Oracle® Sales and Marketing Connected Client User's Guide

Release 11

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Oracle® Sales and Marketing Connected Client
User's Guide
Release 11

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Contents

Preface

Welcome to the *Oracle® Sales and Marketing Connected Client User's Guide, Release 11*.

This user's guide includes the information you need to work with Oracle Sales and Marketing effectively. It contains detailed information about the following:

- Overview and reference information
- Specific tasks you can accomplish using Oracle Sales and Marketing
- Oracle Sales and Marketing setup
- Oracle Sales and Marketing functions and features
- Oracle Sales and Marketing windows

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

About This User’s Guide

This guide is a complete source of information about Oracle Sales and Marketing Connected Client. It contains overviews as well as task and reference information. This guide includes the following chapters and appendices:

- Chapter 1 introduces you to Oracle Sales and Marketing Connected Client’s user interface, keyboard shortcuts, navigational features, and modem setup.
- Chapter 2 describes how to manage your account information with Sales and Marketing.
- Chapter 3 describes how to use Sales and Marketing to manage your database of contacts.
- Chapter 4 provides you with information about major scheduling and mailing activities related to contacts.
- Chapter 5 describes how to find, enter, and maintain sales opportunity information.
- Chapter 6 describes how you can use the Activity module to record, review, and add information about an account, contact, and opportunity.
- Chapter 7 describes how to use the various windows to view pending, current, and past customer orders.
- Chapter 8 provides you with information about the Events module. This module lets you organize all aspects of planning events.
- Chapter 9 explains how Sales and Marketing can be used to provide several alternatives for setting up and sending out literature.
- Chapter 10 describes how you can use the Promotions module in Sales and Marketing to create and track responses to promotional campaigns.
- Chapter 11 describes how to create scripts to automically setup actions to make everyday tasks, such as sending collateral, easier.
- Chapter 12 explains how Sales and Marketing can help you organize and track the effectiveness of a promotional program.
- Chapter 13 describes how to manage sales territories using Sales and Marketing.

- Chapter 14 provides you with information about the Forecasting module. This module allows you to project your progress towards sales goals.
- Chapter 15 explains how Sales and Marketing quotation system can be used to generate real–time pricing information for customers considering a purchase.
- Appendix A provides the default navigator path for each Oracle Sales and Marketing window.
- Appendix B lists the menus and submenus associated with each of the default responsibilities assigned in Oracle Sales and Marketing.
- Appendix C lists all Oracle Sales and Marketing QuickCode lookup types and any default value furnished with the product.
- Appendix D describes the Oracle Sales and Marketing Microsoft Schedule+ integration.

Audience for This Guide

This guide assumes you have a working knowledge of your business area's processes and tools. It also assumes you are familiar with Sales and Marketing. If you have never used Sales and Marketing, we suggest you attend one or more of the Sales and Marketing training classes available through World Wide Education. For more information about Sales and Marketing and Oracle training, see: Other Information Sources.

Do Not Use Database Tools to Modify Oracle Applications Data

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

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle

Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Consequently, we STRONGLY RECOMMEND that you never use SQL*Plus or any other tool to modify Oracle Applications data unless otherwise instructed.

Other Information Sources

Here are some other ways you can increase your knowledge and understanding of Sales and Marketing.

Online Documentation

All Oracle Applications documentation is available online on CD–ROM, except for technical reference manuals. There are two online formats, HyperText Markup Language (HTML) and Adobe Acrobat (PDF).

All user's guides are available in HTML, Acrobat, and paper. Technical reference manuals are available in paper only. Other documentation is available in Acrobat and paper.

The *content* of the documentation does not differ from format to format. There may be slight differences due to publication standards, but such differences do not affect content. For example, page numbers and screen shots are not included in HTML.

The HTML documentation is available from all Oracle Applications windows. Each window is programmed to start your web browser and open a specific, context–sensitive section. Once any section of the HTML documentation is open, you can navigate freely throughout all Oracle Applications documentation. The HTML documentation also ships with Oracle Information Navigator (if your national language supports this tool), which enables you to search for words and phrases throughout the documentation set.

Related User's Guides

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

If you do not have the hardcopy versions of these manuals, you can read them online using the Applications Library icon or Help menu command.

Oracle Applications User's Guide

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

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Applications Demonstration User's Guide

This guide documents the functional storyline and product flows for Global Computers, a fictional manufacturer of personal computers products and services. As well as including product overviews, the book contains detailed discussions and examples across each of the major product flows. Tables, illustrations, and charts summarize key flows and data elements.

Oracle Sales and Marketing Disconnected Client User's Guide, Release 10SC

This guide describes how to set up your disconnected client, manage your account information, manage your database of contacts, and how to find, enter, and maintain sales opportunity information. This guide also describes how to record, review, and add information about an account, contact, or opportunity, and how to view pending, current, and past customer orders.

Reference Manuals

Oracle Automotive Implementation Manual

This manual describes the setup and implementation of the Oracle Applications used for the Oracle Automotive solution.

Oracle Manufacturing, Distribution, Sales and Service Open Interfaces Manual

This manual contains up–to–date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD–ROM for Release 11.

