRM Sales Applications

Form Name	FormID	Navigation	Usage
Work With User Defined Codes	W0004AA	System Administration Tools (GH9011), User Defined Codes	Review and set up UDCs for CRM Sales applications.

3.2.3 Setting Up UDCs for CRM Sales Applications

Access the Work With User Defined Codes form.

To set up UDCs for CRM Sales applications:

1. Locate the UDC you want to review by completing the Product Code and User Defined Code fields.
2. To search for a list of UDC tables in a specific product code, leave the User Defined Code field blank, and click Search.

You can search on all of the CRM product codes to verify that all of the necessary values have been set up. Examples of CRM product codes include 90CB, 90CA, and 90CE.

3. Review the existing values.

If necessary, add additional values to the table to support organizational requirements.

3.3 Setting Up Territories and Industry Groupings

This section provides an overview of sales territories and industry groups, and discusses how to:

- Create sales territories.
- Add address information to a sales territory.
- Set processing options for the Territory Application program (P90CA140).
- Set up industry groupings.
- Set processing options for the Industry Grouping Application program (P90CA12A).

3.3.1 Understanding Sales Territories and Industry Groupings

Before you can align the sales force, you must enter the information that the system needs in order to automatically assign sales team members to accounts. First you must set up sales territories.

You enter territories to separate the sales force into geographic regions. When you set up territories, you assign country, state, city, and/or postal code information to each territory.

You cannot assign the same country, state, city, or postal code to multiple territories. Therefore, you enter the most specific information for each territory, for example, City, leaving the less specific fields blank.

For example, your territories for California might include:

- Los Angeles
- San Francisco and Oakland
- All Other California

Using this example, you would set up three territories for California, entering geographic information as follows:

- Los Angeles
Enter "Los Angeles" in the City field. Leave the State field blank.
- San Francisco and Oakland
Enter "San Francisco" and "Oakland" in the City field. Leave the State field blank.
- All Other California
Enter CA in the State field.

When the system determines which territory a California-based customer belongs to, it will first use the customer's postal code, and search through territories that have specific postal codes listed. If there is no match, which there would not be in this

example, the system then searches for a territory based on the customer's city. If the customer's city is Los Angeles, the customer would be assigned to the Los Angeles territory. However, if the customer's city was, for example, Sacramento, the system would not find a match for city, and would then continue searching, using the customer's state. The system would then assign the Sacramento customer to the All Other California territory.

To add additional countries to the system, you add new codes in UDC 00/CN. To enter additional states into the system, you add new codes to UDC 00/S. To add new cities or postal codes to the system, you use the Postal Code Transaction program (P01117). You must enter this information into the system before you can assign it to a territory.

You can set up parent and child territories. For example, you might have a large sales force that covers Europe. This sales force might be split into smaller sub-territories. Therefore, you might set up the parent territory as *Europe*, and create child territories such as:

- Germany
- France
- Spain
- Italy

When you enter customer records, the system uses the address information that you enter for each territory, along with the address you enter for the customer, to determine which territory the customer belongs to.

After you set up territories, you set up industry codes and industry groupings. First, you must verify that all industry codes in which your customers do business are in UDC 01/SC. Then, you create industry groupings. After you create industry groupings, you associate industry codes from UDC 01/SC to each grouping. You cannot add an industry code to more than one industry grouping.

This information is used to determine what industry grouping a customer is associated with, which is then used to determine which sales team members are assigned to the account. Additionally, you can set up parent and child industry groupings. An organization's sales force might be very specialized by product or service area. Therefore, the organization might choose to create specialized industry groupings.

For example, an organization specializing in selling widgets and gadgets to the automotive and medical industries might create these parent industry groupings:

- Automotive
- Medical

The organization can then create child industry groupings. Examples of child industry groupings that might be created under the Automotive parent industry grouping include:

- Automotive Widgets
- Automotive Gadgets

After you set up territories, industry codes, and industry groupings, you can then associated sales team members with each territory and industry grouping. The system uses this information to automatically assign sales team members to accounts based on their industry groupings, geographic proximity to the address that is associated with the account, and effective dates.

Additionally, you can click the Expand All and Collapse All options on the Search for Territories and the Search for Industry Groupings forms to review the hierarchical structure of territories and industry groupings.

See Also:

- [Managing the Sales Force.](#)
- "Setting Up the JD Edwards EnterpriseOne Address Book System", in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.
- "Setting Up Postal Codes" , in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*

3.3.2 Forms Used to Set Up Sales Territories and Industry Groupings

Form Name	FormID	Navigation	Usage
Search for Territories	W90CA140K	Sales Force Automation Setup (G90CA03), Territory	Review existing territories or access the Add Territory form.
Add Territory	W90CA140H	Click Add on the Search for Territories form.	Set up territories.
Territory - Manage {Territory Name}	W90CA140A	Select the territory on the Search for Territories form, and then click Select.	Access forms to add address information to a territory.
Search for Industry Grouping	W90CA12AB	Sales Force Automation Setup (G90CA03), Industry Grouping	Review existing industry groupings or access the Add Industry Grouping form.
Add Industry Grouping	W90CA12AF	Click Add on the Search for Industry Grouping form.	Set up industry groupings.

3.3.3 Creating Sales Territories

Access the Add Territory form.

Parent Territory

Enter the name of the parent territory under which this new territory belongs. You must create the parent territory before you can enter it.

3.3.4 Adding Address Information to a Sales Territory

Access the Territory - Manage {Territory Name} Form.

Figure 3–1 Territory - Manage {Territory Name} form

	Description	Country
<input type="checkbox"/>	Austria	AT
<input type="checkbox"/>	Belgium	BE
<input type="checkbox"/>	Denmark	DK

To add address information to a territory:

1. Click the Country link, and then click the Assign Country button.
2. Search for and select the countries that you want to attach to the territory, and then click Select.
3. Click the State link and then click the Assign State button.
4. Search for and select the states that you want to attach to the territory, and then click Select.
5. Click the City link and then click the Assign City button.
6. Search for and select the cities that you want to attach to the territory, and then click Select.
7. Click the Postal Code link and then click the Assign Postal Code button.
8. Search for and select the postal codes that you want to attach to the territory, and then click Select.

3.3.5 Setting Processing Options for the Territory Application Program (P90CA140)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any

values, including the version number, version title, prompting options, security, and processing options.

3.3.5.1 Default

These processing options specify the default values that the Territory Application program uses.

1. Sales Team Search Type

Enter the Address Book search type that was used to create sales teams or sales groups. The default value is E.

You can only assign address book records with search types E, PA, and SG the value that you specify in this processing option to a sales territory.

If you want to assign sales teams to sales territories, you must set them up using the search type value that you enter in this processing option.

3.3.5.2 Version

These processing options specify the default versions that the Territory Application program uses.

1. Opportunity

Enter the version of the Manage Opportunities program (P90CB020) that is used when viewing the opportunities associated with a sales territory.

3.3.6 Setting Up Industry Groupings

Access the Add Industry Grouping form.

1. On the Add Industry Grouping form, complete the Name field, and if this industry grouping is a child grouping, complete the Parent Industry Group field.
You must create the parent industry grouping before you can enter it here.
2. Click Save and Continue.
3. On the Industry Grouping–Manage {Industry Grouping Name} form, click the Industry link, and then click Assign Industry.
4. On the Assign Industry form, select each industry code that you want to assign to the industry grouping, and then click Select.
5. On the Industry Grouping–Manage {Industry Grouping Name} form, click Close to exit the program.

3.3.7 Setting Processing Options for the Industry Grouping Application Program (P90CA12A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

3.3.7.1 Default

These processing options specify the default values that the Industry Grouping Application program uses.

1. Sales Team Search Type

Enter the Address Book search type that was used to create sales teams or sales groups.

You can only assign address book records with search types E, PA, and SG to an industry grouping.

If you want to assign sales teams to industry groupings, you must set them up using the search type value that you enter in this processing option.

3.3.7.2 Version

These processing options specify the default versions that the Industry Grouping Application program uses.

1. Opportunity

Enter the version of the Manage Opportunities program (P90CB020) that is used when viewing the opportunities associated with an industry grouping.

3.4 Setting Up Sales Methodologies

This section provides an overview of sales methodologies, lists prerequisites, and discusses how to set up sales methodologies.

3.4.1 Understanding Sales Methodologies

You use sales methodologies to define the typical steps that a sales representative might complete to close a particular type of sale. Sales methodologies define the milestones associated with a type of sale, and they assist sales representatives in completing all of the predefined tasks and activities that have proven to help with the specified type of sale.

Sales methodologies include sales cycle steps, which are also used to calculate the amount of potential revenue that is associated with each active opportunity.

You enter sales methodologies using the Sales Methodology - Entry Point program (P90CB050). Sales methodology information is stored in these tables:

- F90CB050
- F90CB05A
- F90CB05B

3.4.1.1 Sales Methodology Setup

When you set up a sales methodology, you define sales cycle steps for the methodology. A typical sales methodology might include these sales cycle steps:

- Initial Call

- Proposal
- Demonstration
- Quote
- Won Business
- Lost Business

For each step, you assign a sequence and a probability of closing the sale. The sequence is used to specify the order in which the steps should be completed. The probability of closing is used to calculate the amount of business the organization might expect to receive at that step in the sales cycle.

Typically, the first steps in a sales cycle have a lower probability of closing than the later steps. For example, the organization might find that it is able to win business during the initial call step 5 times out of every 100 calls. Therefore, you might assign a 5 percent probability to the Initial Call sales cycle step. Similarly, you might find that sales representatives are able to close eight out of 10 deals once the transaction reaches the Quote sales cycle step. Therefore, you might assign a probability of 80 percent to the Quote sales cycle step.

The percentages that you assign to these sales cycle steps are used to calculate pipeline amounts. The pipeline is used to determine how much potential business is currently in process. You can exclude sales cycle steps from the pipeline calculation if you choose. The system multiplies the potential revenue amount that is associated with the opportunity by the probability that is associated with the active sales cycle step. This amount is then entered into the pipeline in the bracket associated with the probability percentage.

For example, if an opportunity has a potential revenue amount of 100,000 USD, and the active sales cycle step on the opportunity is Quote, which has a probability of 30 percent, the system performs these actions:

- The system calculates the pipeline amount as $100,000 \text{ USD} * 30 \text{ percent} = 30,000 \text{ USD}$.
- The system enters 30,000 USD into the pipeline in the 30-39 percent bracket.

Each sales methodology should include:

- At least one sales cycle step with a probability greater than zero.
- One sales cycle step with a probability of 100.

The probability must be 100 to convert a sales opportunity to a sales order.

- One sales cycle step with a probability of zero.

When you lose a sales opportunity, you assign the sales cycle step with zero probability to that opportunity. This removes from the pipeline the potential revenue that is associated with that opportunity.

You can also associate an action plan with each sales cycle step in a methodology. An action plan is a list of predefined tasks and activities that a sales representative should complete when they are in a particular step of the sales cycle. For example, the Proposal step might be associated with an action plan that includes these activities:

- Input the data that you received during the initial call and generate a proposal document.
- Send the proposal document, along with a thank you note, to the opportunity contact.

- One week from the date you mail the proposal, place a follow-up call to the opportunity contact.

In addition to sales cycle steps and action plans, you can also associate sales drivers with a sales methodology. Sales drivers are the forces that play the greatest part in a potential customer's decisions to select your business. When you add a sales driver to a methodology, you can define the importance of that sales driver.

For example, you might find that the most important sales driver in a particular sales methodology is a client's budget. Therefore, you can set up a sales driver code, and assign it a high level of importance. You set up sales driver codes in UDC 90CB/CA. You set up sales driver importance codes in UDC 90CB/IM. You must set up these codes before you can assign sales drivers and importance codes to a sales methodology.

3.4.1.2 Default Sales Methodology

When you set up sales methodologies, you must define one as the default methodology. This default methodology might be a generic methodology that can be used for any type of sale. You can have only one active default sales methodology at any given time. The default methodology must have at least one active sales cycle step with a probability greater than zero.

If you select the Default option when creating a sales methodology, and there is already an active default methodology, the system produces this message when you attempt to save the sales methodology record:

A default Sales Methodology, {Methodology Name}, already exists. Click Yes to make the current sales methodology default or No to preserve the existing default sales methodology.

If you click Yes, the system deselects the Default option on the existing default methodology, and the current record becomes the new default methodology. If you click No, the system deselects the Default option on the current record, and the existing default methodology remains the default.

3.4.1.3 Sales Methodology Usage

After you have set up sales methodologies, you can attach them to the opportunity records that the sales team generates. Attaching a sales methodology to an opportunity enables the system to accurately calculate the pipeline amount associated with each opportunity. It also assists sales representatives in completing the sales cycle by providing detailed information about what tasks and activities should be completed at each step in the cycle. Lastly, it assists sales representatives by enabling them to assign and view the sales drivers that are most important in winning the potential customer's business.

3.4.2 Prerequisites

Before you complete the tasks in this section:

Verify that sales driver and sales driver importance codes are set up in UDC tables 90CB/CA and 90CB/IM, respectively.

Additionally, if the organization chooses to associate action plans with sales cycle steps, you must define those action plans before you can add them to a sales methodology.

See "Using Foundation Calendar", in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.

"Creating Action Plans" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*

3.4.3 Forms Used to Set Up Sales Methodologies

Form Name	FormID	Navigation	Usage
Search for Sales Methodologies	W90CB050A	Sales Force Automation Setup (G90CA03), Sales Methodology	Access the forms to set up a sales methodology.
Add Sales Methodology	W90CBSMA	Click Add on the Search for Sales Methodologies form.	Define the name of the sales methodology.
Sales Methodology - Manage {Methodology Name}	W90CB050B	Click Save and Continue after you enter the name of the sales methodology on the Add Sales Methodology form.	Set up a sales methodology.

3.4.4 Setting Up Sales Methodologies

Access the Sales Methodology - Manage {Methodology Name} form.

Figure 3–2 Sales Methodology - Manage {Methodology Name} form

Sales Methodology - Sales Methodology - Manage Rock Climbing Sales

Save Changes Undo Changes Close

Description * Rock Climbing Sales

☒ Default ☐ Inactive

Sales Cycle

Find Active Records Find Inactive Records

Records 1 - 6 Customize Grid

Inactive	Step #	Name *	Description	Probability *	Months to Close
<input type="checkbox"/>	0	Quote	Quote	50	
<input type="checkbox"/>	0	Won	Won	100	
<input type="checkbox"/>	1	First Call	Initial Customer Contact	50	
<input type="checkbox"/>	4	Finalize Commitment	Finalize Commitment	75	
<input type="checkbox"/>			Click to enter description		

Default

Select this option to specify that this is the default sales methodology. When you enter a new sales opportunity, the system automatically populates opportunity records with the default sales methodology. If necessary, you can change the methodology. You can have only one active default sales methodology at any time. The default methodology must have at least one sales cycle step with a probability greater than zero.

Inactive

Select this option to specify that the methodology is no longer active. You can reactivate a methodology at any time by deselecting this option.

Inactive

Select this option to specify that a sales cycle step is inactive. You can reactivate the sales cycle step at any time by deselecting this option.

Name

Enter the name of the sales cycle step.

Probability

Enter the numeric probability, in whole numbers, that the sale will eventually close successfully. For example, if there is a 10 percent chance that sales that are currently in the Proposal step will close successfully, enter **10** in the Probability field for the Proposal sales cycle step. Values are **0** to **100**.

The Probability field is used in these ways:

When the sales cycle step is selected in an opportunity record, the value in the Probability field is multiplied by the value in the Potential Amount field on the opportunity. The resulting amount is included in the pipeline. The value in the Probability field is also used to determine in which bracket of the Pipeline tab the result of the previous equation displays. For example, if the Probability is 25 percent, and the value in the Potential Amount field is **1,000,000**, then 250,000 would be added to the pipeline in the 20-29 percent bracket.

Months to Close

Enter the number of months it should take a sales representative to close the sale from the time the specified sales cycle step begins. For example, if it should take 3 months to close a sale from the time that the Proposal sales cycle step begins, enter **3** in this field for the Proposal sales cycle step.

This field is used to populate the Closed Date field on the Opportunity Detail form. The Closed Date is calculated by adding the number of months entered to the date the Cycle Step was selected on the Opportunity Detail form.

Step #

Enter the sequence number associated with the sales cycle step. This field controls the order in which the system displays the sales cycle steps on the Sales Methodology and Opportunity Detail forms.

Pipeline Exclude

Select this option if you do not want any monetary amounts associated with this sales cycle step to be included in the pipeline.

Action Plan

Enter the action plan associated with this sales cycle step.

The activities of the selected action plan will be assigned when the sales representative selects this sales cycle step on the opportunity record.

Category

Enter the category code that best defines a customer or opportunities main concerns or motivators associated with a sale. Values for this field are stored in UDC 90CB/CA.

Short Description

Enter a short, descriptive title that represents the customer or opportunities concern or motivator. For example, you might enter **Budget issues are main concern** in this field.

Long Description

Click the link to access a free-form text box. You can enter additional information about the concern or motivator in this text box.

Importance

Enter the importance of the sales driver, using a numeric value. This value assists sales representatives in identifying how important the information captured in the sale driver is to the client and their business.

3.5 Setting Up Qualification Scripts

This section provides an overview of qualification scripts, and discusses how to:

- Create qualifications.
- Create questions and answers.

3.5.1 Understanding Qualification

It is important that the sales team carefully qualify leads and opportunities to avoid wasting time and resources. To help with the qualification process, you can set up qualification scripts that sales representatives can use to determine whether a lead or opportunity is qualified.

The sales representative can associate a qualification script with the lead or opportunity they are working with, ask the questions that are associated with that script, and enter the answers into the system. The system automatically scores the lead or opportunity based on the responses. If the score is greater than the qualification goal for the associated script, the lead or opportunity is qualified. If the score is less than the qualification goal, the lead or opportunity should not be pursued.

These programs are used to create qualification scripts:

- CRM - Manage Qualification Scripts program (P90CB040).
- CRM - Qualification Script Detail-Add (P90CB043).
- Qualifications - Qualification Answers Search & Select program (P90CB045).
- Qualification Object Tab program (P90CB044).

These tables are used to store qualification information:

- F90CB040
- F90CB041
- F90CB042
- F90CB043

Using the qualification programs, you set up qualifications, the questions that are associated with each qualification, and the answers that are associated with each question. You can assign values to the questions in a script. You can also assign values to the answers to those questions. The system uses these values to calculate the lead or opportunity's qualification score.

3.5.1.1 Qualifications

To begin creating a script, you must first create qualifications. You use qualifications to classify the questions that you create later in the process. You can group questions according to any guidelines you choose. For example, you might choose to group questions according to product lines. Therefore, you must create a qualification for each product line. You can then create questions for each of the qualifications. When you enter a lead or opportunity, you can choose a qualification. Only the questions associated with that qualification appear for that lead or opportunity.

For example, if an organization sells mountain bikes, road bikes, and bike accessories, you might set up these qualifications:

- Mountain Bike Sales
- Road Bike Sales
- Bike Accessory Sales

When you create a qualification, you enter lead and opportunity thresholds. Thresholds represent the scores that the lead or opportunity must meet or exceed to be qualified.

You would then create questions for each of the classifications, along with their associated answers. When a sales representative tries to sell mountain bikes, he or she can use the Mountain Bike Sales qualification to determine whether the lead or opportunity is qualified. The Mountain Bike Sales qualification would include all of the mountain bike-related questions and answers that were entered into the system.

Note: It is not mandatory that the lead or opportunity meet the threshold value. The score will not prevent a lead from being converted to a customer, or an opportunity from becoming a sales order. The numbers serve only as a guide.

Additionally, once you associated a qualification with a lead or an opportunity, the qualification becomes read-only, and cannot be updated. Therefore, if you find that you must modify a script after it has been associated with a lead or opportunity, you can copy the existing script, make any necessary modifications to the newly-created script, and then mark the existing script as inactive. The inactive script will no longer be available to be attached to leads or opportunities.

3.5.1.2 Qualification Questions

After you create qualifications, you create questions for the qualification. The questions you create appear when a sales representative selects the qualification when working with a lead or opportunity.

When you add questions to a qualification, you are required to enter a sequence number. Sequence numbers determine the order in which the questions appear. If you enter **1**, the question appears first, and if you enter **2**, it appears second, and so on.

You are also required to enter one of these question types for each question:

- Leading
- Rhetorical
- Open ended

The question type does not affect how the question appears. It is informational only, and might help users to understand how the question should be posed. After you select a question type, you enter the question, which is the text that appears to the sales representative.

You also enter weighting points for each question. Weighting points are used to assign a value to each question. For example, among five questions you might have two key questions, one fairly important question, and two questions of minimal importance. Therefore, you might assign these weighting points to each question:

Question	Importance	Weighting Points
Question 1	High	15
Question 2	High	15
Question 3	Medium	10
Question 4	Low	5
Question 5	Low	5

The sum of the weighting points for all questions that are associated with a qualification represent 100 percent, and is used as the basis for calculating the respondents' scores. In this example, the total weighting points for the script is 50. When the respondent answers the questions, the system calculates a score for each question, and totals those scores when the script is complete. The system then divides the respondent's total points by the total number of points in the script to determine the script score. For example, if the respondent received 38 points, the system performs this calculation to determine the respondent's script score: $38 \div 50 = .76$. Therefore, the respondent's score is 76 percent, or 76. If this score is greater than or equal to the lead or opportunity threshold, the respondent is considered qualified.

3.5.1.3 Answers

After you create questions, you must enter possible answers for each question. When attempting to qualify a lead or opportunity, the sales representatives can view the possible answers for each question that they ask. You can enter a sequence number for each answer, which controls the order in which the answers appear.

You can enter weighting percentages for each answer that you create. The weighting percentage is the percentage of the weighting points that are added to the qualification score when the answer is chosen. The system multiplies the answer's weighting percentage by the weighting points associated with the question to determine the number of points towards the final score. The system then adds up the totals for all of the questions to determine whether the lead or opportunity meets the qualification thresholds.

For example, if a question has 100 weighting points, and you assign a weighting percentage of 100 to an answer, if that answer is selected, 100 points are counted towards the final score. If the weighting percentage associated with the chosen answer is 20 percent, then 20 points are added to the qualification score.

The weighting percentages associated with the answers to a single question do not have to equal 100. Instead, they are used to calculate the total number of qualification points that are earned when the answer is selected.

For example, you might ask the question, "Are you in the market to buy mountain bikes right now?" This question has 50 weighting points associated with it. This example illustrates how you might assign weighting percentages to the possible answers:

Answer	Weighting Percentage	Calculation	Points Toward Final Score
Yes	100	$50 * 1.00 = 50$	50 points
Maybe	50	$50 * .50 = 25$	25 points
No	10	$50 * .10 = 5$	5 points

3.5.1.4 Qualification Script Example

A sales representative is attempting to qualify a lead. The representative uses a qualification script that has a lead threshold of 60. Therefore, in order for this lead to be considered qualified, the qualification score must be 60 or higher. The script has these three questions:

Question	Weighting Points	Answers - Weighting Percentage
Question 1	20 Points	Answer A - 100 Answer B - 75 Answer C - 25
Question 2	50 Points	Answer A - 100 Answer B - 50 Answer C - 20
Question 3	100 Points	Answer A - 100 Answer B - 80 Answer C - 0
Total	170 Points	170 points possible

When the sales representative runs through the script with the lead, these answers are given:

Question	Answer	Calculation	Points Toward Score
Question 1 (20 points)	Answer B (75 percent)	$20 \times .75 = 15$	15 points
Question 2 (50 points)	Answer C (20 percent)	$50 \times .20 = 10$	10 points
Question 3 (100 points)	Answer B (80 percent)	$100 \times .80 = 80$	80 points

This gives the lead a total of 105 weighting points out of the possible 170 weighting points. 105 points is 62 percent of 170 points, giving the lead a qualification score of 62. Because this number is greater than the lead threshold percentage of 60, the lead is considered qualified.

See Also:

- [Maintaining and Updating Leads.](#)
- [Managing and Maintaining Opportunities.](#)

3.5.2 Forms Used to Set Up Script Information

Form Name	FormID	Navigation	Usage
Search for Qualifications	W90CB040B	Sales Force Automation Setup (G90CA03), Qualifications	Select existing qualifications or access the forms to create new qualifications.
Add Qualification	W90CB043B	Click Add on the Search for Qualifications form.	Create a qualification.

Form Name	FormID	Navigation	Usage
Manage {Qualification Name}	W90CB040A	Select a qualification on the Search for Qualifications form or click Save and Continue on the Add Qualification form.	Create questions and answers for a qualification.

3.5.3 Creating Qualifications

Access the Add Qualification form.

After you have created the qualification, you can click Save and Continue to enter questions and answers for the qualification, or you can click Save and Close to exit the program. If you exit the program, you can access the qualification at a later time to enter questions and answers. If you want to enter multiple qualifications at once, you can click Save and Add New.

Lead Threshold%

Enter the percentage score the lead should meet or exceed before being converted. Value entered must be between 0 and 100. This value is a guideline only, and does not deter a lead from being converted to an opportunity.

Opportunity Threshold%

Enter the percentage score the opportunity should meet or exceed before being pursued. This value is used as a guideline only, and does not deter an opportunity from being converted to a quote or sales order. Value entered must be between 0 and 100.

Inactive

Select this option to specify that the script is no longer active. If this option is selected, the script will not appear when you search for active scripts. You can reactivate a script at any time by deselecting this option.

3.5.4 Creating Questions and Answers

Access the Manage {Qualification Name} form.

Figure 3–3 *Manage {Qualification Name} form (1 of 2)*

Qualification - Manage Audio Equipment Script

Qualification

Detail

Save Changes Undo Changes Copy Close

Name: * Audio Equipment Script

Lead Threshold %: 50.00

Opportunity Threshold %: 35.00 ☐ Inactive

Qualification Questions

Records 1 - 2

Question Seq No.	Question *	Weighting Points	Question *
1	OPN	50	Do you shop the internet for audio equipment?

Delete

Figure 3–4 *Manage {Qualification Name} form (2 of 2)*

Qualification Answers

Records 1 - 2

Answer Seq No.	Weighting %	Answer *
1	100	yes

Delete

Save Changes Undo Changes Copy Close

After you create a question, you can enter answers for that question. To associate answers with the correct question, you must select the question for which you want to enter answers before you enter the answers. You can enter all of the questions first, and then enter answers for each question, or you can enter answers for each question immediately after you enter the question. You can enter questions, save information, exit the script, and return to the script at a later time to enter answers.

Question Seq No

Enter the numeric value that represents the order in which the question appears in the script. The lower the number, the earlier the question appears. For example, a question with a sequence number of 1 appears before a question with a sequence number of 4.

Question Type

Enter the type of question that you are entering. Values are stored in UDC 90CB/QT, and include:

LEAD: Leading

OPN: Open Ended

RETR: Rhetorical

Weighting Points

Enter the total number of points that can be counted towards the qualification score for a lead or opportunity. The system multiplies the weighting points by the weighting percentage that is assigned to the associated answer to determine the actual number of points that are added to the qualification score.

For example, you might assign 100 weighting points to a question. If the lead or opportunity selects an answer with a weighting percentage of 50, the system adds 50 points ($.50 \times 100$ points) to the qualification score.

Answer Seq

Enter the numeric value that represents the order in which the answers for each question appear. Answers with lower numbers appear at the top of the grid.

Weighting%

Enter the percentage of weighting points that a lead or opportunity gets when they select this answer. The percentage value that you enter in this field is multiplied by the weighting points of the associated question to determine the number of points that are added to the lead or opportunity's qualification score.

For example, if the lead or opportunity selects an answer with a weighting percentage of 75, and the associated question had 100 weighting points, the system adds 75 points ($.75 \times 100$ points) to the qualification score.

Managing the Sales Force

This chapter contains the following topics:

- [Section 4.1, "Understanding the Sales Force"](#)
- [Section 4.2, "Adding Sales Team Members to Territories and Industry Groupings"](#)
- [Section 4.3, "Assigning Sales Team Members to Customers"](#)
- [Section 4.4, "Reviewing Sales Team Information"](#)

4.1 Understanding the Sales Force

Many organizations sell products and services to different industries in diverse geographic locations. These geographic locations are typically referred to as territories. To better serve customers, organizations typically specify which territories and industries each sales team member supports.

By defining territory and industry information for the sales force, you can allow the system to automatically assign sales team members to customers based on territory and industry information. This process is known as aligning the sales force.

When you align the sales force, the system automatically assigns sales team members to all of the customers in the system, based on territory and industry groupings. You can realign the sales force as often as the business demands.

You can also specify whether a customer should be excluded from the automatic alignment process. For example, the organization might have a customer that works with a specific sales team and will not work with any other sales team. In this instance, you can exclude that customer from the automated alignment process and manually assign the appropriate sales team members to the customer.

4.2 Adding Sales Team Members to Territories and Industry Groupings

This section provides an overview of sales team territories and industry groupings, list prerequisites, and discusses how to:

- Add sales team members to a territory.
- Add sales team members to an industry grouping.

4.2.1 Understanding Sales Teams by Territory and Industry Groupings

Before you can align the sales force, you must define which territories and industries each sales team member supports. You can add individual employees and partners, along with sales groups, to a territory and to an industry grouping. You can then

specify the dates during which each sales team member is effective, or active, on those territories and industry groupings.

4.2.1.1 Territories

You use the Territory Application program (P90CA140) to add sales team members to a territory. When you assign a sales team member to a territory, the system creates a record in the F90CA14A table.

You can add employees, partners, sales team members, or sales groups to a territory. You can add a sales team member to multiple territories. You can also enter effective dates for each member that you attach to a territory. These dates specify when the sales team member is actively supporting the specified territory. If you do not enter effective dates, the system uses the system date as the beginning effective date, and 12/31/2015 as the default expiration date.

Note: If you want to assign sales groups to a territory, you must first create sales groups. You can set up sales groups using search types of E, C, and SG. We recommend that you select one search type to use for all sales groups that are used by the CRM Sales Force Automation system. Then you must specify that search type in the processing options for the Territory Application program (P90CA140).

For example, if a sales team member has just begun employment with the organization, he might be responsible for supporting a small territory, Territory A, during his first month of employment. After he successfully completes the month, you might also assign him to Territory B and C.

This example illustrates how you might add the employee to territories:

Territory	Beginning Effective Date	Expiration Date
Territory A	01/01/2005	12/31/2015
Territory B	02/01/2005	12/31/2015
Territory C	02/01/2005	12/31/2015

If the employee moved, or due to resource, territory, or industry group reorganization, was no longer supporting on of the territories, you can enter an expiration date on the territory. After the expiration date, the employee would no longer be considered an active sales team member in that territory.

4.2.1.2 Industry Groupings

You use the Industry Grouping Application program (P90CA12A) to add sales team members to an industry group. When you assign a sales team member to an industry group, the system creates a record in the F90CA12B table.

You can add employees, partners, and sales groups to one or more industry groupings. You can also enter effective dates for each sales team member that you attach to an industry grouping. These dates are used to specify when the sales team member is actively supporting the specified industry grouping. If you do not enter effective dates, the system uses the system date as the beginning effective date, and 12/31/2015 as the default expiration date.

For example, a sales team member might initially be responsible for supporting only Industry 1 during his first month of employment. After he successfully completes the

first month of employment, he is then responsible for supporting Industry 1 and Industry 2.

This example illustrates how you might add the sales team member to industry groupings:

Industry Grouping	Beginning Effective Date	Expiration Date
Industry 1	01/01/2005	12/31/2015
Industry 2	02/01/2005	12/31/2015

4.2.2 Prerequisites

Before you complete the tasks in this section:

- Enter sales team members into the system.
Sales team members can be employees, partners, or sales groups.
- Create sales territories.
- Set up industry groupings.

See Also:

- [Setting Up Territories and Industry Groupings](#).
- "Managing Employees for CRM" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.
- "Managing Partners" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.
- "Setting Up Order Processing Information", in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.
- "Setting Up Commission Information", in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

4.2.3 Forms Used to Add Sales Team Members to Territories and Industry Groupings

Form Name	FormID	Navigation	Usage
Search for Territories	W90CA140K	Sales Force Automation Setup (G90CA03), Territory	Select a territory.
Territory - Manage {Territory Name}	W90CA140A	Select the territory on the Search for Territories form.	Select the territory to which you want to add sales team members.
Search for Industry Grouping	W90CA12AA	Sales Force Automation Setup (G90CA03), Industry Grouping	Select an industry grouping.
Industry Grouping - Manage {Industry Grouping Name}	W90CA12AA	Select the industry grouping on the Search for Industry Groupings form.	Add sales team members to an industry grouping.

4.2.4 Adding Sales Team Members to a Territory

Access the Territory - Manage {Territory Name} form. Select the Sales tab. Click the Sales Team link.

To add sales team members to a territory:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the territory, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area on the Sales tab of the Territory - Manage {Territory Name} form.

3. To remove a member, you can select that member and then click the Remove button.

We suggest that you only remove members if you have accidentally added them to the territory. If they are no longer active on the territory, you can enter an expiration date for the employee, partner, or sales group.

4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Detail Power Edit form, enter the dates during which the sales team member is actively supporting the territory.

4.2.5 Adding Sales Team Members to an Industry Grouping

Access the Industry Grouping- Manage {Industry Grouping Name} form. Select the Sales tab. Click the Sales Team link.

To add sales team members to an industry grouping:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the industry grouping, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area on the Sales tab of the Industry Grouping - Manage {Industry Grouping Name} form.

3. To remove a member, you can select that member and then click the Remove button.

We suggest that you only remove members if you have accidentally added them to the territory. If they are no longer active on the industry grouping, you can enter an expiration date for the employee, partner, or sales group.

4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Detail Power Edit form, enter the dates during which the sales team member is actively supporting the industry grouping.

4.3 Assigning Sales Team Members to Customers

This section provides an overview of assigning sales teams to customer records and discusses how to:

- Entering customer overrides for sales alignment.

- Run the Sales Team Alignment TC program (R90CA18A).
- Manually assign sales team members to customers.
- Manually assign sales team members to opportunities.

4.3.1 Understanding Sales Force Alignment

You can set up the system to automatically assign sales team members to customers based on their territory and industry groupings. Allowing the system to automatically align the sales force can assist the organization in assigning the sales representatives in the closest geographic proximity, and with the most industry knowledge, to each account, which can improve the likelihood of a successful sales transaction.

The alignment process is based on territory and industry groupings. Therefore, after you set up sales team members in the system, you must assign each sales team member to territories and industry groupings. You use effective dates to determine when a sales team member is active in a specific territory or industry grouping.

After you enter territory and industry grouping information for the sales force, when you enter new customer records, or change industry, primary address, or territory information on existing customer records, the system automatically assigns all active sales team members with the appropriate industry and territory classifications to those records. Alternatively, you can update the sales teams associated with customer records using a batch process.

After the sales team has been assigned to a customer, when you create opportunities for that customer, the system assigns the active sales team members from the sold to, ship to, or both customer's sales team to the opportunities that are created for that customer based on the CRM System Constants. When you convert the opportunity to a quote or a sales order, the system copies all active sales team members, whose Apply Commission option is selected, from the opportunity record to the quote or sales order.

Note: Once an opportunity, quote, or sales order has sales team members assigned to it, the alignment process does not change that sales team, even if the sales team of the related customer is changed. To add or remove members from the sales team of an opportunity, quote, or sales order, you must manually change the sales team.

4.3.1.1 Territory Assignment

When you enter a customer record, you specify the address for that customer. You can enter multiple addresses for each customer. The system compares the customer's primary address to the address information associated with each sales territory. The system then assigns the appropriate territory to customer record. If necessary, you can manually override the territory that the system assigns using customer override options.

When assigning a territory to a customer, the system first tries to match the postal code from the customer address, including the four-digit extension, to the postal codes assigned to a territory. If the customer's postal code is not associated with any of the territories, the system then tries to match the first five digits of the customer's postal code to the postal codes assigned to a territory. If no match is found, the system then tries to match the city and state from the customer address to the city and state assigned to a territory. If the customer's city and state combination is not associated with any of the territories, the system then tries to match the city from the customer address to the city associated with a territory. If no match is found, the system then tries to match the customer's state to the state associated with a territory. Lastly, if the

customer's state does not exist on any of the territories, the system tries to match the country from the customer's address to the country assigned to a territory. If no matches are found, the system does not assign a territory to the customer record.

4.3.1.2 Industry Grouping Specification

When you enter customers, you must specify the industry classification associated with that customer. The system uses this information to determine which industry grouping the customer belongs to, and to determine which sales team members are actively supporting that grouping at the time the record is added or changed.

You can enter only one industry for each customer record. If the industry is not associated with an industry grouping, the system does not assign an industry grouping to the customer record.

4.3.1.3 The Automatic Alignment Process

After you set up sales team members, territories, and industry groupings, you can then align the sales force. The alignment process happens automatically each time a customer record is added or changed. The system assigns sales team members to each customer record when the record is added or changed, based on the territory and industry grouping. After the sales team is assigned to a customer, the active members of that sales team are copied to opportunity records that are created for that customer. However, once a sales team has been added to an opportunity, the sales force alignment process does not change the opportunity's sales team. The alignment process affects only customer sales team records.

When sales team members are assigned to a customer, the system creates a record in the F42140 table.

The automatic alignment process consists of these steps:

1. You enter a new customer record, or change the industry, territory, or primary address of an existing customer record.
2. If the customer's existing sales team includes members who are no longer active in both the territory and the industry grouping, the system adds an expiration date to those members, which removes them from the active sales team.
3. If the customer's existing sales team includes members whose beginning effective date is greater than the system date, the system does not remove that member from the sales team or change the effective dates for that member.
4. The system retrieves the customer's primary address information to determine which territory to assign to the record.
5. The system identifies all sales team members who are active in the specified territory.

A sales team member is considered active if their beginning effective date is on or before the system date, and their expiration date is on or after the system date.

6. The system retrieves the customer's industry grouping code.
7. The system identifies all sales team members who are active for the specified industry grouping.

A sales team member is considered active if their beginning effective date is on or before the system date, and their expiration date is on or after the system date.

8. The system adds all of the sales team members who are active in *both* the specified territory *and* the specified industry grouping to the customer's sales team.

The system assigns the system date as the begin date for all newly added members of the sales team.

4.3.1.4 The Batch Alignment Process

At times, the organization might find it necessary to use a batch process to realign the sales force. For example, if members of the sales force leave the organization, you can use a batch process to update records rather than manually updating each customer sales team on which the employees worked. Similarly, if you add new territories or change existing territories, you can use a batch process to update records.

To process batch alignment, you run the Sales Team Alignment TC program (R90CA18A, version XJDE0007). This program performs all of the steps that the automated alignment process performs, with one exception. You do not need to physically change the customer record in order to update the sales team. When you run the Sales Team Alignment TC program, the system determines whether any changes have been made to territories or industry groupings since the program was run last. If a territory or industry grouping changed, the system updates all customer records associated with those territories or industry groupings. The system also looks at customer records whose Industry Grouping or Territory fields are blank to determine if the changes to the industry groupings or territories might affect those customers.

4.3.1.5 Remove a Member from a Sales Team

If an employee leaves the organization, you can remove them from the sales team by entering an ending effective date on the sales team member record. By entering an ending effective date, as opposed to deleting the member from the sales team, you can keep an audit trail of all of the sales team members that worked on an account at any given time.

We recommend that you use the Delete option only if you accidentally add an employee to a sales team.

4.3.1.6 Exclude Accounts from Automated Alignment

In certain instances, you might decide that you do not want the system to automatically assign the sales team to a customer. Using customer overrides, you can exclude an account from the sales alignment process.

For example, if a valuable customer has decided that they will work only with certain sales members, you can set up their account so that the system does not assign sales team members based on territory and industry grouping. When the Sales Team Override flag is selected, all modifications to the sales team must be done manually.

When you specify that a customer should not be included in the alignment process, the system does not make any changes to the sales team members associated with that record, even if the territories or industry groups associated with the customer change.

4.3.1.7 Manually Assign Sales Team Members

At times, the organization might want to manually assign sales team members to customers and opportunities rather than using the automated alignment process.

For example, several customers might have developed a strong relationship with a particular sales member or sales team. To satisfy these customers you might decide to assign these sales team members to those accounts, even though the sales team members do not actively support the territories or industry groupings associated with their accounts.

Similarly, you might want to add a product or industry expert to a particular customer to help win a sale, even though that person might not actively support the territory in which the customer resides. In this situation, you can manually add the expert to the opportunity sales team. You can also exclude the accounts from the automated alignment process to ensure that the sales team does not change each time the account is updated or each time the Sales Team Alignment TC program is processed.

4.3.1.8 Sales Team Roles

After you assign sales team members to a customer, you can assign each member of the team a role. Valid role types are stored in UDC H42/RT. Role types are informational codes that specify the job that each member of a sales team should perform. Examples of role types include:

- Account Manager
- Sales Representative
- Sales Support

4.3.2 Forms Used to Assign Sales Team Members to Accounts

Form Name	FormID	Navigation	Usage
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer	Select a customer.
Customer - Manage {Customer Name}	W90CA080A	Select a customer on the Search for Customers form.	Access customer information, enter customer overrides, and manually assign sales team members.
Sales Team Revisions	W90CA08AB	Click a sales team member on the Sales Team section of the Customer - Manage {Customer Name} form.	Assign roles to sales team members.
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Select an opportunity.
Opportunity - Manage {Opportunity Name}	W90CB020A	Select an opportunity on the Search for Opportunities form.	Access opportunity information and manually assign sales team members.

4.3.3 Entering Customer Overrides for Sales Alignment

Access the Customer - Manage {Customer Name} form. Select the Customer tab. Click the Detail link.

Figure 4–1 Customer - Manage {Customer Name} form: Customer tab: Detail link

Customer - Customer - Manage Tony Enriquez and Company, Oracle - J.D. Edwards

Customer **Contact and Partner** Activities Sales Service Attachments

Detail | [Address and Phone](#) | [Emails](#) | [Customer Options](#) | [Service Information](#) | [Profile](#) | [Related Links](#)

Save Changes Undo Changes Close

Customer Number: Company:

Name *: Long Address Number:

Search Type *: Customers Customer Status *:

Tax ID:

Industry Classification:

Details Related Entities Classification

Business Unit: Tonya HB Text

Address Type: Bill To and Ship To Address

Stock Ticker: Stock Exchange:

Tier: Account Open:

Industry Grouping: Informational: No Industry Grp ☐ Sales Team Override

Territory: Informational: No Territory ☐ Territory Override

Annual Revenues: Number Of Employees:

Growth Rate: Year Started:

Sales Team Override

Select this option if you do not want the system to automatically assign sales team members to the customer based on the territory and industry grouping. If you select this option, any changes to the sales team must be done manually.

Territory Override

Select this option if you want to manually override the territory that is assigned to the account. The system determines the territory by comparing the specified customer address to the address information of each sales territory.

If you select this option, the system enables the Territory field, which enables you to enter an override value. The system uses this value when performing sales team alignment.

Territory

Enter the territory in which the customer belongs. You can enter a value in this field only if you select the Territory Override option. If you do not select the Territory Override option, the value in this field is supplied by the system, and the field is disabled.

4.3.4 Running the Sales Team Alignment TC program (R90CA18A)

Sales Force Automation Setup menu (G90CA03), Sales Team Alignment UBE.

4.3.5 Manually Assigning Sales Team Members to Customers

Access the Customer - Manage {Customer Name, Company}. Select the Sales tab. Click the Sales Team link.

To manually assign sales team members to a customer:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the sales team, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area of the Sales tab.

3. To remove a member, you can select that member and then click the Remove button.

We suggest that you only remove members if you have accidentally added them to the sales team. If they are no longer active on the team, you can enter an expiration date for the employee, partner, or sales group.

4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Revisions form, enter the dates during which the sales team member is actively supporting the customer.

4.3.6 Manually Assigning Sales Team Members to Opportunities

Access the Opportunity - Manage {Opportunity Name}. Select the Sales tab. Click the Sales Team link.

To manually assign sales team members to an opportunity:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the sales team, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area of the Sales tab.

3. To remove a member, you can select that member and then click the Remove button.

We suggest that you only remove members if you have accidentally added them to the sales team. If they are no longer active on the team, you can enter an expiration date for the employee, partner, or sales group.

4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Revisions form, enter the dates during which the sales team member is actively supporting the opportunity.

4.4 Reviewing Sales Team Information

This section provides an overview of sales team information and discusses how to:

- Review customers associated with sales team members.

- Review partners associated with sales team members.
- Review opportunities associated with sales team members.

4.4.1 Understanding Sales Team Information

After you enter sales team members into the system, you can assign those members to customer accounts. Hopefully, as the members of the sales team progress, they generate additional customers, opportunities, and partner relationships.

You can review sales information for each sales team member, such as:

- The customers that are associated with sales team members.
- The partners that are associated with sales team members.
- The opportunities that are associated with sales team members.

When you view this information, you have the option of viewing information in two formats:

- Employee only
- Employee and subordinates

The employee only view is the default view. To view information about the employee and their subordinates, click the Expand Hierarchy button on any of the review forms. To return to the employee-only view, click the Collapse Hierarchy button.

For example, Jane Ryan has 12 employees who report to her. When you initially view information for Jane, you see only the customers, partners, or opportunities that she is directly associated with. If you click the Expand Hierarchy button, you can view all of the customers, partners, and opportunities for Jane and the 12 employees who report to her. When you click the Collapse Hierarchy button, you return to viewing only Jane's information.

4.4.1.1 Customer Information

Click the Customer link to review the list of customers with which a sales team member is associated. This information can help you to determine the number of customers each member of the sales team is currently working on. This type of information can assist the organization with resource planning and shifting. For example, you might determine that one sales representative is currently supporting 20 customers, while another representative is supporting only three. Therefore, it might be necessary to reassign sales representatives from one territory or industry to another.

4.4.1.2 Partner Information

You can review a list of partners with whom a sales representative is working.

4.4.1.3 Opportunities

You can review all of the current opportunities with which a sales representative is involved. This information can be useful in assessing the sales representative's work load and sales productivity. When you click the Opportunity link, you can see at a glance this information for all of the active opportunities associated with the sales representative:

- Customer
- Role
- Sales cycle

- Probability
- Close date
- Potential amount

4.4.2 Forms Used to Review Sales Team Information

Form Name	FormID	Navigation	Usage
Search For Employees	W90CA040F	Periodic Sales Force Automation Processing (G90CA02), Employee	Select existing employees for review or revision.
Employee - Manage {Employee Name}	W90CA040A	Select an employee from the Search for Employees form.	Review basic employee information.

4.4.3 Reviewing Customers Associated with Sales Team Members

Access the Employee - Manage {Employee Name} form. Select the Customer and Partner tab. Click the Customer link.

Figure 4–2 Employee - Manage {Employee Name} form: Customer and Partner tab: Customer link

Employee - Employee - Manage Dominique Abbott

Employee Customer and Partner Sales Service Attachments

Customer | Partner

Close

Find Select

Records 1 - 9 Customer Grid

Customer Number	Customer Name	Company	Role	City
4242	Capital System DO NOT MODIFY	00000		Atlanta
4243	Custom Brokers	00000		Manhasset
5074	Eastern Manufacturing Plant	00000		Memphis
445565	445565	00000		CHI
445565	445565	00000		CHI
758292	Joe's Music Shop	00000		Denver
922371	DB	00000		Littleton
998840	998840	00000		
4545963	4545963	00000		

Expand Hierarchy

Close

Select a Query

Specify whether you want to view all, current, expired, or future partners associated with the employee by selecting a value in this field. Selecting a query before you click Find enables you to minimize the number of records that appear on the form. To clear the form and begin a new search, select **Clear**, and then click Find.

4.4.4 Reviewing Partners Associated with Sales Team Members

Access the Employee - Manage {Employee Name} form. Select the Customer and Partner tab. Click the Partner link.

Figure 4–3 Employee - Manage {Employee Name} form: Customer and Partner tab: Partner link

The screenshot shows the 'Employee - Manage Dominique Abbott' form. The 'Customer and Partner' tab is selected, and the 'Partner' link is active. The form displays a 'Find' button and a table with the following columns: Partner Number, Alpha Name, ST, and City. The table is currently empty, with a message 'No records found.' above it. Below the table are buttons for 'Assign Partners' and 'Remove'. A 'Close' button is located at the bottom left of the form.

Partner Number	Alpha Name	ST	City
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4.4.5 Reviewing Opportunities Associated with Sales Team Members

Access the Employee - Manage {Employee Name}. Select the Sales tab. Click the Opportunity link.

Figure 4–4 Employee - Manage {Employee Name} form: Sales tab: Opportunity link

Employee - Employee - Manage Dominique Abbott

Employee Customer and Partner Sales Service Attachments

Opportunity | Pipeline

Close

Find Select

Records 1 - 7 Customize Grid

	Description	Sold To Customer	Sold To Customer Name	Sold To Contact	Ship To Customer	Ship To Customer Name	Ship To Contact
<input checked="" type="radio"/>	unit opp 1	9111	Misty River Bikes & Acco...		9111	Misty River Bikes & Acco...	
<input type="radio"/>	Items - Cop	4242	Capital System DO NOT ...		4242	Capital System DO NOT ...	John Doe
<input type="radio"/>	Items - Cop2	4242	Capital System DO NOT ...		4242	Capital System DO NOT ...	
<input type="radio"/>	NEW	4242	Capital System DO NOT ...		4242	Capital System DO NOT ...	
<input type="radio"/>	Bicycle Campaign	4242	Capital System DO NOT ...		4242	Capital System DO NOT ...	
<input type="radio"/>	baseth	4242	Capital System DO NOT ...		4242	Capital System DO NOT ...	
<input type="radio"/>	test	4242	Capital System DO NOT ...		4242	Capital System DO NOT ...	

Expand Hierarchy

Close

Managing Sales Leads

This chapter contains the following topics:

- [Section 5.1, "Understanding Leads"](#)
- [Section 5.2, "Entering a Lead"](#)
- [Section 5.3, "Maintaining and Updating Leads"](#)
- [Section 5.4, "Converting Leads"](#)

5.1 Understanding Leads

Leads are one of the most important pieces of the sales cycle. Leads represent possible sales opportunities to an organization. You use the CRM - Manage Leads program (P90CB010) to enter leads. The records that you enter are stored in these tables:

- F90CB010
- F90CB030
- F90CB01A
- F90CB042
- F90CB043

When you enter a lead into the system, you must include these required pieces of information:

- First name
- Last name
- Company name

You also specify the contact person's title, phone, and address information, the industry the lead is associated with, the source of the lead, and the date that the lead was established.

You can enter leads individually, or you can import a list of leads into the system by using the Import Leads program (P90CB015). After you enter a lead into the system, you can perform these tasks:

- Enter category codes for a lead.
- Enter additional addresses for a lead.
- Qualify a lead.
- Assign product interests to a lead.

- Assign activities to a lead.
- Link an action plan to a lead.
- Enter attachments to a lead.
- Assign partners to a lead.

Sales representatives use the information associated with the lead to assist them in determining if a lead is viable and worth pursuing. If the process is successful, you can convert the lead into an account. When you convert a lead, the system creates these records:

- Contact Record
- Customer Record
- Opportunity Record

5.2 Entering a Lead

This section provides an overview of the lead entry process and discusses how to:

- Enter leads.
- Import leads.
- Set processing options for the CRM - Manage Leads program (P90CB010).
- Set processing options for the Import Leads program (P90CB015).

5.2.1 Understanding Lead Entry

Before you can begin working with leads, you must enter basic information about those leads into the system. You can choose to enter leads individually, or you can import a list of leads from a spreadsheet. Depending on the source of the leads, the organization might choose to utilize both of these lead entry methods.

For example, if the organization purchases a list of leads, it might be easiest to import that list into the system rather than enter each lead individually. Importing leads can also reduce data entry errors. Alternatively, if you receive leads based on advertisements or individual referrals, you might choose to enter those leads manually as they are received.

When you enter leads into the system, you specify the main contact person's name, company, title, address, phone number, fax number, and email address. You also specify the lead's status, date and time of entry, industry, web URL, search type, and lead owner. Additionally, you can associate a qualification script with the lead. After you enter and save the lead, you can use the script to determine whether the lead is worth pursuing.

When you enter a lead using the CRM - Manage Leads program, the system automatically creates records in the tables:

- F90CB010
- F90CB030
- F90CB01A
- F90CB042
- F90CB043

These records include the default values that you specify in the processing options for the CRM - Manage Leads program unless you override this information during lead entry.

5.2.1.1 Import Leads

To import leads, the list of leads must be stored in a spreadsheet format. The columns on the spreadsheet must be in the same order as those on the Import Leads form. Therefore, it might be necessary to rearrange the columns on the spreadsheet or the form to ensure that data is imported into the correct fields.

You use the Import Leads program (P90CB015) to import leads. You can populate these fields when you import lead information:

- Company (required)
- Last Name (required)
- First Name (required)
- Phone Prefix
- Phone Number
- EMail
- Title
- Industry
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- Postal Code
- County
- Country
- Fax Prefix
- Fax Number
- URL

When you import leads, the system automatically updates these fields (if they are left blank during import) based on the values that you enter in the processing options for the CRM - Manage Leads program:

- Search Type
- Industry
- Status
- Lead Owner
- Date Received
- Qualification

- Qualification Goal
- Lead Source

To enter or update any additional information about the lead, you must manually enter or change the data after the lead has been imported.

5.2.2 Forms Used to Enter Leads

Form Name	FormID	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead	Review and select existing leads, or access the forms needed to enter a new lead.
Add Lead	W90CB010D	Click Add on the Search for Leads form.	Enter a lead.
Lead - Manage {Lead Name}	W90CB010B	Select a record in the detail area of the Search for Leads form, and then click Select.	Update lead information.
Import Leads	W90CB015A	Select Import Leads from the Form menu on the Search for Leads form.	Import a list of leads.

5.2.3 Entering Leads

Access the Add Lead form.

Function Code

Enter the code that indicates the function the lead plays in the company. Examples include:

CO: Chief Officer

CON: Consultant

DIR: Director

MGR: Manager

STAF: Staff

SUPR: Supervisor

Industry

Enter the industry code associated with the lead. If the lead is converted to a customer, this information is used to determine the industry grouping for the customer. The industry grouping is then used to automatically assign sales team members to the customer record.

Search Type

Verify that the system populates this field with **P** (Prospect).

Lead Owner

Enter the Address Book number of the owner of the lead.

Lead Source

Enter the code that specifies the origin of a lead. Values are stored in UDC 90CB/LS, and might include codes to represent items such as marketing events, personal contacts, or customer referrals.

Status

Enter the current status of the lead. Values for this field are stored in UDC 90CB/ST. Examples of status codes include active, dead, or converted.

The system automatically assigns the lead an active status when the lead is entered, and changes the status to converted when the lead is converted to an account. To use any other status values, you must manually update this field.

Date Received

Review the date that the lead was entered into the system. This field is automatically populated when the lead is entered. You can manually override the information in this field if necessary.

Qualification

Select the name of the qualification script that is used to qualify the lead.

Qualification Goal

Review the value in this field to determine the qualification score that the lead must meet to be considered a qualified lead. The system populates this field when you select a qualification. You cannot override the value in this field.

5.2.4 Importing Leads

Access the Import Leads form.

To import leads:

1. On the Import Leads form, select Import Grid Data from the Tools menu.
2. When the import assistant appears, browse to the existing spreadsheet that contains the leads that you want to import.
3. Define the cell ranges that include the leads that you want to import.
4. Click Preview.

The data from the spreadsheet appears in the detail area of the form.

5. Review the data, make any necessary changes, and then click Continue.

The system validates the imported data against the values for each field and displays errors if invalid values exist. Fields that contain invalid values appear highlighted in the detail area.

6. Correct any errors and then click OK.

The system creates the leads and returns to the Search for Leads form, where you can verify that the leads were added successfully.

5.2.5 Setting Processing Options for the CRM - Manage Leads Program (P90CB010)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

5.2.5.1 Defaults

These processing options specify default settings that are used to process lead information.

1. Default Lead Owner

Use this processing option to specify the lead owner to assign to new leads. If you leave this option blank, the system enters the logged in user's Address Book Number in the Lead Owner field.

2. Default Qualification Script

Use this processing option to specify which qualification script to assign to new leads. If you leave this option blank, the system does not assign a qualification script to the lead. To qualify the lead, you must manually enter a script name in the Qualification Script field.

3. Default Search Type

Use this processing option to specify the search type to assign to new leads. If you leave this option blank, the system assigns new leads a search type of **P** (Prospect).

4. Default Industry

Use this processing option to specify the industry grouping that is assigned to new leads. If you leave this option blank, the system does not assign an industry to the lead.

5. Default Primary Address Type

Use this processing option to specify the address type code that is used to identify a lead's primary address. If you leave this option blank, the system assigns address type **B** to the primary address.

6. Default Lead Source

Use this processing option to specify the lead source to assign to new leads. If you leave this option blank, the system does not assign a lead source. Values are stored in UDC (90CB/LS).

5.2.5.2 Display

These processing options specify how information is displayed on the lead forms.

1. Display Convert Lead Button

Use this processing option to hide or display the Convert Lead button. Values are:

Blank: Do not display the Convert Lead button.

1: Display the Convert Lead button.

5.2.5.3 Process

These processing options specify how the system processes lead information.

1. Postal Code Editing

Use this processing option to activate postal code editing. Postal code editing verifies that the postal code exists in the F0117 table. If the postal code exists in the Postal Code Transactions table and the City, County, Country, and State fields are blank; the system

uses the information from the Postal Code Transactions table. If the postal code does not exist in the Postal Codes Transactions table, the system returns a warning. Values are:

Blank or **0**: Do not activate postal code editing.

1: Activate postal code editing.

2. Postal Code Address Retrieval

Use this processing option to activate Postal Code Address Retrieval. If the postal code is valid and address lines one through four are blank, address information can be retrieved from the F0118 table. If the processing option to activate with the Postal Code Selection Window for multiple addresses is set, all available addresses for the postal code are displayed. Values are:

Blank or **0**: Do not activate Postal Code Address Retrieval.

1: Activate with the Postal Code Selection Window for multiple addresses.

2: Activate to retrieve the address information for a single address.

5.2.5.4 Versions

These processing options specify the program versions that the system uses to process lead information.

1. CRM Customer (P90CA087)

Use this processing option to identify the version of CRM Customer Processing Options (P90CA087) that the system uses to create a customer from a lead. If left blank, the system uses version ZJDE0001.

2. Work with Partners (P90CA050)

Use this processing option to identify the version of Work with Partners (P90CA050) that the system uses to retrieve information about all the features and options that are related to partners. If left blank, the system uses version ZJDE0001.

3. CRM Contact (P90CA074)

Use this processing option to identify the version of CRM Contact Processing Options (P90CA074) that the system uses to create a contact from a lead. If left blank, the system uses version ZJDE0001.

4. Manage Opportunities (P90CB020)

Use this processing option to identify the version of Manage Opportunities (P90CB020) that the system uses to create an opportunities from a lead. If left blank, the system uses version ZJDE0001.

5. Import Leads (P90CB015)

Use this processing option to identify the version of Import Leads (P90CB015) that the system uses to retrieve information about all the features and options that are related to Import Leads. If left blank, the system uses version ZJDE0001.

6. CRM Customer Detail (P90CA080)

Use this processing option to identify the version of CRM Customer Detail (P90CA080) that the system uses to when displaying the customer information for a converted lead. If left blank, the system uses version ZJDE0001.

7. Item Catalog (P90CA106)

Use this processing option to identify the version of the Item Catalog program (P90CA106) that the system uses to when displaying the customer information for a converted lead. If left blank, the system uses version ZJDE0001.

8. CRM Activity Extensions

Use this processing option to specify the version of the CRM Activity Extensions.

5.2.6 Setting Processing Options for the Import Leads Program (P90CB015)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

5.2.6.1 Versions

These processing options specify program versions that are used to process lead information.

1. Work With Leads Version (P90CB010)

Use this processing option to specify the version of the CRM - Manage Leads program (P90CB010) that the system uses when importing leads. If left blank, the system uses version ZJDE0001.

5.2.6.2 Process

These processing options specify the manner in which lead information is processed.

1. Postal Code Editing

Use this processing option to specify whether postal code editing is activated. If you activate editing, the system verifies that the lead's postal code exists in the F0117 table. If the postal code exists in the table, and the lead's city, county, state, or country fields are left blank, the system populates these fields with the values from the F0117 that are associated with the lead's postal code. If the postal code does not exist in the F0117, the system produces a warning.

If you do not activate editing, the system does not verify postal codes, and no warnings are produced. Values are:

Blank or **0**: Do not activate postal code editing.

1: Activate postal code editing.

5.3 Maintaining and Updating Leads

This section provides an overview of lead maintenance, lists prerequisites, and discusses how to:

- Qualify leads.
- Assign product interests to leads.
- Assign partners to leads.
- Add new activities to leads.
- Link action plans to leads.

5.3.1 Understanding Lead Maintenance

After you enter basic lead information into the system, you can update and maintain the information that the organization needs to successfully convert the lead to an account.

5.3.1.1 Classification Information

Each organization has information tracking needs that are specific to their business. Using category code fields, you can set up 30 fields that can be used to track information that is specific to the business.

When you enter a lead, you can click the Classification link, and then specify this information by entering values in the Category Code 01 through Category Code 30 fields. You can configure each of these fields to display a title that is appropriate for the type of information you are storing in the field. You can also set up values for each field.

For example, if you want to specify whether the lead has been given a particular piece of marketing material, you can configure one of the category code fields to track this. You can change the field description to read "Brochure A" and create values of Y and N to specify that the client has (Y) or has not (N) received the material.

See *JD Edwards EnterpriseOne Tools Foundation Guide*.

5.3.1.2 Address Information

Typically a lead will have multiple addresses, such as a bill to address and a ship to address. When you enter basic lead information, the system requires you to enter an address. You specify the type of address that is entered during basic lead entry using the processing options for the CRM - Manage Leads program. You can then click the Address link and enter additional addresses for the lead.

5.3.1.3 Lead Qualification

Before the sales representatives invest too much time and effort on a lead, they can qualify the lead to determine whether the lead is worth pursuing.

When you enter basic lead information, the system populates the Qualification field with the default qualification, as specified in the processing options. You can change the qualification at any time before the lead is converted.

When you click the Qualification link, the system displays the questions that were created for the selected qualification. The sales representative can ask the questions to the lead and enter the answers into the system. The system automatically scores the lead based on these answers. If the qualification score meets or exceeds the qualification goal, the lead is considered qualified.

Note: The qualification score is informational only. If a lead does not meet or exceed the qualification goal, a user can still convert the lead to a customer. Sales representatives should use qualification scores and goals to assist in making educated decisions about whether to continue pursuing the lead.

5.3.1.4 Product Interests

When you work with a lead, you identify the goods or services that the lead might be interested in purchasing. You can enter product interest information for each lead. Using the Product Interest link, you can attach product catalogs or product catalog categories to the lead. The sales representative can use this information to determine how to proceed with the sales cycle.

5.3.1.5 Partners

Many organizations work with outside companies, or partners, when trying to sell goods or services. To help track the partners are actively working on each lead, you can assign partners to the lead. The partner must exist in the system before you can attach it to a lead.

Note: You can enter a partner in the Lead Owner field. Typically, you enter a partner in this field only if the partner assumes the main responsibilities associated with the lead.

5.3.1.6 Activities and Action Plans

After you enter a lead into the system, you can attach activities to the lead. Activities are the tasks that can help a sales representative convert a lead into an account. You can create new activities for each lead, or you can attach an action plan to a lead.

An action plan is a predefined list of activity templates. Typically, the activity templates associated with an action plan are separated into the different sales cycle steps in which they should be performed. When you attach an action plan to a lead, the system creates activities for the lead based on the associated templates. The action plan assists the sales representative in managing and carrying out the appropriate activities for each lead, at the appropriate time.

5.3.2 Prerequisites

Before you complete the tasks in this section:

- Set up qualification scripts.
- Enter sales team members and partners into the system.
- Set up product catalogs and items.
- Create activities and action plans.
- Set up category code fields.

See Also:

- [Setting Up Qualification Scripts.](#)
- [Managing the Sales Force.](#)
- "Managing Items and Item Catalogs for CRM" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.
- "Using Foundation Calendar" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.
- *JD Edwards EnterpriseOne Tools Foundation Guide*.

5.3.3 Forms Used to Maintain and Update Leads

Form Name	FormID	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead	Select an existing lead.
Lead - Manage {Lead Name}	W90CB010B	Select a lead on the Search for Leads form, and click Select.	Use this form to: <ul style="list-style-type: none"> ■ Enter and maintain lead information. ■ Enter attachments for leads.

5.3.4 Qualifying Leads

Access the Lead - Manage {Lead Name} form. Select the Lead tab. Click the Qualification link.

Figure 5–1 Lead - Manage {Lead Name} form: Lead tab: Qualification link

Lead - Lead - Manage Johnson, William

Lead Partner Activities Attachments

Detail Classification Address **Qualification** Product Interest

Save Changes Undo Changes Close

Find

Records 1 - 3

Question	Answer ID	Answer	Comment
Does the customer currently have a budget?	1	Yes	
What is the customer's budget?	3	> 200000	
When is the customer looking to purchase product?	9	1-2 months	

Save Changes Undo Changes Close

Click the Find button to view all of the questions that are associated with the specified qualification. After you have asked and answered all questions, click the Save Changes button. The system automatically calculates the qualification score and populates the Qualification Score field.

Comment

Enter any additional information, other than the specific answer ID, that the lead provides when answering the specified question.

For example, a sales representative might ask the question, "Are you in the market to buy widgets?" The lead answers, "Maybe, if the price was right." To capture all of the relevant information, you select the **Maybe** answer in the Answer ID field, and then enter **Lead is likely to purchase widgets if the price is within their budget** in the Comment field.

5.3.5 Assigning Product Interests to Leads

Access the Lead - Manage {Lead Name} form. Select the Lead tab. Click the Product Interest link.

To assign product interests to a lead:

1. Click the Assign Product Interests button.
2. On the Select from Catalog form, you can expand or collapse the catalog hierarchy to display relevant product information.

When you select a row in the Catalog section of the form, the catalogs that are associated with the catalog category are displayed in the grid on the right side of the form.

3. Select each catalog or catalog category that you want to assign to the lead record, and then click OK.

Alternatively, click the Advanced Catalog Search link, select the catalogs that you want to assign to the lead, and then click Select.

4. The system returns you to the Product Interest grid, and displays the selected catalogs in the detail area.
5. Click the Save Changes button to add the product to the lead, or click the Undo Changes button to remove the product interest.
6. To remove a product from the lead after it has been added and saved, select the product and then click the Remove button.

5.3.6 Assigning Partners to Leads

Access the Lead - Manage {Lead Name} form. Select the Partner tab.

To assign partners to a lead:

1. Click the Assign Partners button.
2. On the Link Partner form, select all of the partners that you want to assign to the lead, and then click Select.

The system returns you to the Partner tab and displays the selected partners in the detail area of the form.

3. To remove a partner from the lead, select the partner and then click the Remove button.

5.3.7 Adding New Activities to Leads

Access the Lead - Manage {Lead Name} form. Select the Activities tab. Click the Activities link.

To add a new activity to a lead:

1. Click the Add button.
2. On the Add Activity form, complete the steps to create a valid activity, and then click the Save and Close button.
3. The system returns you to the Activities tab and displays the new activity in the detail area of the form.

5.3.8 Linking Action Plans to Leads

Access the Lead - Manage {Lead Name} form. Select the Activities tab. Click the Activities link.

To link an action plan to a lead:

1. Click the Link Action Plan button.
2. On the Action Plan Search and Select form, select the action plan that you want to associate with the lead, and then click Select.
3. The system returns you to the Activities tab and displays the newly-created activities in the detail area of the form.

The activities that the system creates for the lead are based on the activity templates that are associated with the selected action plan.

5.4 Converting Leads

This section provides an overview of the lead conversion process and discusses how to:

- Convert leads to opportunities.
- Locate the new customer record.
- Locate the new contact record.
- Locate the new opportunity record.

5.4.1 Understanding the Lead Conversion Process

If it appears as though the sales lead is qualified, and is interested in making a purchase, you can convert the lead to an opportunity. Opportunity records allow you to track more detailed information about potential sales. To convert a lead to an opportunity, you click the Convert Lead button on the Lead - Manage {Lead Name} form. After you convert the lead, the system changes the lead's status to converted, and then disables all of the fields and options on the lead record. The system then creates these records:

- **Customer Record**

The system uses the value in the Company Name field to create a customer record in the F90CA080 table.

If a customer record already exists with the same company name, the system compares the city and postal code information from the existing customer record to the lead record. If the city and postal code also match, the system displays the Duplicate Customer form to notify you that a customer record already exists for this company. You can choose to add a new customer record or use the existing customer record.

- **Contact Record**

The system uses the values in the First Name and Last Name fields to create a contact record in the F90CA070 table.

If an existing customer was selected, and if a contact record already exists with the same first and last name, the system displays the Duplicate Contact form to notify you that a contact record already exists for this person. You can choose to add a new contact record or use the existing contact record.

If the system creates a new customer record, the system also creates a new contact record, regardless of whether a contact record already exists for that person.

- **Opportunity Record**

The system creates an opportunity record in the F90CB020 table using the newly created contact and customer records. After the lead is converted you can then enter additional information into the opportunity, such as item and quantity information.

Depending upon the data that is included in the lead record, these tables might also be updated when a lead is converted:

- F01161
- F01161Z1
- F0115

- F01151
- F011901
- F90CB02I
- F90CB02J
- F90CB02C
- F90CB02E
- F90CB043
- F90CB042
- F90CB05B
- F01301
- F90CA61E

After conversion, you cannot change the lead record. To make changes to any information associated with the lead, you must access the newly created customer, contact, or opportunity records.

5.4.2 Forms Used to Convert Leads

Form Name	FormID	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead	Select an existing lead.
Lead - Manage {Lead Name}	W90CB010B	Select a lead on the Search for Leads form, and click Select.	Convert a lead or access the converted customer record.
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer	Review the converted customer record.
Search for Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact	Review the converted contact record.
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Review the converted opportunity record.

5.4.3 Converting Leads to Opportunities

Access the Lead - Manage {Lead Name} form. Select the Lead tab. Click the Detail link.

To convert a lead to an account:

1. Click the Convert Lead button.

The system changes the lead status to converted, disables all of the fields and functions on the Lead - Manage {Lead Name} form, and all related tabs, and creates new customer, contact, and opportunity records.

2. Click the Close button to exit the form.

On the Search for Leads form, you can verify that the lead was converted by reviewing the Status field and verifying that the system changed the value to **CON** (converted).

5.4.4 Locating the New Customer Record

Access the Search for Customers form.

Alternatively, you can click the Converted Customer link on the Lead - Manage {Customer Name} form to access the converted customer record after you convert the lead. The link appears next to the Company field.

Name

Enter the name of the company that was associated with the converted lead in the Name field to locate the newly created customer record.

Customer Number

Review and note the value in this field. The system automatically generates this customer number when a lead is converted. You can use this customer number when searching for opportunities, quotes, sales orders, or contact records that are associated with this customer.

5.4.5 Locating the New Contact Record

Access the Search for Contacts form.

Contact Name

Enter the name of the lead contact in this field to verify that the system created the appropriate contact record during lead conversion. The contact record is created using the First Name and Last Name fields from the lead.

For example, if the value in the First Name field of the lead record was **John** and the value in the Last Name field of the lead record was **Franks**, enter **John Franks** in the Contact Name field, and then click Find to verify that a contact record was created when the lead was converted.

Address Number

Enter the customer number that was created when the lead was converted to an account. The system automatically creates a contact record for the converted lead and enters the newly created customer number in this field.

Address Name

Enter the name of the company that was associated with the converted lead in the Address Name field to locate the newly created contact record.

5.4.6 Locating the New Opportunity Record

Access the Search for Opportunities form.

Sold To Customer

Enter the customer number that was created when the lead was converted to an account. The system automatically creates an opportunity record for the converted lead and enters the newly created customer number in this field.

Managing Sales Opportunities

This chapter contains the following topics:

- [Section 6.1, "Understanding Sales Opportunities"](#)
- [Section 6.2, "Entering Opportunities"](#)
- [Section 6.3, "Managing and Maintaining Opportunities"](#)
- [Section 6.4, "Creating Quotes and Sales Orders for Opportunities"](#)

6.1 Understanding Sales Opportunities

Opportunities represent potential revenue to a sales organization. They are the leads that have been qualified and have progressed to a point where there is a higher probability of closing a sale. You can enter opportunities manually or allow the system to create opportunities when converting leads.

You access opportunity forms and programs using the Manage Opportunities program (P90CB020); however, the system uses all of these programs to process opportunity information:

- Opportunity - Sales Methodology Search & Select Program (P90CB021).
- Opportunity_Qualification Search and Select Program (P90CB022).
- Opportunity - Sales Cycle Search & Select Program (P90CB023).
- Opportunity Reusable Subforms Program (P90CB024).
- Opportunity Competitor Program (P90CA06C)
- Opportunity Search and Select Program (P90CB025).
- Opportunity Sales Team Program (P90CB026).
- Opportunity Sales Driver Program (P90CB027).
- Opportunity Cost Program (P90CB029).
- Opportunity Influencer Program (P90CB030).

Depending upon the type of information that you include on the opportunity, records are created in these tables:

- F90CB020
- F90CB02C
- F90CB02D
- F90CB02E

- F90CB02I
- F90CB02J
- F90CB02M
- F90CB05B
- F90CA61E

After you enter the opportunity, you can then attempt to qualify it to determine whether the organization should pursue the opportunity further into the sales cycle. If the opportunity is qualified, members of the sales team can continue through the sales cycle in hopes of converting the opportunity into a sale.

To manage and maintain the opportunity effectively, you must provide as much information as possible to each member of the sales team. You can enter and update information for each opportunity, such as:

- The products and quantities that the customer is interested in.
- The factors that drive the customer's decision to purchase goods or services from the organization.
- Who the influential people are that make decisions regarding the opportunity.
- The costs that the sales team incurs when working with the opportunity.
- The activities that should be completed to successfully convert the opportunity to a sale.
- The members of the sales team who are actively working on the opportunity.

If a sales team is able to manage the opportunity successfully, and continue further along into the sales cycle, the opportunity contact might want to receive a formal quote for the goods or services in which they are interested. You can create a quote directly from the Manage Opportunities program. Sales quotes are managed and processed in Oracle's JD Edwards EnterpriseOne Sales Order Management system.

Lastly, you can convert the opportunity into a sales order. You can create the sales order from the Manage Opportunities program, however, you use the JD Edwards EnterpriseOne Sales Order Management system to manage and process the sales order information.

See Also:

- [Converting Leads.](#)
- *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.*

6.2 Entering Opportunities

This section provides an overview of opportunity entry and discusses how to:

- Enter basic opportunity information.
- Set processing options for the Manage Opportunities program (P90CB020).

6.2.1 Understanding Opportunity Entry

When you enter an opportunity, you enter basic information about the contact, the company, and the industry associated with the opportunity. If the system created the opportunity during lead conversion, much of this information is automatically entered

in the opportunity record. However, you should review the record and enter any additional information as necessary.

The information that you enter for the opportunity is used to provide the sales team with all of the information that they need to successfully convert the opportunity to a sale. You can also use this information to track successes, failures, and trends in sales and marketing strategies and processes. For example, you can enter the source of each opportunity. You can then use this information to determine which marketing or advertising campaigns and events have led to the most opportunities.

You can also enter a monetary amount in the Budget field. This field can be used to store:

- The amount of money available to the sales team when working on this opportunity.
- The amount of money that the customer has budgeted for this sale.

You decide how to use this field, depending upon the needs of the organization.

As the sales team works with the opportunity, they enter the costs that they incur. You can produce these reports to determine whether a sales team is within its budget for a specified opportunity:

- Opportunities by Channels for a Sales Rep Report (R90CB020E).
- Opportunity Summary Report (R90CB020I).

Additionally, you can enter information about the sales methodology that the sales team should use when working on the specified opportunity. Sales methodologies are used to assist sales representatives in carrying out all of the necessary steps to successfully sell certain types of goods or services. After you enter a sales methodology on an opportunity, you then specify the current sales cycle step on which the sales team is working. The system uses the probability associated with the sales cycle step, along with any monetary value associated with the opportunity to determine the amount of potential revenue to enter into the sales pipeline. This information is used for revenue projections.

Before you can enter opportunities or create opportunities during lead conversion you must set the processing options for the Manage Opportunities program (P90CB020).

6.2.1.1 Credit Check

After you have determined that the opportunity is qualified, you can click the Credit Check button to check the customer's credit. The system automatically populates these fields on the opportunity using data that is stored in the F03012 table for the sold to customer:

- **Credit Message**

The system uses the value in the Line of Business field to retrieve the credit message. This field is read-only. The system displays a message to notify the user of the customer's credit status.

If the customer is exempt, the system displays "Credit check passed. Exempt from credit check." If there is no credit limit specified, the system displays "Credit check passed. No credit limit specified." If the customer has a credit limit that has not been exceeded, the system displays "Credit check passed. Credit limit not exceeded." If the limit has been exceeded, the system displays "Credit check failed. Credit limit has been exceeded."

- **Limit**

- Exposure
- Available

Note: If you have not set up credit information for this customer in Oracle's JD Edwards EnterpriseOne Accounts Receivable system, the system does not populate these fields when you click the Check Credit button. Also, the values in the credit fields are informational and do not restrict the amount that you can enter in the Potential Amount field, or the total of the line items that you can enter for the opportunity.

If you do not want sales representatives to check credit information, or if you are not tracking credit information for customers, you can disable the Check Credit button by setting a processing option for the Manage Opportunities program (P90CB020).

See Also:

- "Setting Up Customer Master Information" in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*.

6.2.2 Forms Used to Enter Opportunities

Form Name	FormID	Navigation	Usage
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Select existing opportunities, or access forms to add new opportunities.
Add Opportunity	W90CB020C	Click Add on the Search for Opportunities form.	Enter basic opportunity information.

6.2.3 Entering Basic Opportunity Information

Access the Add Opportunity form.

Figure 6–1 Add Opportunity form

Opportunity - Add Opportunity

Save and Close Save and Continue Save and Add New Cancel

Description * Capital Company Opportunity Number

Opportunity Type * Direct Source

Partner Contact -- Select One --

Sold To * 4242 Capital System DO NOT MODIFY Contact Joe Smith

Line Of Business 00000 Oracle - J.D. Edwards

Credit Message

Credit Check Limit Exposure Available

Ship To 4242 Capital System DO NOT MODIFY Contact -- Select One --

Qualification Name Office Supply Script Goal 60 Score 0

Sales Methodology * QA Contact Sales Methodology Probability 25

Sales Cycle * Cycle 1 Close Date 12/23/2011

Currency Code USD U.S. Dollar

Potential Amount .00

Budget Amount .00

Line Item Total .00

Lost To Win/Loss Reason -- Select One --

Save and Close Save and Continue Save and Add New Cancel

After you enter basic opportunity information, you can click the Save and Close button to exit the program. You can click the Save and Add New button to enter basic information for another opportunity, or you can click the Save and Continue button to continue working with the opportunity record. If you choose to continue working with the opportunity record, proceed to the Managing and Maintaining Opportunities section of this chapter for additional information.

Opportunity Type

Enter the type of opportunity you are entering. Values are stored in UDC 90CB/TC and might include types such as:

DIR: Direct

REF: Referral

PAR: Partner

Source

Enter the manner in which the opportunity was obtained. Values for source are stored in UDC 90CB/LS. You can enter generalized codes or specific codes to track the success of particular marketing campaigns and events. For example, you might set up general codes such as Referral, Advertising, and Event.

To track the success of particular advertising or marketing events, you can enter each advertising campaign or marketing event in the UDC table, such as New York Expo, California Tech Show, or Daily News Ad.

Contact (Partner)

Select the partner contact from the available options. When you enter a partner's address book number in the Partner field, the system makes the contacts associated with that partner available for selection. You can select one partner contact.

Contact (Sold To)

Select the sold to contact from the available options. When you enter a customer number in the Sold To field, the system makes the contacts associated with that customer number available for selection. You can select one sold to contact.

Line of Business

Review the value in this field to determine the company with which the opportunity is associated. If Line of Business is selected on in the Accounts Receivable Constants form, the system uses the branch to retrieve the default line of business company. If Line of Business is not selected, the system uses the default value of **00000**. If Line of Business is selected and the company is set up in the F03012 table, the company is used. If the company is not set up, the system uses the default value of **00000**.

Contact (Ship To)

Select the ship to contact from the available options. When you enter a customer number in the Ship To field, the system makes the contacts associated with that customer number available in this field. You can select one ship to contact.

Qualification Name

Enter the name of the qualification script that should be used to qualify the opportunity. If you leave this field blank, the system enters the default qualification that is specified in the processing options of the Manage Opportunities program (P90CAB020).

Goal

Review the value in this field to determine the score that the opportunity needs to meet or exceed to be considered qualified. The system populates this field with the value that was entered when the associated qualification script was created.

Score

Review this field after you attempt to qualify an opportunity to determine whether the score meets or exceeds the qualification goal. If the value in this field is greater than or equal to the value in the Goal field, the opportunity is qualified.

Sales Methodology

Enter the sales methodology that should be used by sales representatives who are working on the opportunity. When you enter a new opportunity, this field is populated using the value that you enter in the processing options. If you leave this option blank, the system populates the sales methodology field with the default methodology. You can change the methodology if necessary.

Sales Cycle

Select the current sales cycle step that is associated with the opportunity from the available options. The available options include the sales cycle steps that are associated with the methodology that you enter in the Sales Methodology field. When you add a new opportunity, the system enters the first sales cycle step for the default sales methodology. You can change this value if necessary. Each time the sales cycle step changes, the sales team members associated with the opportunity are notified of the change using email. You specify, in the CRM constants, whether the notification is sent to the internal employee work center or to an external email address.

Probability

Review the value in this field to determine the probability of converting the opportunity to a sale. The system populates this field with the probability that is associated with the current sales cycle step.

The probability is used in several ways. First, the probability must be greater than zero (0) to convert the opportunity to a quote, it must be 100 percent to convert the opportunity to a sales order, and it must be zero (0) in order to enter a value in the Lost To field. Additionally, the probability is used in calculating the amount of potential revenue that is entered into the sales pipeline for the opportunity.

Close Date

Review, and if necessary, update the date in this field. This date represents the date by which the opportunity should be closed or finished. The system calculates the close date and populates this field. The date is determined by adding to the system date the months-to-close value that is associated with the current sales cycle step. You can change this date if necessary.

Potential Amount

Enter the monetary value that could potentially be realized by the organization if the opportunity is converted to a sale. If the Line Item Total field is blank, this value is used to determine the amount of revenue when creating sales forecasts, and also to determine the number of gold bars to display for the related customer. However, if there is a value in the Line Item Total field, that value is used to determine the amount of revenue included in a sales forecast and gold bar display.

Additionally, you can set the processing options for the Manage Forecasts program (P90CB060) to use the value in this field or the value in the Line Item Total field when calculating revenue.

Budget Amount

Enter either the amount of money that the client has budgeted for this sale, or the monetary amount that is available for the sales team to use when pursuing the opportunity. This value is informational only and can be used by the sales team when setting item prices for the customer, or it can be compared against the costs associated with the opportunity to determine whether the sales team is over or under budget.

Line Item Total

Review the monetary amount that is associated with total number of goods or services entered in the detail area of the form. This field is read-only and is updated each time a line in the detail area is added, changed, or deleted. This value can be used to determine the revenue amount associated with sales forecasts, as well as the number of gold bars that are displayed for the associated customer. If this field is blank, the system uses the value in the Potential Amount field to determine the gold bar display.

Lost To

Enter the competitor that the customer chose to purchase goods and services from. This field is enabled only when a sales cycle with a probability of zero (0) is entered on the opportunity record.

Lost Reason

Enter the reason that the opportunity was not converted to a sale. Four lost reason codes are supplied for you; however, you can add additional codes if necessary. Values are stored in UDC 90CB/LR, and include:

COMPET: Competitor Undercut.

LOSFB: Loss of Funding/Budget.

OVPRC: Pricing too high.

PDNMN: Product does not meet needs.

6.2.4 Setting Processing Options for the Opportunity Program (P90CB020)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

6.2.4.1 Display

These processing options specify which tabs are displayed when processing opportunity information.

1. Display Influencer Tab

Use this processing option to specify whether the Influencer tab appears on the Opportunity - Manage {Customer Name} form. Values are:

Blank: Yes, display the tab.

1: No, do not display the tab.

2. Display Attachments Tab

Use this processing option to specify whether the Attachments tab appears on the Opportunity - Manage {Customer Name} form. Values are:

Blank: Yes, display the tab.

1: No, do not display the tab.

6.2.4.2 Default

These processing options specify the default values to use when processing opportunity information.

1. Default Opportunity Branch Plant

Use this processing option to specify the default branch plant that is associated with the opportunity. This value is used to determine product pricing for the opportunity and line of business company.

2. Default Opportunity Type Code

Use this processing option to specify the default opportunity type that is used when entering an opportunity record.

3. Sales Methodology ID

Use this processing option to specify the default sales methodology that is used when entering an opportunity record. If you leave this option blank, the system populates the sales methodology field using the methodology that has been set as the default.

4. Branch/Plant

Use this processing option to specify how the system selects the default branch/plant for tracking costs. Enter a value in this option only if processing option 1 is blank.

You can set up header branch/plant defaults based on the user ID or terminal, or based on the business unit for the ship to address in Address Book Revisions (P0101). Values are:

Blank: The system uses the default location based on the user ID or terminal ID and displays the branch/plant in the order header form. You set up the default branch/plant based on the user or terminal ID in Default Location and Printers (P400951).

1: The system uses the business unit that you specify on the Address Book Revisions form for the customer to which you are shipping the goods (ship to).

2: The system uses the business unit that you specify on the Address Book Revisions form for the customer to which you are selling the goods (sold to).

5. Sales Team Employee Search Type

Use this processing option to specify the default search type to use when assigning sales team members to the opportunity record. Values are stored in UDC 01/ST.

6.2.4.3 Process

These processing options specify the processes that can be performed when working with opportunity information.

1. Opportunity editable

Use this processing option to specify whether existing opportunities can be edited when inquired upon. Values are:

Blank: Allow users to edit existing opportunities.

1: Do not allow users to edit existing opportunities.

2. Allow Credit Check

Use this processing option to specify whether users can perform a credit check on the sold to customer associated with an opportunity. If the credit check is allowed, the Check Credit button is enabled. Values are:

Blank: Allow credit check.

1: Do not allow credit check.

3. Allow Convert to Sales Order

Use this processing option to specify whether users can convert an opportunity to a sales order. If conversion is allowed, the Convert to Sales Order button is enabled. Values are:

Blank: Allow conversion to sales order.

1: Do not allow conversion to sales order.

4. Allow Convert to Quote

Use this processing option to specify whether users can convert an opportunity to a quote. If conversion is allowed, the Convert to Quote button is enabled. Values are:

Blank: Allow conversion to quote.

1: Do not allow conversion to quote.

6.2.4.4 Versions

These processing options specify the versions of related programs that the system uses when processing opportunity information.

1. Quote Order Entry (P42101)

Use this processing option to specify the version of the Quote Order Entry program (P42101) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0003.

2. Sales Order Entry (P42101)

Use this processing option to specify the version of the Sales Order Entry program (P42101) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

3. Work With Activities (P01301)

Use this processing option to specify the version of the Work With Activities program (P01301) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

4. Competitor Find Browse (P90CA06C)

Use this processing option to specify the version of the Competitor Find Browse program (P90CA06C) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

5. Item Catalog (P90CA106)

Use this processing option to specify the version of the Item Catalog program (P90CA106) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

6. Manage Partner (P90CA050)

Use this processing option to specify the version of the Manage Partner program (P90CA050) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

7. Contact Revisions (P90CA070)

Use this processing option to specify the version of the Contact Revisions program (P90CA070) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

6.3 Managing and Maintaining Opportunities

This section provides an overview of opportunity maintenance and discusses how to:

- Qualify opportunities.
- Add products to opportunities.
- Updating sales drivers on opportunities.
- Add new sales drivers to opportunities.
- Add influencers to opportunities.
- Add costs to opportunities.
- Add competitors to opportunities.
- Add new activities to opportunities.
- Attach action plans to opportunities.
- Assign sales team members to opportunities.
- Update sales team information.

6.3.1 Understanding Opportunity Maintenance

To successfully manage the sales cycle, you must provide sales representatives with an easy to use method of maintaining and reviewing information that is critical to their sales opportunities. After you enter basic opportunity information, you can add all of the additional information that is necessary to effectively and efficiently manage sales opportunities.

6.3.1.1 Qualification

After you enter an opportunity, the next step is to qualify the opportunity. When you qualify an opportunity, you determine whether it makes sense for the organization to pursue the opportunity. Using qualification scripts, sales representatives can ask product- or service-related questions to the contact person who is associated with the customer's opportunity. The sales representative enters the answers into the system, and the system calculates the opportunity's qualification score.

If the score meets or exceeds the qualification goal, the opportunity is considered qualified and should be pursued. After you qualify the opportunity, the sales team continues to work through the sales cycle with the hopes of converting the opportunity to a sale.

Note: The qualification score is an informational tool that should be used to assist sales representatives in determining whether to pursue an opportunity. If an opportunity's qualification score is less than the qualification goal, the system does not prohibit the creation of quotes or sales orders associated with the opportunity.

6.3.1.2 Product Information

You can add products to an opportunity so that each sales representative that views the opportunity is aware of the products that the potential customer is interested in and the quantity that they might want to purchase.

When you add a product to an opportunity, you can enter the quantity for each product. The system uses the information that you entered when you created the product item, calculates the amount of the potential sale, and populates the Line Item Total field on the Opportunity - Manage {Opportunity Name} form.

You can enter specific items on an opportunity or the catalog that contains items in which the customer is interested. If you enter a catalog, you must enter at least one individual item before the opportunity is converted to a sales order. If the item has a base price associated with it, the system populates the price field on the opportunity. For the system to populate the price field, the prices must be set up in the F4106 table. However, you can override the price for items if necessary.

Additionally, you can enter miscellaneous items on the opportunity that have not yet been created in the Item Master. To enter an item that does not have an Item Master record, leave the Item Number field blank, and enter **M** in the Line Type field. You can also enter a request date for the items.

Depending upon how you set the processing options for the Manage Forecasts program (P90CB060), the system uses the amount in the Line Item Total field or the Potential Amount field to calculate revenue in sales forecasts.

The system uses the potential amount to calculate the pipeline amount that is associated with the opportunity. The values in the Line Item Total or Potential Amount fields are also used to determine the number of gold bars that the system displays for the associated customer account.

Lastly, you can enter configured items into the sales opportunity. However, the items are not configured until the opportunity is converted to a quote.

See [Forecasting Sales Revenue](#).

See "Managing Items and Item Catalogs for CRM", in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

"Managing Items", in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*

"Associating an Item with a Partner", in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*

See "Working with Configured Items" in the *JD Edwards EnterpriseOne Applications Configurator Implementation Guide*.

See "Setting Up Base and Standard Pricing" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

6.3.1.3 Sales Drivers, Influencers and Competitors

To successfully sell products and services, it is critical that sales representatives know who the key players are in a deal, and that they understand their key concerns. For each opportunity record, you can enter the influencers, or key players. You can include information about each influencer, such as their perspective on the sale/purchase, and the role they hold within their organization. For example, you can enter information to specify that one influencer is an enthusiastic executive, and another influencer is a pessimistic financial employee. Sales representatives can use this information to determine how to effectively sell to the customer.

You can also enter sales drivers for each opportunity. Sales drivers are the key factors that a potential client is looking at to determine whether to purchase goods or services. When you enter a sales driver, you can also assign it an importance level, which helps the sales representatives understand which items are most important to the customer, and therefore, are important to the sale.

For example, influencers might specify that price, availability, and customer service are their three main areas of concern when purchasing products from an organization. These are the sales drivers. To ensure that each sales representative that works on the opportunity is aware of these factors, you can add each of the drivers to the opportunity and rank them in order of importance.

Before you can add an influencer to an opportunity record, you must create a contact record for that person.

See "Managing Contacts" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

You can also attach competitors to an opportunity. Attaching competitors enables the sales team to determine who they are competing against.

See [Managing Competitor Data](#).

Note: You can use the processing options for the Manage Opportunities program to specify whether the system displays the Influencer link on the opportunity record. Therefore, if the link does not appear on the Opportunity - Manage {Company Name} Opportunity form, the processing option has been set to hide the link. You can change this processing option at any time.

6.3.1.4 Track Costs

To determine whether the organization actually makes money on a sale, you must be able to track the costs associated with closing the sale. You can set up cost types, and enter each cost that is directly related to each opportunity. If you choose to use the Budgeted Amount field to track costs associated with sales opportunities, you can then run reports to determine whether opportunities are over budget.

When you enter a cost, you must associate it with a company or contact person for the opportunity. Therefore, you must first verify that a Who's Who record exists for the entity for whom the expense was incurred before entering the cost into the system.

Tracking the costs associated with each opportunity can help you:

- Analyze spending trends.
- Create sales budgets.

6.3.1.5 Activities and Action Plans

Typically, an organization researches the sales cycle for their products and services and develops sales strategies that representatives can use to help them close sales. Many times, sales strategies include predefined activities that sales representatives can carry out to assist with a sale.

You can create new activities, search on existing activities associated with the opportunity, or delete activities associated with the opportunity. You can also link action plans to the activity. An action plan is a list of activity templates. When you link an action plan to an opportunity, the system creates new activities for the opportunity based on the activity templates associated with the action plan. If you have attached an action plan to the sales cycle that is associated with the opportunity, the activities associated with that action plan are automatically added to the opportunity record. For example, you might have sales representatives attach an action plan that includes these activities to all opportunities associated with widget sales:

- Activity 1 - Qualify opportunity.
- Activity 2 - Send marketing material to customer.
- Activity 3 - Follow up call to customer to schedule demonstration.
- Activity 4 - Generate proposal documents.

After you have attached activities to an opportunity, sales representatives can view the activities in their calendars. Each activity appears on the calendar. You can use this calendar to verify that activities are scheduled properly.

See "Using Foundation Calendar" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.

6.3.1.6 The Opportunity Sales Team

When you create an opportunity, the system copies the sales team from the associated customer record to the opportunity record. The system uses the CRM Constants to determine whether to copy the sales team from the sold to customer, the ship to customer, or both. For example, the opportunity might have one customer in the Sold To field and another in the Ship To field. If the CRM Constants are set to Ship To, the system copies all of the active sales team members from the ship to customer's sales team into the opportunity record. After a sales team member has been added to an opportunity record, the system does not make any automated changes to the team, even if the sales team of the associated customer changes.

You can review the sales team for the opportunity, and make manual changes as necessary. You can add additional sales team members to the opportunity and define sales team roles at the opportunity level as well.

You can also enter commission information for each sales team member. You can select the Apply Commissions option for each sales representative on the sales team that should receive commissions. This option is enabled only if commission information for the sales team member exists in the F42140 table.

You can also specify the revenue percentage that each member of the sales team should receive if the opportunity is converted to a sale. The total of the revenue percentages entered for the sales team cannot exceed 100 percent. For example, if three members of a sales team should receive commissions, you must determine the percentage, out of 100, that each sales team member should receive credit for. This example illustrates how you might assign percentages:

- Sales Rep 1 (owner): 40 percent.
- Sales Rep 2: 30 percent.
- Sales Rep 3: 30 percent.

See "Setting Up Order Processing Information", in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

- "Setting Up Commission Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

6.3.1.7 Cycle Step History

Typically, as the sales team progresses with a sales opportunity, they move from one sales cycle step to the next. Each time the sales cycle step changes on an opportunity, a record is created on the Cycle Step tab. Additionally, each time the sales cycle step changes, the sales team members associated with the opportunity are notified of the change using email. You specify, in the CRM constants, whether the notification is sent to the internal employee work center or to an external email address.

See [Delivered Workflow for JD Edwards EnterpriseOne Customer Relationship Management Sales Applications](#).

When you create sales cycle steps, you enter the expected amount of time it should take to close the sale. You can review the information on the Cycle Step tab to determine whether sales opportunities are being closed in the appropriate amount of time. You might also find, by reviewing this information, that the time estimates need to be adjusted. For example, if the majority of the sales opportunities are taking longer to close than the sales cycle step allows, it might be necessary to increase the amount of time associated with the cycle step.

6.3.1.8 Attachments

You can add multiple attachments to an opportunity record. For example, if you create a proposal for the opportunity, you can attach it to the opportunity to track the information that has been sent to that customer.

Note: You can use the processing options for the Manage Opportunities program to specify whether the system displays the Attachments tab on the opportunity record. Therefore, if the tab does not appear on the Opportunity - Manage {Company Name} Opportunity form, the processing option has been set to hide the tab. You can change this processing option at any time.

6.3.2 Forms Used to Maintain Opportunities

Form Name	FormID	Navigation	Usage
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Select existing opportunities, or access forms to add new opportunities.
Opportunity - Manage {Customer Name} Opportunity	W90CB020A	Select a record on the Search for Opportunities form.	Manage and maintain opportunities.
Add Sale Driver	W90CB027D	Select the Opportunity tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Sale Driver link and then click Add.	Add new sales drivers to an opportunity
Add Influencer	W90CB030A	Select the Opportunity tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Influencer link and then click Add.	Add an influencer to an opportunity.
Add Opportunity Cost	W90CB029A	Select the Opportunity tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Cost link and then click Add.	Add costs to an opportunity.
Competitor Link List	W90CA06CF	Select the Opportunity tab on Opportunity - Manage {Customer Name} Opportunity form. Click the Competitor link and then click Assign Competitor.	Add a Competitor to an opportunity.
Add Activity	W01301B	Select the Activities tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Activities link and then click Add Activity.	Add new activities to an opportunity.
Action Plan Search & Select	W01401A	Select the Activities tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Activities link and then click Link Action Plan.	Link an action plan to an opportunity.
Edit Sales Team	W90CB026B	Select the Sales tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Sales Team link and select a member of the team.	Update sales team information.
Assign Sales Team	W90CA041A	Select the Sales tab on the Opportunity - Manage {Customer Name} Opportunity form. Click the Sales Team link and then click Assign Sales Team.	Add sales people to the sales team.

6.3.3 Qualifying Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Opportunity tab. Click the Qualification link.

Click the Find button to view all of the questions that are associated with the specified qualification. After you have asked and answered all questions, click the Save Changes button. The system automatically calculates the qualification score and populates the Qualification Score field on the Opportunity - Manage {Customer Name} Opportunity form.

Comment

Enter any additional information, other than the specific answer ID, that the opportunity contact provides when answering the specified question.

For example, a sales representative might ask the question, "Are you in the market to buy widgets?" The contact answers, "Maybe, if the price was right." To capture all of the relevant information, you select the **Maybe** answer in the Answer ID field, and then enter **She is likely to purchase widgets if the price is within their budget.** in the Comment field.

6.3.4 Adding Products to Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Opportunity tab. Click the Detail link.

Figure 6–2 Opportunity - Manage {Customer Name} Opportunity form

Quantity	UOM	Product Catalog	Item Number	Item Description	Line Type	Unit Price	Extended Price	Line Number	Requested Date
1	EA		OPPCRM1	Opportunity CRM Item	S	100.0000	100.00	1,000	05/17/2004

Line Item Total

Review the amount in this field to determine the total value of the products or services that are entered in the detail area of the form. The system calculates the extended price for each item, and populates this field with the sum of the extended price column.

Unit Price

Review, and if necessary, update the value in this field. This value represents the base price to be charged for one unit of this item. In the Sales Order Management system all prices must be set up in the F4106 table.

The system multiplies this value by the quantity to determine the extended price for the item.

6.3.5 Updating Sales Drivers on Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Opportunity tab. Click the Sale Driver link.

Figure 6–3 Opportunity - Manage {Customer Name} Opportunity form: Opportunity tab: Sale Driver link

Opportunity - Opportunity - Manage Opps Attachments test

Opportunity Activities Sales Attachments

Detail | Qualification | **Sale Driver** | Cost | Influencer | Competitor | Cycle Step

Close

Find Select Add

Records: 1 - 1 Customize Grid

Short Description	Category	Origin	Importance	Sale Driver ID
	BUDG	User Generated	1	132

Delete

To update an existing sales driver on an opportunity:

1. Click the Find button.

The system displays a list of the sales drivers that are associated with the sales methodology that was selected when the opportunity was created. If no sales drivers appear, no sales drivers were created for the associated sales methodology.

2. Select a sales driver and then click the Select button.
3. If necessary, click the link in the Short Description field to update information associated with the sales driver.
4. When you have added all of the relevant sales drivers to the opportunity, click the Close button.

6.3.6 Adding New Sales Drivers to Opportunities

Access the Add Sale Driver form.

Figure 6–4 Add Sale Driver form

Add Sale Driver

Tools

Origin: User Generated

Category: BUDG

Description: Budget Concerns

Importance: 1

Long Description: Budget concerns are the customer's main issue.

User Response:

Origin

Review the value in this field to determine where the sales driver originated. When you add a new sales driver to an opportunity the system enters **User Generated** in this field. If a default sales driver was populated from the sales methodology, the system enters **System Generated** in this field.

Category

Enter the type of sales driver that you are creating. Examples of sales drivers include budget concerns, inventory concerns, or revenue generation. Values are stored in UDC 90CB/CA.

Importance

Enter the numeric value that corresponds to the importance of the sales driver. Enter a 1 for the most important sales drivers. Values are stored in UDC 90CB/IM.

User Response

Enter additional information regarding this sales driver. This field is used to store information that the opportunity contact provides to the sales representative.

6.3.7 Adding Influencers to Opportunities

Access the Add Influencer form.

Contact

Enter the name of the contact person that is an influencer on the current opportunity. To add an influencer to the opportunity a contact record must already exist for the person.

Sponsorship Level

Select the value that best describes how the influencer endorses the deal. For example, is this influencer an advocate, an opponent, enthusiastic, or pessimistic about the deal? Values are stored in UDC 90CB/SL.

Sponsorship Type

Select the value that best describes the role that the influencer holds with the account. For example, the influencer might be an executive or a financial employee with the associated account. Values are stored in UDC 90CB/SP.

6.3.8 Adding Costs to Opportunities

Access the Add Opportunity Cost form.

Figure 6–5 Add Opportunity Cost form
Cost For

Enter the name of the contact person for whom the cost was incurred. To enter a value in this field, the person must already be entered in the system as a contact.

Cost Type

Specify whether the cost that you are entering is a monetary expense or time spent. Values are stored in UDC 90CB/CT. The system displays fields on this form based on the type of cost you are entering.

Payment Method

Enter a code that represents how the expense was paid. Payment method codes are stored in UDC table 90CB/PM. This field is displayed only when the Cost Type is **Expense**.

Amount

Enter the total of the expenses for the opportunity. If the cost type is **Time**, enter the quantity of time. If the cost type is **Expense**, enter the monetary amount.

Currency Code

Enter the code that represents the currency associated with the amount. This field is displayed only when the cost type is **Expense**.

Time Type

Enter the type of time that was spent. This field appears only when the cost type code is **Time**.

6.3.9 Adding Competitors to Opportunities

Access the Competitor Link List form.

Figure 6–6 Competitor Link List form

Name	Address Number	Search Type	Annual Revenues	Currency Code	Number Of Employees
Baker's Enterprise	50232	D	.00	USD	0
Competitor Hange	50503	D	.00	USD	0
Ser Competitor	51994	D	.00	USD	0
Meghna Kabeekar	391231	E	.00		0
CRM Competitor 1	470999	D	1000000.00	USD	12
CRM Competitor 2	471007	D	5000000.00	USD	50
CRM Pipeline Comp West	491625	D	500000.00	USD	0
CRM Pipeline Comp East	491626	D	1000000.00	USD	0
CRM Pipeline Comp For West	491627	D	250000.00	USD	0
CRM Pipeline Comp For East	491628	D	150000.00	USD	0

Select the competitors that you want to add to the opportunity, and then click Select. The competitor must exist before you can attach it to an opportunity.

See [Managing Competitor Data](#).

6.3.10 Adding New Activities to Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Activities tab. Click the Activities link.

Figure 6–7 Opportunity - Manage {Customer Name} Opportunity form: Activities tab: Activities link

Subject	Activity Type	Task	Start Date	End Date	Complete Activity
AddQueryFilter 1	Conference Call	<input type="checkbox"/>	06/20/2004 06:00:00	06/20/2004 06:00:00	
QBE Line Query 1	Meeting	<input type="checkbox"/>	06/20/2004 12:00:00	06/20/2004 06:00:00	
Investigate Failures	Research	<input type="checkbox"/>	01/03/2005 07:00:00	01/04/2005 06:59:59	
Request Time Off	To-Do or Task	<input type="checkbox"/>	01/15/2005 07:00:00	01/16/2005 06:59:59	
Schedule Review with Boss	To-Do or Task	<input type="checkbox"/>	01/16/2005 07:00:00	01/17/2005 06:59:59	
Contact Activity 1	Meeting	<input type="checkbox"/>	01/18/2005 00:00:00	12/31/2010 23:59:59	
Lead Activity 1	Meeting	<input type="checkbox"/>	01/18/2005 00:00:00	12/31/2010 23:59:59	
Lead Activity 3	Appointment	<input type="checkbox"/>	01/18/2005 00:00:00	12/31/2010 23:59:59	
Lead Activity 2	Call	<input type="checkbox"/>	01/18/2005 00:00:00	12/31/2010 23:59:59	
Lead Activity 4	Conference Call	<input type="checkbox"/>	01/18/2005 00:00:00	12/31/2010 23:59:59	

To add a new activity to an opportunity:

1. Click the Add button.
2. On the Add Activity form, complete the steps to create a valid activity, and then click the Save and Close button.
3. The system returns you to the Activities tab and displays the new activity in the detail area of the form.

6.3.11 Attaching Action Plans to Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Activities tab. Click the Activities link.

To link an action plan to an opportunity:

1. Click the Link Action Plan button.
2. On the Action Plan Search and Select form, select the action plan that you want to associate with the opportunity, and then click Select.
3. The system returns you to the Activities tab, and displays all of the activities generated from the action plan in the detail area of the form.

6.3.12 Assigning Sales Team Members to Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Sales tab. Click the Sales Team link.

To assign sales team members to an opportunity:

1. Review the existing sales team to determine whether changes are necessary.
The system automatically assigns to the opportunity the sales team members that are actively supporting the customer, based on the system constants, at the time that the opportunity is created.
2. To add additional members to the sales team, click the Assign Sales Team button.
3. On the Sales Team Search and Select form, select the sales team members that you want to add to the opportunity, and then click Select.
4. The system returns you to the Sales tab and lists each member of the sales team in the detail area of the form.

6.3.13 Updating Sales Team Information

Access the Edit Sales Team form.

Figure 6–8 Edit Sales Team form

The screenshot shows the 'Edit Sales Team' form with the following fields and values:

- Opportunity Number: 17
- Method Change - cycle: (empty)
- Sales Person or Group: 2
- License Plates Company: (empty)
- Role: (empty)
- Revenue Percentage: 0
- Effective Date: 12/23/2011 00:00:01
- End Effective Date: 12/31/2040 00:00:01
- Owner: ☒
- Apply Commissions: ☐

Role

Enter a value that describes the role that the associated sales team member is performing on this opportunity. Values are stored in UDC H42/RT.

Revenue Percentage

Enter the percentage of the total sale for which the sales team member should receive credit. This value is informational only and does not tie into commissions.

The total of the revenue percentages for all of the members of a sales team cannot exceed 100 percent. For example, if there are two sales team members associated with the opportunity, both cannot have a revenue percentage of 60 percent, as the total would exceed 100 percent.

Owner

Select this option to specify whether the sales team member is the owner of the opportunity. There can be only one owner for each opportunity.

Apply Commissions

Select this option to specify whether the information in the F42140 table is used to calculate commissions for the sales team member. This option is enabled only if a record exists in the F42140 for the sales team member.

Also, this option determines which sales team members are carried forward when an opportunity is converted to a sales order. Only the active members who have the Apply Commissions option selected are added to the sales team of the sales order.

6.4 Creating Quotes and Sales Orders for Opportunities

This section provides an overview of quotes and sales orders as they relate to opportunities, lists prerequisites, and discusses how to:

- Edit quotes associated with opportunities.
- Edit sales orders associated with opportunities.

6.4.1 Understanding Quotes and Sales Orders

As the sales team progresses through the sales cycle with an opportunity they might need to provide quotes for products or services in which the customer is interested.

Additionally, if the sales cycle is successful, the sales representative might find it necessary to create a sales order to initiate the purchase and shipment process.

You can generate both quotes and sales orders automatically from the opportunity record. To enable the quote and sales order conversion options, you must set the processing options for the Manage Opportunities program. You can then click the Convert to Quote or Convert to Sales Order buttons to create quotes and sales orders directly from the sales opportunity.

After you create quotes or sales orders, you maintain and process those quotes and orders from the JD Edwards EnterpriseOne Sales Order Management system. You can access the Edit Sales Order form, which is used to update both sales orders and quotes, directly from the opportunity record. You can perform these actions from the Edit Sales Order form:

- Summarize the order.
- Cancel line items.
- Update header information.
- Check the customer's credit.
- Check product availability.
- Check product pricing.
- Reprice the order.
- Review pictures of items.
- Review and update commission information.
- Review price history.
- Review freight information.
- Perform a multi-item search.
- Access the Address Book.
- Submit the order for processing.
- Cancel the order.
- Configure products.

6.4.1.1 Quotes

When you convert an opportunity record to a quote, the system uses the version of the Sales Order Entry program (P42101) that you specify in the processing options of the Manage Opportunities program to create a quote document. We recommend that you use version ZJDE0003, or a copy of that version, to process sales quotes.

You can create multiple quotes for an opportunity. You can also generate proposal documents, which you can send to the customer, directly from the quote. You can also review all of the quotes associated with an opportunity.

To convert an opportunity to a quote, the opportunity must have a sales cycle step with a probability of greater than zero (0). The quote must also include at least one line item. If a product catalog was selected without an item, the item must be selected. If all of these criteria are not met, you will receive a Cannot Convert error when you click the Convert to Quote button.

When you convert an opportunity to a quote, the system carries forward all of the active sales team members whose Apply Commissions option is selected. The system

then calculates commission information, based on the commission constants that are set up for each employee in the F42140.

If the quote has at least one line with a valid item, then that line will be converted. All line items that do not contain valid items will cause the system to produce a warning that all lines cannot be converted. You may choose to ignore this warning and convert only the valid lines into a quote.

After you convert an opportunity to a quote, the system brings you to the Create New Order form, where you can add additional information to the quote, if necessary. You can create multiple quotes for an opportunity. You can also review the quotes from the opportunity forms. When an opportunity is converted to a quote, the system does not copy the media objects associated with the opportunity to the quote.

6.4.1.2 Sales Orders

When you convert an opportunity record to a sales order, the system uses the version of the Sales Order Entry program (P42101) that you specify in the processing options of the Manage Opportunities program to create a sales order. We recommend that you use version ZJDE0001, or a copy of that version, to process sales orders.

In order to convert an opportunity to a sales order, the opportunity must meet these criteria:

- The opportunity must have a probability of 100 percent.

The opportunity must include a sales cycle that has a probability of 100 percent. If you try to convert the opportunity to a sales order while you are in a sales cycle that has a probability less than 100 percent, you will receive a Cannot Convert error. You must change the sales cycle step for the opportunity to one with a probability of 100 percent to continue with the conversion.

- The opportunity must include at least one line item with an item number (product number).

The line items are used to create the sales order. When the opportunity is converted to a sales order and the product catalog has been selected, but the item has not, the user shall be prompted to select an item. If you attempt to convert an opportunity with no line items to a sales order, you will receive a Cannot Convert error. You must add line items to the opportunity to continue with the conversion.

When you convert an opportunity to a sales order, the system carries forward to the sales order all of the active sales team members whose Apply Commissions option is selected. The system then calculates commission information based on the commission constants that are set up for each sales team member in the F42140 table.

After you convert an opportunity to a sales order, the system brings you to the Create New Order form, where you can add additional information to the sales order, if necessary. You can create multiple sales orders for an opportunity. You can also review the sales orders from the opportunity forms. When an opportunity is converted to a sales order the system does not copy the media objects associated with the opportunity to the sales order.

6.4.2 Prerequisites

Before you complete the tasks in this section:

Set the processing options for the Sales Order Entry program (P42101) versions that are entered in the processing options for the Manage Opportunities program (P90CB020). You enter one version of the Sales Order Entry program to process quotes, and another to process sales orders from the Manage Opportunities program. We

recommend using version ZJDE0003 to process quotes, and ZJDE0001 to process sales orders.

You must also set up Document Type Maintenance (P40040) for Sales Quotes. If you do not set this up, the system will not convert opportunities to quotes. To set up document types for Sales Quotes, enter 2 or 3 in the Order Category field on the Sales tab of the Document Type Revisions form.

See Also:

- [Generating Sales Proposals.](#)
- "Setting Up the Inventory Management System", in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.
- "Setting Up Document Type Information", in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*
- *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

6.4.3 Forms Used to Create Quotes and Sales Orders for Opportunities

Form Name	FormID	Navigation	Usage
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Select existing opportunities.
Opportunity - Manage {Customer Name}	W90CB020A	Select a record on the Search for Opportunities form.	Convert an opportunity to a quote or a sales order.
Edit Sales Order	W42101D	Select a quote or sales order from the Opportunity - Manage {Customer Name} form, select the Sales tab, click the Sales Order or Quote link, and then click Select.	Edit a quote or sales order associated with an opportunity.

6.4.4 Editing Quotes Associated with Opportunities

Access the Opportunity - Manage {Customer Name} Opportunity form. Select the Sales tab. Click the Quote link.

Figure 6–9 Opportunity - Manage {Opportunity Name} form: Sales tab: Quote link

Opportunity - Opportunity - Manage Method Change - cycle

Query: All Records

Opportunity Activities Sales Attachments

Sales Team Quote Sales Order

Close

Find Select View Pending Order

No records found.

Order Number	Order Type	Order Type Description	Sold To Customer	Sold To Customer Name	Ship To Customer	Ship To Customer Name	Currency Code	Order Amount
--------------	------------	------------------------	------------------	-----------------------	------------------	-----------------------	---------------	--------------

Customize Grid

To review or edit the quote, click the link in the Order Number field. The system brings you to the Edit Sales Order form, where you can review and edit the quote.

6.4.5 Editing Sales Orders Associated with Opportunities

Access the Opportunity - Manage {Opportunity Name} form. Select the Sales tab. Click the Sales Order link.

Figure 6–10 Opportunity - Manage {Opportunity Name} form: Sales tab: Sales Order link

Opportunity - Opportunity - Manage Method Change - cycle

Query: All Records

Opportunity Activities Sales Attachments

Sales Team Quote Sales Order

Close

Find Select View Pending Order

No records found.

Order Number	Order Type	Order Type Description	Sold To Customer	Sold To Customer Name	Ship To Customer	Ship To Customer Name	Currency Code	Order Amount
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Customize Grid

To review or edit the quote, click the link in the Order Number field. The system brings you to the Edit Sales Order form, where you can review and edit the sales order.

Generating Sales Proposals

This chapter contains the following topics:

- [Section 7.1, "Understanding Proposal Generation"](#)
- [Section 7.2, "Creating Simple Templates"](#)
- [Section 7.3, "Creating Composite Templates"](#)
- [Section 7.4, "Managing Proposal Templates"](#)
- [Section 7.5, "Creating Proposals"](#)

7.1 Understanding Proposal Generation

You can use the proposal generation feature to produce sales proposals from quotes or sales orders. The Proposal Generation Wizard program (P90CA24) allows you to mix and match document components, which enables you to specify those components that you want to include in the generated proposal.

The system uses simple and composite templates that enable you to easily define which templates to include in the proposal and to specify the order in which the pieces appear. For example, the proposal you generate might include the address to which the order will be shipped, the requested ship date, the item details, and special delivery instructions. Each of these items might be stored in a separate template. When you generate the proposal, you can select and sequence the appropriate templates.

You can easily create templates for general or specific use. You create templates by first creating RTF documents that are used in the template. RTF documents can consist of text and images. You then create a simple template and attach the associated RTF documents.

You can also create different versions of each RTF document and attach them to a simple template. The system determines which version to use for the proposal based on the data in the associated quote or sales order and the language preference of the sold-to customer. You can create default versions along with additional versions that are based on:

- The ship to address on the quote or sales order, and the language preference that you associate with the sold to customer.
- The ship to address on the quote or sales order.
- The sold to address on the quote or sales order, and the language preference that you associate with the sold to customer.
- The sold to address on the quote or sales order.

- The branch/plant on the quote or sales order, and the language preference that you associate with the sold to customer.
- The branch/plant on the quote or sales order.
- The company on the quote or sales order, and the language preference that you associate with the sold to customer.
- The company on the quote or sales order.

After you create a proposal, the system attaches it to the associated quote or sales order as a media object, enabling you to make the proposal available online or to email the proposal.

Note: For sample templates, contact JD Edwards EnterpriseOne customer support.

7.2 Creating Simple Templates

This section provides an overview of simple templates and discusses how to:

- Create a data set.
- Create tags to insert in RTF documents.
- Create RTF documents.
- Creating a simple template header.
- Attach RTF documents to a simple template.

7.2.1 Understanding Simple Templates

Before you can generate a proposal, you must create a data set. You use data sets to group templates. For example, you might create a data set called Proposals and group all of the templates that are associated with proposals under the Proposal data set. After you create a data set, you can create simple templates by completing these steps:

1. Create tags to insert into RTF documents.

You create tags to retrieve data from the JD Edwards EnterpriseOne system. You can insert tags into RTF documents. When the system generates a proposal, the system replaces the tag with the corresponding data from the JD Edwards EnterpriseOne system.

2. Create RTF documents.

After you create tags, you can create RTF documents. These documents can contain text, images, tag titles, and tags. You can create multiple versions of the same RTF document. For example, you might create documents such as HeaderEnglish.rtf or HeaderFrench.rtf. These documents contain the same information, but are written in different languages.

3. Create a simple template.

After you create tags and RTF documents, you can create a simple template. First, for example, you create the header. Then you can attach all of the RTF documents that you want to associate with the template. For example you might create a simple template called **Header** and attach HeaderEnglish.rtf and HeaderFrench.rtf. When you finish creating the template, you must activate it so that it is available during proposal generation.

You create RTF documents using an application such as Microsoft Word that can save documents in RTF format. The RTF document can contain text, images, graphics, or links to Web sites. You can also type tag titles into the document. Lastly, you can insert tags into fields that retrieve information from the JD Edwards EnterpriseOne database when the proposal is generated. Examples of tags that you might insert into a document include the customer name and address. To insert tags into an RTF document, you must follow a specific procedure and enter only tags that are recognizable by the JD Edwards EnterpriseOne system. Tags must be inserted into the document correctly, and not typed in. If you type a tag name in the RTF document without inserting the field, the system will not retrieve JD Edwards EnterpriseOne data.

The system creates simple templates from these individual RTF documents. To be flexible, the RTF documents should not contain too much information. For example, you might want the company logo to reside in its own RTF document so you can place it anywhere in the generated proposal. If the logo is part of the company name and address, you cannot move it to another part of the generated proposal.

7.2.1.1 Tags and Tag Titles

When you create RTF documents, you can insert tags and tag titles. If you use tag titles, you must always use them in conjunction with a tag. However, it is not necessary to use tag titles. Therefore, you can insert a tag into an RTF document without associating it with a tag title, but you cannot enter a tag title into an RTF document without associating it with a tag.

Before you can insert a tag into a document, you must create the tag. After you create the tag you can insert it into an RTF document. By inserting a tag, you are specifying that you want to put actual data in place of that tag when the system generates a proposal. For example, you might want to create a template to generate a simple thank you note with some item and pricing information. The note could include company and item information. you can insert tags for each of those items into the template. Those tags pull data from the JD Edwards EnterpriseOne system during the proposal generation process.

You can also enter tag titles into the RTF document. Tag titles are used in two ways in an RTF document. To use tag titles in regular text, you type them directly into the document, follow them by a colon, and then you insert the associated tag. For example, if you want to add to the proposal header the text **Attention:** followed by the name that is associated with the quote or sales order to the header of the proposal, you would type **TTShipToAttention:** into the RTF document, and insert the tag SOHShipToAttention directly after the colon. An alternative to using tag titles in this way is to simply type the text that you want to appear in the RTF document. For example, you can type **Attention:** and then insert the tag SOHShipToAttention directly after the colon.

Tag titles are also used when inserting sales order detail into a document. To insert sales order detail, you must create a table, and use tag titles as the column headings. When you create this table, you must include the tag titles in the same order in which they appear in this example, and you do not need to follow the tag titles with a colon and a tag. Specifications for creating this table are included later in this chapter.

This is an example of what an RTF document might look like:

Figure 7-1 Example RTF document

Sold To:	Ship To:
ABMSoldToName Alpha	ABMShipToName Alpha
SoldToAddressLine1	ShipToAddressLine1
SoldToAddressLine2	ShipToAddressLine2
SoldToAddressLine3	ShipToAddressLine3
SoldToCity1, SoldToState SoldToZipcode	ShipToCity1, ShipToState ShipToZipcode

Quote Date: Month/Day/Year

Quote Number: SOHDocumentOrderInvoice

Reference Number: SOHReference1

TTItem	TTDescription	TTQuantity	TTUOM	TTUnitPrice	TTExtendedAmount
@@@					

Total Amount: SOHAmountOrderGross

This is an example of a proposal that is generated using the previous RTF document:

Figure 7-2 Example proposal

Sold To:	Ship To:
Global Corp.	Global Corp.
123 Main St.	123 Main St.
Suite 3500	Suite 3500
Denver, CO 80237	Denver, CO 80237

Quote Date: 07/16/2008

Quote Number: 2485

Reference Number: 16542

Item	Description	Quantity	Unit of Meas	UnitPrice	ExtendedAmount
2340	Paper	20	Case	100.00	2000.00
2350	Staples	5	Case	25.00	125.00
2385	File Folders	10	Case	85.00	850.00
2475	Copy Machine	2	Each	1500.00	3000.00

Total Amount: 5975.00

Notice that the tags have been replaced by actual data from an existing sales order. Also notice that the tag titles have been replaced by standard text.

7.2.1.2 List of Available Tags

This table lists the general tags that you can insert into a template:

General Tag Name	Description
Quote	Inserts the Key Company and the date.
Month	Inserts the month in two-digit format.
Day	Inserts the day in two-digit format.
Year	Inserts the year in four-digit format.

This table lists the tags that you can insert from the Sales Order Header table:

Sales Order Header (F4201) Tags	
SOHCompanyKeyOrderNumber	SOHPrintMessage1
SOHDocumentOrderInvoice	SOHAmountOrderGross
SOHOrderType	SOHAmountTotalCost
SOHCompany	SOHAuthorizationNoCredit
SOHAddressNumber	SOHAcctNoCrBank
SOHAddressNumberShipTo	SOHDateExpired
SOHAddressNumberParent	SOHDateRequestedShip
SOHDateRequestedJulian	SOHCostCenter
SOHDateTransactionJulian	SOHCompanyKeyOriginal
SOHDateOriginalPromised	SOHOriginalPoSoNumber
SOHActualShipDate	SOHOriginalOrderType
SOHCancelDate	SOHTaxArea1
SOHDatePriceEffectiveDate	SOHTaxExplanationCode1
SOHDatePromisedShipJulian	SOHHoldOrdersCode
SOHReference1	SOHCurrencyMode
SOHReference2Vendor	SOHCurrencyCodeFrom
SOHDeliveryInstruction1	SOHAmountForeignOpen
SOHDeliveryInstruction2	

You can also include information from the Sales Order Detail table (F4211). However, you insert detail information into your RTF document in a slightly different way. To display sales order detail information in your proposal, you must create a six-column table in the RTF document. You enter tag titles in the first row of the table. In the second row of the table, enter @@@@. The system automatically includes the information from the F4211 when the proposal is generated. This table illustrates the table that you enter in an RTF document to include sales order detail information in a proposal:

TTItem	TTDescription	TTQuantity	TTUOM	TTUnitPrice	TTExtendedAmount
@@@@					

Note: Item, description, quantity, unit of measure, unit price and extended amount are the only pieces of sales order detail data that you can include in a proposal.

This table lists the tags that you can insert from the Order Address Information table (F4006):

Order Address Information (F4006) Tags	
DocumentOrderInvoiceE	SoldToState
OrderType	SoldToCountry
CompanyKeyNo	ShipToNameMailing
TypeAddressNumber	ShipToAddressLine1
NameMailing	ShipToAddressLine2
SoldToNameMailing	ShipToAddressLine3
SoldToAddressLine1	ShipToAddressLine4
SoldToAddressLine2	ShipToZipcode
SoldToAddressLine3	ShipToCity1
SoldToAddressLine4	ShipToCountyAddress
SoldToZipcode	ShipToState
SoldToCity1	ShipToCountry
SoldToCountyAddress	

This table lists the tags that you can insert from the Currency Code and Address Book Master tables:

Currency Code (F0013) Tags	Address Book Master (F0101) Tags
CCDescription	ABMTaxId
CCEditCode	ABMNameAlpha

This table lists the tags that you can insert from the Business Unit Master table:

Business Unit Master (F006) Tags	
BUMCostCenter	BUMInvstmtSummurizaMeth
BUMCostCenterType	BUMGLBankAccount
BUMDescriptionCompressed	BUMDatePlannedStartJ
BUMCompany	BUMDateActualStartJ
BUMAddressNumber	BUMDatePlannedCompleteJ
BUMAddressNumberJobAr	BUMDateActualCompleteJ
BUMCounty	BUMDateOther5J
BUMState	BUMDateOther6J
BUMTaxArea	BUMDteFinalPaymntJulian

Business Unit Master (F006) Tags

BUMTaxEntity	BUMAmtCostAtCompletion
BUMTaxArea1	BUMAmtProfitAtCompletion
BUMAllocaSummurizaMeth	

7.2.1.3 List of Available Tag Titles

These tag titles are available for insertion in an RTF document:

- TTBranchPlant
- TTCancelledDate
- TTCurrencyCode
- TTDescription
- TTExtendedAmount
- TTExtendedPrice
- TTItem
- TTItemDescription
- TTLLineItemTotal
- TTLineType
- TTUOM
- TTPurchaseOrder
- TTQuantity
- TTRequestedDate
- TTShipTo
- TTShipToAttention
- TTShipToContact
- TTSoldTo
- TTSoldToAttention
- TTType
- TTUnitPrice
- Unit of measure

7.2.1.4 Creating Multiple Versions of RTF Documents

You might want to create documents that differ slightly based on the customer for whom the proposal is generated, or the company or branch/plant from which the proposal is generated. For example, you might want to create a proposal in English for all customers whose language preference is English, and create the same proposal in French for all customers whose language preference is French. You can create multiple versions of the same RTF document and attach them to a simple template to create the same proposal in different languages.

When you attach RTF documents to a simple template, you enter key types and key values to differentiate the documents. Key type codes, which are stored in user-defined code (UDC) table 90CA/AK, include:

- BR: Branch/Plant
- CO: Company
- DF: Default
- HT: Ship To
- ST: Sold To

Note: We recommend that you do not change the values in UDC 90CA/AK. Changing these values could result in the creation of incomplete proposals or errors during proposal generation.

After you assign the key type, you must also assign the key value. For example, if you enter **CO** as the key type, you must enter a valid company number as the key value. When the system generates a proposal, it compares the data on the associated quote or sales order to the key values in the available RTF documents. If the system finds a match, it uses the RTF document that is associated with that key value to generate the proposal. If you enter key type **DF**, the system automatically populates the key value with **Default**. The system uses this default template if no matching keys are found.

You can also associate a language preference with each RTF document. Language preferences enable you to produce the same proposal in different languages. If the sold to customer record does not include a language preference, the system selects the template that also has a blank language preference. If the sold to customer's language preference is blank and no templates exist with a blank language preference, then the system does not select a template and instead generates an incomplete proposal. We recommend that you set up default templates to ensure that the system creates complete templates when the language preference is not specified for a sold to customer.

The key value, language preference, and data on the associated quote or sales order determines which version of an RTF document to use when generating a proposal. The system searches for RTF documents whose Key Value field matches the data on the associated quote or sales order. The system searches for RTF documents in this hierarchical order:

1. Ship to customer with language preference.

If an RTF document exists with Key Type **HT**, a key value that is equal to the ship to customer's address book number, and language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

2. Ship to customer.

If an RTF document exists with Key Type **HT**, a key value that is equal to the ship to customer's address book number, and no language preference, the system uses that RTF document. If no match is found, the system continues searching.

3. Sold to customer with language preference.

If an RTF document exists with Key Type **ST**, a key value that is equal to the sold to customer's address book number, and language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

4. Sold to customer.

If an RTF document exists with Key Type **ST**, a key value that is equal to the sold to customer's address book number, and no language preference, the system uses that RTF document. If no match is found, the system continues searching.

5. Branch/plant with language preference.

If an RTF document exists with Key Type **BR**, a key value that is equal to the Branch/Plant field value from the quote or sales order, and a language preference that matches the sold to customer's language preference, then the system uses that RTF document. If no match is found, the system continues searching.

6. Branch/plant.

If an RTF document exists with Key Type **BR**, a key value that is equal to the Branch/Plant field value from the quote or sales order, and no language preference, then the system uses that RTF document. If no match is found, the system continues searching.

7. Company with language preference.

If an RTF document exists with Key Type **CO**, a key value that is equal to the Company field value from the quote or sales order, and language preference that matches the sold to customer's language preference, then the system uses that RTF document. If no match is found, the system continues searching.

8. Company.

If an RTF document exists with Key Type **CO**, a key value that is equal to the Company field value from the quote or sales order, and no language preference, then the system uses that RTF document. If no match is found, the system continues searching.

9. Default with language preference.

If an RTF document exists with Key Type **DF** and a language preference that matches the sold to customer's language preference, then the system uses that RTF document. If no match is found, the system continues searching.

10. Default.

If no other match is found, the system uses the RTF document with Key Type **DF** and no language preference. Each simple template should include a default RTF document with no defined language preference.

Note: Each simple template should contain one default RTF document with no language preference. Creating a default RTF document enables the system to generate a proposal for all quotes and sales orders, regardless of company, branch/plant, sold or ship to address, or language preference.

This table lists examples of RTF documents that you might attach to a simple template:

Key Type	Key Value	Language Preference	RTF Document
DF (Default)	Default	Blank	Default.rtf
CO (Company)	00001	Blank	CO00001.rtf
CO (Company)	00001	F (French)	CO00001F.rtf
CO (Company)	00001	S (Spanish)	CO00001S.rtf

Key Type	Key Value	Language Preference	RTF Document
ST (Sold To)	12345	Blank	ST12345.rtf

Using the data in the previous table, these examples illustrate how the system selects RTF documents to generate proposals:

- You generate a proposal for a quote order for which the sold to customer is 12345.
The system uses ST12345.rtf to generate this proposal.
- You generate a proposal for a sales order for which the sold to customer is 11111, the language preference of customer 11111 is F (French), and the company that is associated with the order is 00001.
The system uses CO00001F.rtf to generate this proposal.
- You generate a proposal for a sales order for which the sold to customer is 11111, the language preference of customer 11111 is F (French), and the company that is associated with the order is 00050.
The system uses Default.rtf to generate this proposal.

Note: You also use data sets and simple templates to create mail merges, envelopes, and labels.

Note (Release 9.1 Update): The Mail Merge feature has been deprecated as part of bug 28911500.

See "Using Email and Mail Merge" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

7.2.2 Forms Used to Create Simple Templates

Form Name	FormID	Navigation	Usage
Proposal Generation Setup	W90CA242B	Sales Force Automation Setup menu (G90CA03), Proposal Generation Setup	Access forms to add data sets, simple templates, and composite templates.
Search For Data Sets	W980040E	Click the Step 1 - Data Set Administration button on the Proposal Generation Setup form.	Search for existing data sets, or access forms to add new data sets.
Add Data Set Header	W980040D	Click Add on the Search For Data Sets form.	Add a new data set.
Search for Proposal Generation Simple Templates	W90CA242A	Click the Step 2 - Simple Template Administration button on the Proposal Generation Setup form.	Access forms to add, modify, or delete simple templates. Additionally, you can activate or deactivate a template using the Change Status Row menu option.

Form Name	FormID	Navigation	Usage
Add Proposal Generation Simple Template	W90CA242D	Click Add on the Search for Proposal Generation Simple Template form.	Add a new simple template.
Manage Simple Template - {Template Description}	W90CA242D	Click Save and Continue on the Add Simple Template form, or select a simple template from the Search for Proposal Generation Simple Templates form.	Attach RTF documents to a simple template.

7.2.3 Creating a Data Set

Access the Add Data Set Header form.

Data Set Name

Enter the name of the data structure template.

Description

Enter a description of the data set.

Product Code

Enter the product that is associated with the data set.

7.2.4 Creating Tags to Insert in RTF Documents

Launch Microsoft Word or any other application that allows you to save documents in RTF format. (For the remainder of these instructions, Microsoft Word 2003 is used as an example.)

1. Open a new document in Microsoft Word.
2. Select Properties from the File menu and click the Custom tab.
3. Enter a name for the tag name in the Tag field.

The name should reflect the value of the tag that will be inserted into the RTF document. For example, enter **Company Name** if you want the company name to appear in the rtf document. This is not the Tag Title. You can name the tag anything that you want, but we recommend that it is descriptive of the tag title.

4. In the Type field, select **Text**.
5. In the Value field, enter the tag title exactly as it appears in the tables that appear earlier in this documentation.

For example, enter **SOHCompany** for company name.

6. Click Add to save the tag.
7. Repeat the process for each tag that you want to use.
8. When you are finished adding tags, click OK.

7.2.5 Creating RTF Documents

Launch Microsoft Word or any other application that lets you save documents in RTF format. (For the remainder of these instructions, Microsoft Word is used as an example.)

1. Open a new Microsoft Word document.

2. Enter or insert text, graphic files, URLs, Web site links, or any other content that can be imported into the Microsoft Word file.
3. If desired, type in a tag title followed by a colon (:).
 Tag titles are always used in conjunction with tag names. For example, if you want to enter the tag title for purchase order, type in **TTSoldTo:** and insert a space after the colon. Then, proceed to the next step to insert the associated tag.
4. Place the cursor where you want to insert a tag and select Field from the Insert menu.
5. In the Field Names field, select **DocProperty** to display a list of available tags.
 The tags that you previously created should be available in the Property list.
6. Select the tag that you want to insert from the Property list.
 For example, to insert the tag associated with tag title **TTSoldTo:**, select **ABMSoldToNameAlpha**. Using this example, when you generate your proposal, the proposal would include the text *Sold To: ABC Corporation*, assuming that ABC Corporation is the name listed in the Address Book Master table for the customer associated with the quote or sales order.
7. Click OK.
8. Repeat steps 3 through 6 to insert additional tags in the RTF document.
9. Save the document, making sure to assign a name that will help you identify the file contents when you create templates.
 Also, be sure to save the document using the .rtf file type.
10. Note the location where the document resides, as you will need this information later in the process.

You can insert general tags that retrieve the quote number or date. You can also insert tag names that retrieve values from specific JD Edwards EnterpriseOne fields or tag titles that are used in conjunction with a tag name. When you insert a tag title and tag name combination in an RTF document, the tag title is a label for the field. For example, if you insert the tag title **TTType** and the tag name **SOHOrderType**, then the generated proposal contains "Type: A."

When you use tag titles with tag names, use the format tag title:tag name (for example, **TTType:SOHOrderType**). In this example, you type **TTType:** directly into the document and insert field **SOHOrderType**.

7.2.6 Creating a Simple Template Header

Access the Add Proposal Generation Simple Template form.

Template ID

Enter the template name or identifier.

Description

Enter a name or brief description of the template contents. For example, if you are creating a simple template that contains header information that can be used for any proposal, enter **Generic Header**.

Product Code

Enter the product that is associated with the template. This field is informational only and does not control any data processing. You can use this field to group templates.

Data Set Name

Enter the data set that is used by the template. You use data sets to group templates.

Template Type

Review the value in this field. The system automatically populates this value using the data in the processing options. If you are creating proposal generation templates, the system enters **PG** in this field. Values are:

PG: Proposal Generation

DG: Document Generation

EN: Envelopes

MM: Mail Merge

Note (Release 9.1 Update): The Mail Merge feature has been deprecated as part of bug 28911500.

Task Status

Review this field to determine whether the template is active. Only active templates are available during proposal generation. Values are:

- **AV:** Available
- **IN:** Inactive

7.2.7 Attaching RTF Documents to a Simple Template

Access the Manage Simple Template - {Template Name} form.

1. Complete the Key Type field to specify what data the system uses to determine whether to use the RTF document.

For example, if you want to use this RTF document for proposals that are generated by Company 00001, enter **CO** in this field and enter **00001** in the Key Value field.

Values include:

- **BR:** Branch/Plant
- **CO:** Company
- **DF:** Default
- **HT:** Ship To
- **ST:** Sold To

2. Complete the Key Value field with a value that is associated with the key type.

For example, if you entered **CO** in the Key Type field, enter a valid company number in this field. The system uses the RTF document that you associate with this record only when generating proposals for quotes or sales orders that have this company number in the Company field.

If you enter **HT** in the Key Type field, enter a valid ship to customer number. The system uses the RTF document that you associate with this record only when generating proposals for quotes or sales orders that include this customer number in the Ship To field.

If you enter **DF** in the Key Type field, the system automatically populates this field with **Default**.

3. To specify that the system use the RTF document that you associate with this record only for proposals whose sold to customer has a specific language preference, complete the Language field.
To disregard language preference for this RTF document, leave the Language field blank.
4. Click the Choose Template button and navigate to and select the RTF document that you want to attach to the template.
5. To attach additional RTF documents, complete steps 1 through 4.
6. Click Save and Close to return to the Work With Simple Header Templates form.
7. On the Work With Simple Header Templates form, select the template that you just created and then select Change Status from the Row menu to make the template active.

7.3 Creating Composite Templates

This section provides an overview of composite templates and discusses how to create a composite template.

7.3.1 Understanding Composite Templates

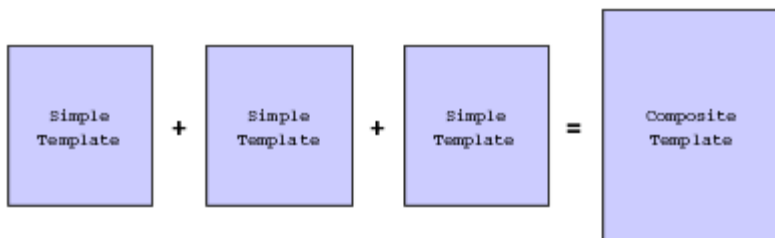
After you create data sets, RTF documents and simple templates, you can create composite templates. A composite template is a group of simple templates that the system uses together to generate a proposal.

These equations illustrate simple and composite templates:

- Data Set + RTF Documents = Simple Template
- Simple Template + Simple Template + Simple Template = Composite Template

This diagram illustrates the creation of a composite template:

Figure 7-3 Composite template creation



You use simple templates to store small pieces of reusable information. For example, an organization sells bicycles and motorcycles. Though the proposals that you create for bicycles and motorcycles are similar, there are slight differences. To avoid recreating data that you can reuse, you can create simple templates to store generic information such as logos, headers and closings. You might create these simple templates:

- Company Logo
- Generic Header
- Generic Closing
- Bicycle Proposal Body
- Motorcycle Proposal Body

You can then use these simple templates in multiple composite templates. This table lists how you can reuse simple templates in multiple composite templates:

Composite Template	Simple Templates
Bicycle Sales Proposal	<p>This composite template includes these simple templates:</p> <ul style="list-style-type: none"> ■ Company Logo ■ Generic Header ■ Bicycle Proposal Body ■ Generic Closing
Motorcycle Sales Proposal	<p>This composite template includes these simple templates:</p> <ul style="list-style-type: none"> ■ Company Logo ■ Generic Header ■ Motorcycle Proposal Body ■ Generic Closing

After you create a composite template and change its status to Active, the system includes the template in the list of available templates the next time that you launch the Proposal Generation wizard.

7.3.2 Forms Used To Create Composite Templates

Form Name	FormID	Navigation	Usage
Proposal Generation Setup	W90CA242B	Sales Force Automation Setup menu (G90CA03), Proposal Generation Setup	Access forms to add data sets, simple templates, and composite templates.
Search For Composite Templates	W980040G	Click the Step 3 - Composite Template Administration button on the Proposal Generation Setup form.	Add, modify, or delete composite templates.
Add Composite Template Header	W980040F	Click Add on the Search For Composite Templates form.	Add a composite template.
Composite Template - Manage {Composite Template Name}	W980040F	Select a record on the Search For Composite Templates form, or click Save and Continue on the Add Composite Template Header form.	View or modify a composite template.

Form Name	FormID	Navigation	Usage
Composite Template Details - {Composite Template Name}	W980040T	Select a record on the Search For Composite Templates form, and then select View Details from the Row menu.	Attach simple templates to a composite template.
Copy Mail Merge Composite Template	W980040F	Select a record on the Search For Composite Templates form, and then click Copy.	Copy a composite template.

Note (Release 9.1 Update): The Mail Merge feature has been deprecated as part of bug 28911500.

7.3.3 Creating a Composite Template

Access the Add Composite Template Header form.

1. Enter template information and then click OK.
2. On the Work With Composite Template Headers form, select the template that you just created and then select View Details from the Row menu.
3. On the Work With Composite Template Details form, click the visual assist at the Template ID field to display the Simple Template Search and Select form.
4. Find and select the simple template you want to include in the composite template.
5. Repeat steps 3 and 4 to add additional simple templates to the composite template.
6. On the Work With Composite Template Details form, enter sequence numbers for each of the simple templates that you selected for the composite template.
7. When you are finished creating the template, click OK to exit the Work With Composite Template Details form.
8. On the Work With Composite Template Headers form, select Change Status from the Row menu to make the template active.

Composite Template Name

Enter a name for the composite template.

Description

Enter a brief description of the template contents.

Product Code

Enter the product that is associated with the template. Product code does not affect data processing. You use product codes to group templates.

7.4 Managing Proposal Templates

This section provides an overview of template management and discusses how to:

- Copy a simple or composite template.
- Modify or delete a simple template.
- Modify or delete a composite template.

Important (Release 9.1 Update): The Mail Merge feature has been deprecated as part of bug 28911500.

7.4.1 Understanding Template Management

Although you have the option to modify or delete simple templates, keep in mind that modifying or deleting affects all composite templates that use those simple templates. For example, if you delete a simple template with a product image, the image will be unavailable in all composite templates that formerly included that image.

Similarly, if you modify a composite template, the change will affect all users of that template. Make sure that the modifications you want to make will not adversely affect other users of the template. If so, you can leave the composite template unmodified and instead create a new template that contains the modifications you have in mind.

You should also exercise caution when deleting a simple or composite template, because a deleted template becomes unavailable to all users.

If an existing composite template is reasonably close to the template that you want to create or contains a majority of the simple templates you plan to use, it might be easier to copy an existing template, rename it, and modify it rather than creating a new template from scratch. For example, you might have a detailed proposal template that you could use as the basis for creating a summary template.

To modify or delete a template, use the same forms used to create simple or composite templates.

Note: You use the Mail Merge and Doc Generation Maintenance Application program (P980040) to access templates that are used for mail merge and proposal generation. To process mail merge data successfully, you must create a version named **NA**. If you do not create this version, the system does not process mail merge information correctly.

7.4.2 Forms Used to Manage Templates

Form Name	FormID	Navigation	Usage
Mail Merge & Document Generation Administration	W980040O	Enter P980040 in the Fast Path field.	Access simple and composite templates.
Work With Composite Template Headers	W980040G	Click Composite Template Administration on the Mail Merge & Document Generation Administration form.	Copy or modify composite templates.
Work With Simple Template Headers	W980040C	Click Data Set Administration on the Mail Merge & Document Generation Administration form.	Copy or modify simple templates.

7.4.3 Copying a Simple or Composite Template

Access the Work with Simple Template Headers or Work with Composite Template Headers form.

1. Find and select on the grid the template you want to copy.
Do not click the Select button.
2. Click Copy.
3. If you are copying a simple template, enter the template ID and template version for the new template that you are creating on the Copy Mail Merge Simple Template form.

If you are copying a composite template, enter the composite template name, description, and product code for the new template that you are creating on the Copy Mail Merge Simple Template form.
4. Click OK when you are finished copying the template.

7.4.4 Modifying or Deleting a Simple Template

Access the Work with Simple Template Headers form.

1. On the grid, find and select the template that you want to modify.
Do not click the Select button.
2. Use the form grid to change the template ID, description, creator, product code, data set name, template type, or task status.

You can also change the status by selecting Change Status from the Row menu.
3. To delete the template, select the template that you want to delete, and then click Delete.
4. Click Close when you are finished modifying or deleting simple templates.

7.4.5 Modifying or Deleting a Composite Template

Access the Work With Composite Template Headers form.

1. On the grid, find and select the template that you want to modify.
Do not click the Select button.
2. To add, remove, or reorder parts, select View Details from the Row menu to display the Work With Composite Template Details form.
3. Select on the grid any parts that you want to delete, and then click the Delete button.
4. To add a part, select a blank line on the grid and then click the visual assist button at the Template ID field.
5. On the Simple Template Search and Select form, find and select the part you want to add.
6. Enter the sequence number of the new part.

Repeat the previous steps to add additional parts.
7. If desired, arrange the sequence of any parts.
8. When you are finished modifying the composite templates, click OK to exit from the Work With Composite Template Details form.
9. To delete a composite template, find and select the template that you want to delete on the Work With Composite Template Headers form.
10. Click Delete, and then confirm the deletion.

11. When you are finished modifying and deleting composite templates, click Close to exit from the Work With Composite Template Headers form.

7.5 Creating Proposals

This section provides an overview of proposal creation and discusses how to run the Proposal Generation Wizard.

7.5.1 Understanding Proposal Creation

The Proposal Generation feature uses a wizard that guides you through the process of creating the proposal. After you have provided enough information for the system to create the proposal, you can associate the proposal with a sales order.

Complete these steps to generate a proposal:

1. Select the composite template.
2. Select the simple templates of the composite template to include in the generated proposal.

You can include some or all of the available simple templates.

3. Change the sequence of the simple templates, if necessary.

To include a simple template on a different area of the generated document, you can easily change the sequence of the simple template.

4. Preview the generated proposal in PDF format.

The proposal will look exactly like this when you generate it in the system. You can use any available functionality of Adobe Reader when viewing the PDF file.

5. Confirm that you want to associate the generated proposal with the current sales order.

When you click Finish, the system stores the proposal as a media object. If you click Cancel, the system does not save the proposal.

Generated proposals are saved as media object attachments for quotes or sales orders, so you can view or print them later.

To generate a proposal, you must first select a quote or sales order. You access the Proposal Generation wizard from the Sales Order - Manage Existing Order form. This form is accessible from either of these Sales Order Entry programs:

- P4210
- P42101

See Also:

- "Entering Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.
- "Entering Additional Orders," in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.
- "Entering Quote Orders", in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

7.5.2 Forms Used to Create a Proposal

Form Name	FormID	Navigation	Usage
Sales Order - Manage Existing Order	W42101C	Daily Sales Force Automation Processing (G90CA01), Sales Order	Access the Proposal Generation wizard.
Quote Order - Manage Existing Order	W42101C	Daily Sales Force Automation Processing (G90CA01), Quote Order	Access the Proposal Generation wizard.
Proposal Generation Wizard	W90CA24B	On the Sales Order - Manage Existing Order or Quote Order - Manage Existing Order form, select a record and then select Order, Generate Proposal from the Row menu.	Run the Proposal Generation wizard.

7.5.3 Running the Proposal Generation Wizard

Access the Sales Order Management - Manage Existing Order form.

1. Find and select the sales order for which you want to generate the proposal.
2. Select Generate Proposal from the Row menu to launch the Proposal Generation wizard.
3. Find and select the composite template to generate the proposal.
The system displays only active composite templates.
4. Click Next to continue.
5. For each simple template to include on the proposal, click Enabled and specify the sequence number.
6. Click Next to generate and preview the document.
7. When the generated document appears in PDF format, click Finish to complete the proposal generation process.

When you click Finish, the system saves the PDF. If you click Cancel, the system does not save the PDF.

To make changes before finalizing the process, click Previous to return to the appropriate screen.

You can view the generated proposal from the Manage Existing Order form by selecting Order, Header Attachments from the Row menu.

Managing Sales Data

This chapter contains the following topics:

- [Section 8.1, "Understanding Sales Data"](#)
- [Section 8.2, "Managing Competitor Data"](#)
- [Section 8.3, "Forecasting Sales Revenue"](#)
- [Section 8.4, "Reviewing Sales Pipelines"](#)

8.1 Understanding Sales Data

To be successful, a sales organization must have a comprehensive understanding of the outside forces that contribute to a customer's decision to do business with you. One of the strongest outside forces that can affect a sale is direct competition. If you understand what competitors can deliver, when they can deliver it, and for what price, you can compete effectively.

In addition to understanding the competition, you must also have a complete understating of your own organization, the amount of potential revenue that can be realized in the future, and the amount of demand that exists for your products in the marketplace. Using sales forecasts and sales pipelines, you can determine, with reasonable certainty, the amount of revenue that the organization will generate in the near future. You can also use this information to assist in demand forecasting for products, which enables you to better plan materials and inventory.

8.2 Managing Competitor Data

This section provides an overview of competitor data and discusses how to:

- Add a new competitor.
- Enter contact information for a competitor.
- Attach product information to a competitor.
- Add competitor opportunities.
- Set processing options for the Competitor Find Browse program (P90CA061).
- Set processing options for the Competitor Detail program (P90CA060).

8.2.1 Understanding Competitors

To effectively sell products and services, you must be able to demonstrate to potential customers why an organization's products and services are better than those of

competing organizations. To accurately compare an organization against the competition, you must have an understanding of the products and services the competitors provide, their pricing structure, and their business processes.

Using the Competitor Find Browse program (P90CA061) and the Competitor Detail program (P90CA060), you can track information about competitors. You can attach products to competitor records, and enter information about those products, such as the competitor's price, shipment policies, special product features, or known defects and issues. When you enter a competitor into the system, these tables are updated:

- F90CA060
- F0101
- F0111
- F0116
- F0115
- F01161
- F01151
- F90CA06A

You can also associate a competitor with sales opportunities with which they might be involved. This enables the sales representatives to know who they are competing against when working on a sale. You can then view the pipeline for the competitor. The pipeline gives you an at-a-glance view of the potential revenue that is associated with the sales opportunities in which the organization is competing with a specific competitor.

Lastly, you can use category codes to enter and track information that is specific to the organization's needs. Because the type of competitor information that an organization might want to track varies greatly, we provide you with thirty user-defined category codes that you can configure to track information that is specific to the organization, and the competition. For example, you might want to track how long the competitor has been in business, whether the competitor attended specified marketing events, or if there are internal employees who have worked for the competitor. You can use category codes to track all of this information.

Important: In previous releases of the JD Edwards EnterpriseOne Sales Force Automation system, competitor data was managed using the P6917901 program. As of release 8.11 SP1, you use the Competitor Find Browse program (P90CA061) and the Competitor Detail program (P90CA060) to manage competitor data.

Note: Be aware that category codes are used throughout the JD Edwards EnterpriseOne system. Therefore, you should work with a system administrator when configuring category code fields to determine which category codes are available for use.

8.2.1.1 Competitor Products

To fully understand the competition, you must know what they are selling, and what advantages or disadvantages they have when compared to your organization. To track this information, you can attach products to a competitor record, and you can add competitor-specific information to each product.

If your organization sells the same item, or a comparable item, you can attach your organization's item to the competitor record. This enables you to directly compare the competitor's products with the products in your organization that might best compete with the competitor's product.

For example, if your organization sells Widget A, and a competing organization also sells Widget A, you set up Widget A in the system once. You enter your organization's pricing information when you set up the item. You can then attach Widget A to the competitor record, and enter information that is specific to the competitor, such as the pricing the competitor is using when selling the item. Competitor-related item information is stored in the F90CA06A table, and does not affect the setup of the item for your organization.

You enter competitor-specific information about products using the Competitor Item Description and Extended Description fields. These fields are free-form text fields that you can use to hold any alphanumeric data about the competitor's products. Before you can attach a product to a competitor record, you must first create a product item.

8.2.1.2 Opportunities and Pipeline

Typically, sales representatives find themselves competing against other organizations to win a customer's business. Knowing the competition can be the biggest asset when it comes to closing a sale. If you find that a competitor organization is involved in a sales opportunity, you can associate the competitor with the opportunity.

By associating competitors with opportunity records, you provide sales team members with any easy way to determine which organizations they are competing against. The sales representatives can then look at any product or category code information that might assist them in gaining a competitive edge during the sales cycle. Besides knowing the customer, knowing the competition can be the single most important piece of information when trying to win a sale.

To associate a competitor with an existing opportunity, you access the opportunity record and attach the competitor to the opportunity. At times, you might want to create a new opportunity for a competitor. For example, you might find that one of your customers is working with a competitor organization to purchase products. Now that you are aware that the customer is in the market for the specified product, you might decide to contact them and try and sell them your product. You can create a new opportunity directly from the competitor record. You can then use this opportunity record to track all related sales information.

If you have associated competitors with existing opportunities, or you have added new opportunities to the competitor, you can view the competitor's pipeline. The pipeline displays, at a glance, the amount of potential revenue that the competitor can realize, or that your organization can lose, if the competitor wins the sales. Viewing the competitor's pipeline can also help an organization determine how strong the competition is in the marketplace.

See Also:

- [Managing Sales Opportunities.](#)
- "Managing Items and Item Catalogs for CRM, Prerequisites" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide.*

8.2.2 Forms Used to Manage Competitor Data

Form Name	FormID	Navigation	Usage
Search for Competitors	W90CA061A	Periodic Sales Force Automation Processing (G90CA02), Competitor	Select existing competitors or access forms to add new competitors.
Add Competitor	W90CA060B	Click Add on the Search for Competitors form.	Add a new competitor.
Manage {Competitor Name}	W90CA060A	Select a competitor on the Search for Competitors form.	Review and maintain competitor information.
Add Opportunity	W90CB020C	Click the Opportunity link on the Manage {Competitor Name} form, Sales tab, and then click the Add button.	Add a competitor opportunity.

8.2.3 Adding a New Competitor

Access the Add Competitor form.

Figure 8–1 Add Competitor form

The screenshot shows the 'Competitor - Add Competitor' form. At the top, there are four buttons: 'Save and Close', 'Save and Continue', 'Save and Add New', and 'Cancel'. Below these are several input fields: 'Address Number' (empty), 'Name *' (Office Supply Outlet), 'Annual Revenue' (\$00000.00), 'Number Of Employees' (25), 'Search Type *' (D), 'Currency Code' (USD), and 'US Dollars'. A section titled 'Primary Address' contains four lines for address input: 'Address Line 1' (300 Lake Street), 'Address Line 2' (empty), 'Address Line 3' (empty), and 'Address Line 4' (empty). Below these are fields for 'City' (Boston), 'State' (MA), 'Postal Code' (02101), 'Country' (United States), and a 'Country' dropdown menu.

8.2.4 Entering Contact Information for a Competitor

Access the Manage {Competitor Name} form. Select the Competitor tab. Click the Addresses/Phones link.

Figure 8–2 Manage {Competitor Name} form: Competitor tab: Addresses/Phones link (1 of 2)

Competitor - Competitor - Manage Baker's Enterprise

CompetitorSalesAttachments

DetailAddresses/PhonesProducts

Save ChangesUndo ChangesClose

Primary Address

Address Number

00202

Address Line 1

200 Lake Street

Address Line 2

Address Line 3

Address Line 4

City

Boston

State


MA

Massachusetts

Postal Code

02301

Country

 United States

County

Figure 8–3 Manage {Competitor Name} form: Competitor tab: Addresses/Phones link (2 of 2)

Alternate Address

Records 1 - 1

	Begin Date	Address Type	Address Description	Address Line 1	Address Line 2
<input type="checkbox"/>					

Phone and Fax

Records 1 - 1

	Phone Type	Phone Description	Phone Prefix	Phone Number	Line Number
<input type="checkbox"/>					

Electronic Address

Records 1 - 1

	Rev. Address	Electronic Address Type	Electronic Address Description	Electronic Address	Line Number
<input type="checkbox"/>	<input type="checkbox"/>				

8.2.5 Attaching Product Information to a Competitor

Access the Manage {Competitor Name} form. Select the Competitor tab. Click the Product link.

Figure 8–4 Manage {Competitor Name} form: Competitor tab: Products link

Competitor - Competitor - Manage Baker's Enterprise

Query: All Records

Competitor Sales Attachments

Data | Addresses/Phone | **Products**

Save Changes Undo Changes Close

Records 1 - 1

Seq No	Short Item No	Description	Competitor Item Description	Extended Description	2nd Item Number
30	30			Click for extended description	

Delete

Competitor Item Description

Enter a brief description of the most important competitor-related information. The system displays text that you enter in this field on the Competitor tab of the Competitor - Manage {Competitor Name} form when you click the Product link. This description should give the sales representative the most important piece of information that they will need when trying to compete against this organization. For example, if you are aware that the competitor's product has a defect, you might enter **DEFECT - handle breaks often** in this field. Alternatively, you might want to display the competitor's price so the sales representative knows, at a glance, whether they can beat the competitor's price. The information that you enter in this field is stored in the F90CA06A table.

Extended Description

Click the link in this field to enter detailed information about the competitor's product. This is a free-form text field that enables you to enter any information that might assist the sales team when competing with this organization for sales of the specified product. The information that you enter in this field is stored in the F90CA06A table.

8.2.6 Adding Competitor Opportunities

Access the Add Opportunity form.

Complete the steps for entering an opportunity. With the exception of the method with which you access the Add Opportunity form, the steps to enter an opportunity for a competitor are the same as those you complete when entering an opportunity for your own organization.

8.2.7 Setting Processing Options for the Competitor Find Browse Program (P90CA061)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

8.2.7.1 Defaults

These processing options specify default settings that are used to process competitor information.

1. Competitor Search Type

Use this processing option to specify the search type that the system uses to define competitor records in the address book.

8.2.7.2 Versions

These processing options specify default versions that are used to process competitor information.

1. Address Book MBF (P0100041) Version

Use this processing option to specify the version of the Address Book MBF (P0100041) that the system uses when searching for, and working with competitor records. If you leave this option blank, the system uses version ZJDE0001.

8.2.8 Setting Processing Options for the Competitor Application Program (P90CA060)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Caution: The Competitor Find Browse program is hard-coded to call Version ZJDE0001 of the Competitor Application program. Therefore, you should use the ZJDE0001 version and you should not create additional versions of this program. You can change the values in the processing options of the ZJDE0001 version.

If you must create a version other than ZJDE0001, you must modify the Competitor Find Browse program to call the newly-created version. Contact the system administrator or Oracle technical support for additional information.

8.2.8.1 Defaults

These processing options specify default settings that are used to process competitor information.

1. Competitor Search Type

Use this processing option to specify the search type that the system uses to define competitor records in the address book.

8.2.8.2 Versions

These processing options specify default versions that are used to process competitor information.

1. Address Book MBF (P0100041) Version

Use this processing option to specify the version of the Address Book MBF (P0100041) that the system uses when searching for, and working with competitor records. If you leave this option blank, the system uses version ZJDE0001.

8.3 Forecasting Sales Revenue

This section provides overviews of sales forecasts, lists a prerequisite, and discusses how to:

- Create a sales forecast.
- Associate opportunities with a forecast.
- Set processing options for the Manage Forecasts program (P90CB060).

8.3.1 Understanding Sales Forecasts

To successfully manage the business, you must be able to forecast, or estimate with reasonable certainty, the amount of business that the organization will close in the upcoming months. Using the Manage Forecasts program (P90CB060), you can create sales forecasts that can help you project what the organization's sales will be.

Sales forecasts enable you to review the amount of potential revenue for a specified group of opportunities. You can specify search criteria, and then click the Generate button to automatically generate a group of opportunities. You can enter any of these search criteria to generate the list of opportunities:

- Opportunity Type
- Sales Team/Sales Team Member.

You can enter the address book number of a sales team or sales team member. The system searches for opportunities that include the specified address book number on the sales team:

- Industry

The system searches for opportunities whose associated Sold To customer record includes the specified industry.

- Close Date

The system searches for opportunities whose close date falls within the specified date range.

- Probability

The system searched for opportunities whose probability is greater than or equal to the value that you enter in the Probability field.

You can also manually select opportunities to add to the forecast. For example, you might want to create a sales forecast that includes all of the opportunities that are associated with a particular customer. Therefore, you can search for, and assign

opportunities to the forecast based on the customer number. If necessary, you can also remove opportunities from the forecast.

Lastly, you create a combined list of system-generated and manually-selected opportunities to create a sales forecast. However, if you click the Generate button after you manually add opportunities to the list, the system regenerates the list according to the current search criteria, and all manual changes are lost.

When you create a sales forecast, the system calculates the amount of potential revenue for the selected opportunities. The system calculates the revenue amount for each selected opportunity by multiplying the opportunity's probability by the value in either the Line Item Total or the Potential Amount field. You specify which field is used in the processing options of the Manage Forecasts program. The system then totals the calculated revenue for the selected opportunities and populates the Revenue field. If necessary, you can override this amount by entering an amount in the Override Revenue field.

If you feel that the forecast is an accurate depiction of upcoming sales, you can specify that the forecast should be included in demand forecasting by selecting the Approve for Demand Management option. The organization's manufacturing department can then run the SCBM Outbound Processor program (R34A700) which provides them with information in one of these formats, depending on how the program's processing options are set:

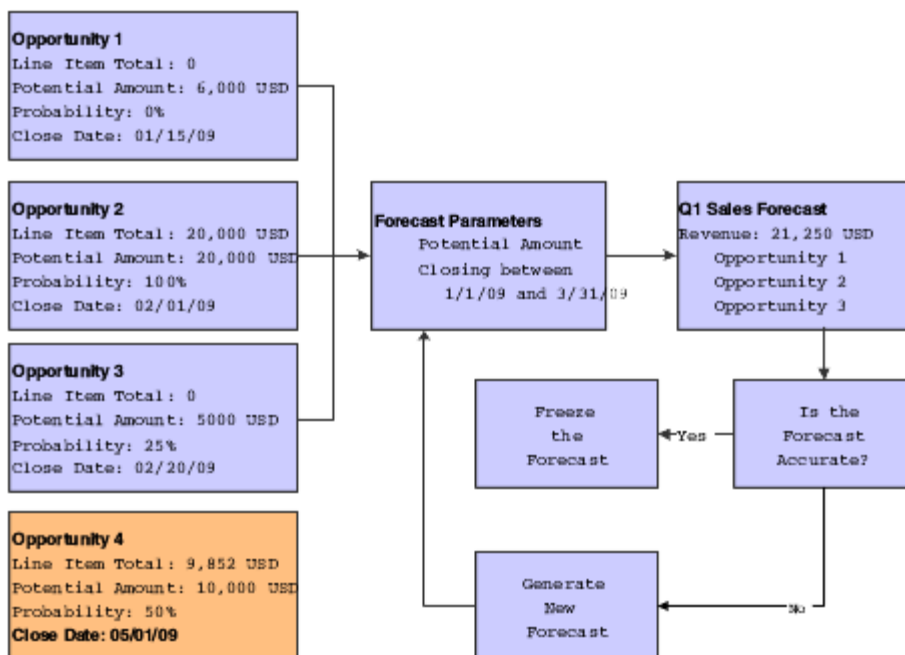
- Information about all opportunities that meet the selection criteria.
- Information about all opportunities that are associated with any sales forecast with the Approve for Demand Management option selected.
- Information about all opportunities that are associated with a frozen sales forecast with the Approve for Demand Management option selected.

See the JD Edwards EnterpriseOne Advanced Planning Systems documentation on the Oracle customer Web site.

After you create, review, and, if necessary, update a sales forecast, you can freeze the forecast. When you freeze the forecast, the system disables all of the information on the forecast so that it cannot be changed. The system also creates a point-in-time snapshot of the forecast. The snapshot includes the associated opportunities, as they are at the time the forecast is frozen. If these opportunities change after the forecast is frozen, the snapshot does not change, which provides you with an audit trail of the actual data that was used to create the forecast.

For example, you might create a forecast for Employee A for the month of August. The forecast includes an opportunity with a large amount of potential revenue. You freeze the forecast. After the forecast is frozen, the large opportunity is lost. At the end of the month, you determine that Employee A's actual revenue was far less than the forecasted amount. When you review the forecast, you can see all of the opportunities that were active at the time the forecast was frozen. These opportunity records appear as they were at the time the forecast was frozen. You can then compare the forecast opportunity records against the current records for these same opportunities to determine the cause of the revenue discrepancy.

This graphic illustrates forecast creation:

Figure 8–5 Creating forecasts

When you create a sales forecast, the system creates records in these tables:

- F90CB060
- F90CB06A
- F90CB060Z

When you freeze a forecast, the system deletes the record in the F90CB06A table and creates records in these tables:

- F90CB06B
- F90CB06C

8.3.1.1 Forecast Dates

When you create a new sales forecast, the system automatically populates the date range fields to encompass one month, using the system date as the From Date. You can change the dates if you want to create a forecast for a different period of time.

8.3.1.2 Revenue Calculation Methods

Sales forecasts include the amount of potential revenue that an organization can expect to generate from a selected group of opportunities during the specified date range. Using the processing options for the Manage Forecasts program, you specify how the system calculates revenue amounts. You can use any of these methods:

- Calculate forecast revenue based on the Potential Revenue field from opportunities.

- Calculate forecast revenue based on the Line Item Total field from opportunities.
- Enter the revenue amount on the forecast.

If you use the Potential Revenue field, the system multiplies the probability of each selected opportunity by the value in the Potential Revenue field. The system then adds these amounts for all of the selected opportunities together and populates the Revenue field with the total.

If you use the Line Item Total field, the system multiplies the probability of each selected opportunity by the value in the Line Item Total field. The system then adds these amounts for all of the selected opportunities together and populates the Revenue field with the total.

Lastly, you can enter a revenue amount directly on the sales forecast. If you enter an amount in the Override Revenue field, the system uses the override value instead of the calculated value, when creating the forecast.

8.3.2 Understanding Sales Pipelines

You can use sales pipelines to help you forecast the amount of revenue that is associated with active sales opportunities. Active sales opportunities are those that have a probability greater than zero and less than 100. You can review the sales pipeline for these entities:

- Employees
- Customers
- Contacts
- Competitors
- Forecasts
- Territories
- Industry Groupings

8.3.3 Prerequisite

To view pipeline amounts, you must have active opportunities in the system. An active opportunity is one with a probability greater than zero and less than 100.

See [Managing Sales Opportunities](#).

8.3.4 Forms Used to Forecast Sales Revenue

Form Name	FormID	Navigation	Usage
Search for Forecasts	W90CB060A	Periodic Sales Force Automation Processing (G90CA02), Forecast	Review existing forecasts or access forms to add new forecasts.
Add Forecast	W90CB060C	Click Add on Search for Forecasts.	Create a new forecast.

Form Name	FormID	Navigation	Usage
Forecast - Manage {Forecast Name}	W90CB060B	Select a forecast from the Search for Forecasts form.	Review forecast information, including the sales pipeline, and assign opportunities to the forecast.
Search for Competitors	W90CA061A	Periodic Sales Force Automation Processing (G90CA02), Competitor	Select competitors.
Manage {Competitor Name}	W90CA060A	Select a competitor on the Search for Competitors form. Click the Pipeline link on the Sales tab.	Review the pipeline for a competitor.
Search for Employees	W90CA040F	Periodic Sales Force Automation Processing (G90CA02), Employee	Select an employee.
Employee - Manage {Employee Name}	W90CA040A	Select an employee on the Search for Employees form. Click the Pipeline link on the Sales tab.	Review the pipeline for an employee.
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer	Select a customer.
Customer - Manage {Customer Name}	W90CA08AA	Select the customer on the Search for Customers form. Click the Pipeline link on the Sales tab.	Review the pipeline for a customer.
Search for Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact	Select a contact.
Contact - Manage {Contact Name}	W90CA07PA	Select the contact on the Search for Contacts form. Click the Pipeline link on the Sales tab.	Review the pipeline for a contact.
Search for Territories	W90CA140K	Sales Force Automation Setup (G90CA03), Territory	Select a territory.
Territory - Manage {Territory Name}	W90CA140A	Select a territory on the Search for Territories form. Click the Pipeline link on the Sales tab.	Review the pipeline for a territory.
Search for Industry Grouping	W90CA12AB	Sales Force Automation Setup (G90CA03), Industry Grouping	Select an industry grouping.

Form Name	FormID	Navigation	Usage
Industry Grouping - Manage {Industry Grouping Name}	W90CA12AA	Select an industry grouping on Search for Industry Grouping. Click the Pipeline link on the Sales tab.	Review the pipeline for an industry grouping.

8.3.5 Creating a Sales Forecast

Access the Add Forecast form.

Figure 8–6 Add Forecast form

The screenshot shows the 'Forecast - Add Forecast' form. At the top, there are four buttons: 'Save and Close', 'Save and Continue', 'Save and Add New', and 'Cancel'. Below these, the 'Description' field contains 'Annual Sales Forecast'. The 'Comments' field contains 'This is the annual sales forecast for the office supplies divisions.'. The 'Start Date' is '12/23/2011' and the 'End Date' is '01/22/2012'. The 'Revenue' field is 'USD'. The 'Forecast For' field is '6001 Allen, Ray'. The 'Entered By' field is '0'. The 'Last Modified' field is empty. There is a checkbox for 'Approved for Demand Management'. The 'Override Revenue' field is 'USD'. The 'Forecast For Contact' field is '0'. The 'Date Entered' and 'Submitted Date' fields are empty.

After you have completed this information, click Save and Continue, and proceed to the next task to complete the sales forecast.

Revenue

Review the amount of revenue that the system calculated for selected group of opportunities. This value is calculated using the Potential Revenue field or the Line Item Total field for the opportunities that are associated with the forecast. You specify which field the system uses in the processing options of the Manage Forecast program.

Override Revenue

Enter the amount of revenue that you want to use to create the sales forecast. If you enter a value in this field, the system does not use the value in the Revenue field when creating the forecast. You might enter a value in this field if you think that the calculated amount of revenue is incorrect.

For example, you might have an opportunity that is very early in the sales cycle and, therefore, has a low probability of closing. However, you might have information that makes you confident that the sale will close. Therefore, you might want to enter a value that is greater than the value in the Revenue field, as this might more accurately reflect the amount of revenue that should be included in the forecast.

Forecast For

Enter the address book number of the person for whom you are creating the forecast. You can enter any entity that has a record in the F0111 table.

This field is not used when determining which opportunities to associate with the forecast. This field is informational only.

Forecast For Contact

Enter the contact person that is associated with the organization that you entered in the Forecast For field. Enter a value in this field only if you enter an organization in the Forecast For field. If you enter an individual in the Forecast For field, leave this field blank.

Approve for Demand Management

Select this option to specify that this forecast is accurate enough to be considered in demand forecasting and planning. You should select this option only if you think that the forecast and the associated opportunities are an accurate indication of future demand and could, therefore, be used for demand calculations.

8.3.6 Associating Opportunities with a Forecast

Access the Forecast - Manage {Forecast Name} Forecast form. Select the Sales tab. Click the Opportunity link.

Figure 8–7 Forecast - Manage {Forecast Name} Forecast form: Sales tab: Opportunity link

The screenshot shows the 'Forecast - Manage {Forecast Name} Forecast form' with the 'Sales' tab selected. The 'Opportunity' link is active. The form includes a 'Criteria' section with fields for Start Date (04/25/2007), End Date (05/25/2007), Probability >= (0), Opportunity Type, Industry, and Sales Team. A 'Generate' button is present. Below the criteria is the 'Assigned Opportunities' section, which displays a table of opportunities. The table has columns for Description, Customer Name, Sales Cycle Step, and Close Date. The table shows 6 records, with the first 5 visible. The 'Assign Opportunity' and 'Remove' buttons are at the bottom.

Description	Customer Name	Sales Cycle Step	Close Date
OPP1	CRM Pipeline Custo...	Initial Call	09/28/2007
OPP2	CRM Pipeline Custo...	Schedule Mtg	07/28/2007
OPP3	CRM Pipeline Custo...	Discuss Business ...	08/28/2007
OPP4	CRM Pipeline Custo...	Demo	07/28/2007
OPP5	CRM Pipeline Custo...	Follow Up Call	06/28/2007
OPP6	CRM Pipeline Custo...	Quote	06/28/2007

To associate opportunities with a forecast:

1. Enter a date range.

The system includes the opportunities with a close date that falls within the date range that you specify. If you do not enter a date range, the system includes all active opportunities that have not closed as of the date the forecast is created.

2. To narrow the search for opportunities, complete any of these fields:
 - Opportunity Type
 - Industry

- Probability
- 3. Specify the sales team or sales team member that is associated with the opportunities that you want to include in the forecast in the Sales Team field.
The system searches for opportunities that contain the specified address number on the sales team.
- 4. Click the Generate button to display a list of opportunities that meet the criteria that you entered.
These opportunities are now associated with the forecast.
- 5. To add additional opportunities to the forecast, click the Assign Opportunity button.
- 6. On Opportunity Search and Select, locate and select the opportunities that you want to include in the forecast, and then click Select.
If you generated a list of opportunities, the opportunities that you select here are added to the generated list of opportunities. Be aware, if you click the Generate button again, the system regenerates the list of opportunities for the forecast based on the criteria that you define in steps 1 and 2, and discards any manual additions or deletions.
- 7. To remove an opportunity from the forecast, select the records that you want to remove in the Assigned Opportunities section of the form, and then click the Remove button.
- 8. When the Assigned Opportunities section of the form includes all of the opportunities that you want to associate with the forecast, click the Save Changes button.

8.3.7 Setting Processing Options for the Manage Forecasts Program (P90CB060)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

8.3.7.1 Process

These processing options specify how the system processes forecast information.

1. Basis for Revenue Calculation

Use this processing option to specify which field the system uses to calculate the revenue amount for a sales forecast. You can use the Potential Amount field or the Line Item Total field from the selected opportunities. Values are:

1: Potential Amount field

0: Line Item Total field

8.3.7.2 Version

These processing options specify the version that the system uses to process forecast information.

1. Opportunity

Use this processing option to specify the version of the Manage Opportunity program (P90CB020) that the system uses when creating sales forecasts. If you leave this option blank, the system uses version ZJDE0001.

8.4 Reviewing Sales Pipelines

This section provides an overview of sales pipelines and discusses how to review opportunities from the pipeline.

8.4.1 Understanding the Sales Pipeline

You use sales pipelines to help you forecast the amount of revenue that is associated with active sales opportunities. Active sales opportunities are those that have a probability greater than zero and less than 100. The Sales Pipeline program (P90CB128) displays potential revenue amounts in a graphical bar chart. Each bar in the chart represents a probability range. You can click on each bar to review the opportunities that are associated with that probability range.

You can review the sales pipeline for these entities:

- Employees
- Customers
- Contacts
- Competitors
- Forecasts
- Territories
- Industry Groupings

Each pipeline includes these probability ranges:

- 90–99 percent
- 80–89 percent
- 70–79 percent
- 60–69 percent
- 50–59 percent
- 40–49 percent
- 30–39 percent
- 20–29 percent
- 10–19 percent
- 1–9 percent

The system uses the probability associated with the sales cycle steps on the opportunity to calculate the amount of revenue to enter into the pipeline. The probability is multiplied by the value in the Potential Amount field. The system then inserts the calculated amount into the pipeline section that is associated with the

opportunity's probability. The Line Item Total field is not used to calculate pipeline amounts.

This table shows how pipeline amounts are calculated for opportunities:

Opportunity Probability	Line Item Total	Potential Amount	Calculation	Effect on Pipeline
55 percent	Blank	100,000 USD	$100,000 \times .55 = 55,000$	55,000 USD is entered into the 50–59 percent section of the pipeline.
55 percent	100,000 USD	Blank	$\text{Blank} \times .55 = 0$	Nothing is entered into the pipeline because the calculation resulted in a zero amount.

8.4.1.1 Using the Pipeline Chart

When you review a sales pipeline, the system creates a graphical bar chart with bars that represent the amount in each probability range. You can review the graphical chart for an overview of the pipeline or you can hover your cursor over a specific bar to view the amount that is associated with that probability range. Additionally, you can review detailed information about the opportunities that make up the chart by clicking on a particular bar. When you click on a bar, the system lists all of the opportunities associated with that bar, and you can select and review each individual opportunity.

Note: If a probability range in the pipeline contains only a very small monetary amount, it is possible that the system will not display a bar for that range. However, you can review the amount associated with the range by hovering your cursor over that probability range. For example, if probability range 1–9 percent contains only 75 USD while other ranges have pipeline amounts of 78,000 USD and 84,000 USD, then the system will not display a bar for the 1–9 percent range. If you hover over that range, the system displays 75 USD as the amount.

The title of the pipeline bar chart displays the total monetary amount in the pipeline. The currency that is associated with the pipeline appears on the left side of the form. The currency appears only if currency processing is turned on.

Note: You can disable the graphical display of the pipeline information and choose to display your data in a nongraphical grid format. Visually impaired users who use screen-reading software might need to use the nongraphical format. You use the accessibility options in the user profile to determine whether you display the pipeline information in graphical or nongraphical format.

See "Working With User and Role Profiles", in the *JD Edwards EnterpriseOne Tools Security Administration Guide*

8.4.2 Forms Used to Review Sales Pipelines

Form Name	FormID	Navigation	Usage
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer	Search for and select a customer.
Customer - Manage {customer name}	W90CA080A	From the Search for Customers form, select a customer by clicking on the customer name.	Review the sales pipeline for a customer.
Search for Opportunities	W90CA020B	Daily Sales Force Automation Processing (G90CA01), Opportunity	Search for and select an opportunity.
Opportunity - Manage {opportunity name}	W90CB020A	On Search for Opportunities, select an opportunity by clicking the opportunity name link.	View the pipeline for an opportunity.
Search for Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact	Search for and select a contact.
Contact - Manage {contact name}	W90CA070B	On the Search for Contacts form, select a contact by clicking on the contact name link.	Review the pipeline for a customer.
Search for Competitors	W90CA061A	Periodic Sales Force Automation Processing (G90CA02), Competitor	Search for and select a competitor.
Competitor - Manage {competitor name}	W90CA060A	On Search for Competitors, select a competitor by clicking on the competitor name link.	Review the pipeline for a competitor.
Search for Employees	W90CA040F	Periodic Sales Force Automation Processing (G90CA02), Employee	Search for and select an employee.
Employee - Manage {employee name}	W90CA040A	On Search for Employees, select an employee by clicking on the employee name link.	Review the pipeline for an employee.
Search for Forecasts	W90CB060A	Periodic Sales Force Automation Processing (G90CA02), Forecast	Search for and select a forecast.

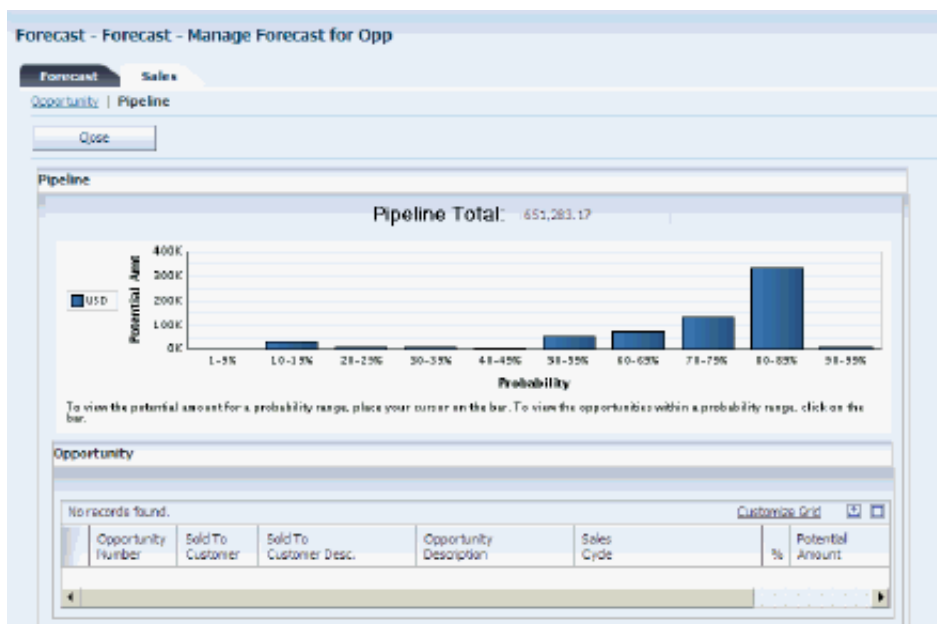
Form Name	FormID	Navigation	Usage
Forecast - Manage {forecast name}	W90CB060B	On Search for Forecasts, select a forecast by clicking on the forecast name link.	Review the pipeline for a sales forecast.

8.4.3 Reviewing a Sales Pipeline

Access any of these forms, select the Sales tab, and then click the Pipeline link:

- Customer - Manage {customer name}
- Opportunity - Manage {opportunity name}
- Contact - Manage {contact name}
- Competitor - Manage {competitor name}
- Employee - Manage {employee name}
- Forecast - Manage {forecast name}

Figure 8–8 Customer - Manage {customer name} form



Delivered Workflow for JD Edwards EnterpriseOne Customer Relationship Management Sales Applications

This appendix contains the following topics:

- [Section A.1, "Delivered Workflow for JD Edwards EnterpriseOne Customer Relationship Management Sales Applications"](#)

See Also:

- *JD Edwards EnterpriseOne Tools Workflow Tools Guide*

A.1 Delivered Workflow for JD Edwards EnterpriseOne Customer Relationship Management Sales Applications

This section discusses the JD Edwards EnterpriseOne Customer Relationship Management Sales Applications workflow.

A.1.1 Opportunity Creation and Sales Cycle Step Change Notification

This section discusses the Opportunity Creation and Sales Cycle Step Change Notification workflow.

A.1.1.1 Description

Workflow Description

The system sends a workflow message to the active sales team members to notify them when a new opportunity is created, or if the cycle step changes on an existing opportunity.

Workflow Trigger

An opportunity record is created or the sales cycle step on an existing opportunity record changes.

Workflow Action

The active sales team members receive a message in the workcenter, notifying them that a new opportunity has been created or that the sales cycle step of an existing opportunity has changed. The message includes the opportunity description, ID number, previous sales cycle step, current sales cycle step, sales methodology, sold to customer, and the ship to customer.

A.1.1.2 Workflow Objects

System

90CB

Workflow Object Name

JDECRMCHG

Object ID

N90CB137

Event Description / Function Name

OpportunityWFProcessinginCRM

Sequence / Line Number

3

B

JD Edwards EnterpriseOne CRM Sales Application Reports

This appendix contains the following topics:

- [Section B.1, "JD Edwards EnterpriseOne CRM Sales Application Reports: A to Z"](#)
- [Section B.2, "JD Edwards EnterpriseOne CRM Sales Applications: Selected Reports"](#)

B.1 JD Edwards EnterpriseOne CRM Sales Application Reports: A to Z

These tables list the CRM Sales application reports, sorted alphanumerically by report ID. The report tables are broken down into these categories:

- Lead
- Opportunity
- Forecast
- Action Plan/ Activity
- Competitor
- Customer
- Employee
- Partner
- Contact
- Product Catalog

B.1.1 Lead

These reports are available for sales leads:

Report ID and Report Name	Description	Navigation
R90CB010A Lead Tracking Report	This report includes all leads that have been entered during the specified date range, organized by lead status.	Leads (G90CA0201), select Lead Tracking
R90CB010B Lead By Product Category Report	This report includes a list of leads for each product line. The report includes the lead name, company, city, and qualification score.	Leads (G90CA0201), select Lead By Product

Report ID and Report Name	Description	Navigation
R90CB010C Lead By Lead Source Report	This report includes a list of leads, organized by lead source. The report includes each lead's name, company, city, state, and phone number. The report also includes the total number of leads per lead source.	Leads (G90CA0201), select Lead By Lead Source
R90CB5161, Version XJDE5160 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5160 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5160)
R90CB5161, Version XJDE5161 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5161 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5161)
R90CB5161, Version XJDE5163 Lead Address Avery Report	This report produces shipping labels for each active lead in the system in Avery 5163 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Shipping Address (Avery 5163)
R90CB5161, Version XJDE5389 Lead Address Avery Report	This report produces index post card labels for each active lead in the system in Avery 5389 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Index Post Card (Avery 5389)
R90CB5161, Version XJDE5663 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5663 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Clear Address (Avery 5663)

B.1.2 Opportunity

These reports are available for sales opportunities:

Report ID and Report Name	Description	Navigation
R90CB020A Opportunities by Channels Report	This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel
R90CB020B Opportunities by Probability Report	This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability

Report ID and Report Name	Description	Navigation
R90CB020C Opportunities by Probability for a Sales Rep Report	This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability For Selected Sales Representatives
R90CB020D Opportunities by Territories Report	This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Territory
R90CB020E Opportunities by Channels for a Sales Rep Report	This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel For Selected Sales Representatives
R90CB020I Opportunity Summary Report	This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.	Opportunity (G90CA0202), select Opportunity Summary

B.1.3 Forecast

These reports are available for sales forecasts:

Report ID and Report Name	Description	Navigation
R90CB06A Forecast - Frozen Forecast Status Report	This report displays a frozen forecast with all of the forecast's associated opportunities as of the current date. The report enables users to review the change, if any, in the dollar amounts for opportunities between the current date and the date the forecast was frozen.	Forecast (G90CA0203), select Frozen Forecast Status
R90CB020F Opportunity Pipeline Review by Close Date Report	This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.	Forecast (G90CA0203), select Pipeline Review By Close Date

B.1.4 Action Plan/Activity

These reports are available for activities and action plans:

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/ Activity (G90CA0204), select Action Plan Listing
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/ Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/ Activity (G90CA0204), select Activity - Periodic Planner

B.1.5 Competitor

These reports are available for competitors:

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail Report	This report includes all information about a competitor and their products. You can use this report to compare the products from your organization with those of the competitors.	Competitor (G90CA0205), select Competitor Product Selected

B.1.6 Customer

These reports are available for customers:

Report ID and Report Name	Description	Navigation
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer

B.1.7 Employee

These reports are available for employees:

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List

B.1.8 Partner

These reports are available for partners:

Report ID and Report Name	Description	Navigation
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

B.1.9 Contact

These reports are available for contacts:

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)

B.1.10 Product Catalog

These reports are available for product catalogs:

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

B.2 JD Edwards EnterpriseOne CRM Sales Applications: Selected Reports

These reports are listed alphanumerically by report ID in this appendix.

B.2.1 R90CA1301B - Activities For A Customer Contact Report

This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.

B.2.2 Processing Options for the Activities For A Customer Contact Report (R90CA1301B)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.2.1 Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number Type for Business phone:

Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).

B.2.3 R90CA13D - Periodic Planner Report

This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.

B.2.4 Processing Options for the Periodic Planner Report (R90CA13D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.4.1 Process

These processing options specify the dates that are used when creating the report.

1. Enter Start Date:

Use this processing option to specify the beginning date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.

2. Enter End Date:

Use this processing option to specify the end date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.

B.2.4.2 Print

These processing options specify the types of information to print on the report.

1. Include "Task" Section:

Use this processing option to specify whether the system prints the Task section on the report. If you leave this option blank, the system includes the Task section and the Activities section on the report. If you enter 1 in this option, the system includes only the Activities section on the report. Values are:

Blank: Include Task Section.

1: Do Not Include Task Section.

B.2.5 R90CA080B - Customer/Contact Summary Report

This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.

B.2.6 Processing Options for the Customer/Contact Summary Report (R90CA080B)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.6.1 Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number Type for Business phone:

Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).

2. Enter Electronic Address Type for Internet Address (url):

Use this processing option to specify which customer URL to print on the report. Values are stored in UDC (01/ET).

3. Enter Electronic Address Type for Email address:

Use this processing option to specify which customer email address to print on the report. Values are stored in UDC (01/ET).

4. Enter Type - Address for Work address:

Use this processing option to specify which customer address to print on the report. Values are stored in UDC (01/AT).

B.2.7 R90CA0101E - Employee Phone List Report

This report includes all active employees in the system, along with their titles and phone numbers.

B.2.8 Processing Options for the Employee Phone List Report (R90CA0101E)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.8.1 Defaults

These processing options specify default information that is used to process the report.

1. Enter Search Type for an Employee:

Use this processing option to specify the search type that is used to identify employees. Values are stored in UDC (01/ST).

2. Enter Phone Number Type for Business Phone:

Use this processing option to specify the phone number type that is used to specify the employee phone number that you want to print on the report. Values are stored in UDC (01/PH).

B.2.9 R90CA0111A - Contacts for a Customer Report

This report lists each contact, along with the associated contact information for each selected customer.

B.2.10 Processing Options for the Contacts for a Customer Report (R90CA0111A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.10.1 Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number Type for Business phone:

Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).

2. Enter Phone Number Type for Fax number:

Use this processing option to specify which customer fax number to print on the report. Values are stored in UDC (01/PH).

3. Enter Type - Address for Work address:

Use this processing option to specify which customer address to print on the report. Values are stored in UDC (01/AT).

B.2.11 R90CB010A - Lead Tracking Report

This report includes all leads that have been entered during the specified date range, organized by lead status.

B.2.12 Processing Options for the Lead Tracking Report (R90CB010A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.12.1 Process

These processing options specify the date range to use for lead tracking.

1. Begin Date:

Use this processing option to specify the beginning date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.

2. End Date:

Use this processing option to specify the end date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.

B.2.13 R90CB020A - Opportunities by Channel Report

This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.

B.2.14 Processing Options for the Opportunities by Channel Report (R90CB020A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.14.1 Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Channel report. If you leave this option blank, the system uses USD (United States Dollars).

B.2.15 R90CB020B - Opportunities by Probability Report

This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.

B.2.16 Processing Options for the Opportunities by Probability Report (R90CB020B)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.16.1 Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Probability report. If you leave this option blank, the system uses USD (United States Dollars).

B.2.17 R90CB020C - Opportunities by Probability for a Sales Rep Report

This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.

B.2.18 Processing Options for the Opportunities by Probability for a Sales Rep Report (R90CB020C)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.18.1 Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Probability for a Sales Rep report. If you leave this option blank, the system uses USD (United States Dollars).

B.2.19 R90CB020D - Opportunities by Territories Report

This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.

B.2.20 Processing Options for the Opportunities by Territories Report (R90CB020D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.20.1 Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Territories report. If you leave this option blank, the system uses USD (United States Dollars).

B.2.21 R90CB020E - Opportunities by Channels for a Sales Rep Report

This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.

B.2.22 Processing Options for the Opportunities by Channels for a Sales Rep Report (R90CB020E)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any

values, including the version number, version title, prompting options, security, and processing options.

B.2.22.1 Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Channels for a Sales Rep report. If you leave this option blank, the system uses USD (United States Dollars).

B.2.23 R90CB020F - Pipeline Review By Close Date Report

This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.

B.2.24 Processing Options for the Pipeline Review By Close Date Report (R90CB020F)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.24.1 Review Opportunity Pipeline

These processing options specify the default information that the system uses to process opportunity information.

1. Begin Date:

Use this processing option to specify the beginning date in the date range for which you want to track opportunities that are included in the pipeline. If you leave this option blank, the system uses today's date.

2. End Date:

Use this processing option to specify the ending date in the date range for which you want to track opportunities that are included in the pipeline. If you leave this option blank, the system uses today's date.

3. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Pipeline Review By Close Date report. If you leave this option blank, the system uses USD (United States Dollars).

B.2.25 R90CB020I - Opportunity Summary Report

This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.

B.2.26 Processing Options for the Opportunity Summary Report (R90CB020I)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

B.2.26.1 Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunity Summary report. If you leave this option blank, the system uses USD (United States Dollars).

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