Oracle Project Manufacturing Implementation Manual

This manual describes the setup steps and implementation for Oracle Project Manufacturing.

Oracle Self–Service Web Applications Implementation Manual

This manual describes the setup steps for Oracle Self–Service Web Applications and the Web Applications dictionary.

Installation and System Administration

Oracle Alert User's Guide

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

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Sales and Marketing. This manual details additional steps and setup considerations for implementing Sales and Marketing with this feature.

Multiple Organizations in Oracle Applications

If you use the Oracle Applications Multiple Organization Support feature to use multiple sets of books for one Sales and Marketing installation, this guide describes all you need to know about setting up and using Sales and Marketing with this feature.

Oracle Applications Implementation Wizard User's Guide

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

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Developer/2000 forms so that they integrate with Oracle Applications.

Oracle Applications Flexfields Guide

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

Oracle Applications Installation Manual for Windows Clients

This guide provides information you need to successfully install Oracle Financials, Oracle Public Sector Financials, Oracle Manufacturing, or Oracle Human Resources in your specific hardware and operating system software environment.

Oracle Applications Product Update Notes

If you are upgrading your Oracle Applications, refer to the product update notes appropriate to your update and product(s) to see summaries of new features as well as changes to database objects, profile options and seed data added for each new release.

Oracle Applications Upgrade Preparation Manual

This guide explains how to prepare your Oracle Applications products for an upgrade. It also contains information on completing the upgrade procedure for each product. Refer to this manual and the *Oracle Applications Installation Manual* when you plan to upgrade your products.

Oracle Applications System Administrator's Guide

This manual provides planning and reference information for the Sales and Marketing System Administrator.

Other Sources

Training

We offer a complete set of formal training courses to help you and your staff master Sales and Marketing and reach full productivity quickly. We organize these courses into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle Education Services at any one of our many Education Centers, or you can arrange for our trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Sales and Marketing working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8 server, and your hardware and software environment.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources and sales and service management.

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

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 140 countries around the world.

Thank You

Thank you for using Sales and Marketing and this user's guide.

We value your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Sales and Marketing or this user's guide. Mail your comments to the following address or call us directly at (650) 506–7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to **appsdoc@us.oracle.com**.

CHAPTER

1

Setting Up

This chapter introduces you to Oracle Sales and Marketing's user interface, keyboard shortcuts, navigational features, modem setup, profile options, and automatic dialing setup. In addition, a list of terminology used throughout this user's guide is included in this chapter.

The following topics are included:

The following tasks are included:

- Searching for Records: page 1 – 12
- Using Fuzzy Find: page 1 – 13
- Changing Your Serial Port / Modem Connection: page 1 – 16
- Setting a Prefix for Automatic Dialing: page 1 – 16

Oracle Applications Implementation Wizard

If you are implementing more than one Oracle Applications product, you may want to use the Oracle Applications Implementation Wizard to coordinate your setup activities. The Implementation Wizard guides you through the setup steps for the applications you have installed, suggesting a logical sequence that satisfies cross–product implementation dependencies and reduces redundant setup steps. The Wizard also identifies steps that can be completed independently—by several teams working in parallel—to help you manage your implementation process most efficiently.

You can use the Implementation Wizard as a resource center to see a graphical overview of setup steps, read online help for a setup activity, and open the appropriate setup window. You can also document your implementation, for further reference and review, by using the Wizard to record comments for each step.

Set Up Oracle Applications Technology

The setup steps in this chapter tell you how to implement the parts of Oracle Applications specific to Oracle Sales and Marketing.

The Implementation Wizard guides you through the entire Oracle Applications setup, including system administration. However, if you do not use the Wizard, you need to complete several other setup steps, including:

- Performing system–wide setup tasks such as configuring concurrent managers and printers
- Managing data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities

Also, if your product uses Oracle Workflow to, for example, manage the approval of business documents or to derive Accounting Flexfield values via the Account Generator, you need to set up Oracle Workflow.

See Also

Oracle Applications Implementation Wizard User's Guide

Oracle Applications System Administrator's Guide

Oracle Workflow Guide

The User Interface

The Oracle Sales and Marketing Connected Client User's Guide frequently refers to fields, menus, and windows that you use to enter and view information. These are briefly described in this section. In addition, this section describes the toolbar and how to use the List of Values (LOV).

The Navigator

After you sign on to Oracle Applications and choose an Sales and Marketing responsibility, the Navigator window appears.

The Navigator window lists the business tasks that you can perform in Oracle Sales and Marketing. This lets you access the Oracle Sales and Marketing windows.

Window Title, Message Line, and Status Line

You can get information about the current window by viewing any of the following:

Window Title: A title along the top of a window that displays the name of the window and, where applicable, context information pertinent to the information in the window.

For example, if you open the Account Detail window for the account Technology Inc. in Santa Clara, the window title displays:

Account Detail: [Technology Inc., Santa Clara]

Message Line: A line near the bottom left of the window that displays hints or warning messages when you encounter an error.

Status Line: A line below the message line that displays status information about the current window or field.

For example, if you are in Enter Query mode the status line displays the phrase Enter Query. If you are in a field that has a list of values available, the status line displays the message <List>.

Control Menu Box

Every window has a Control Menu box in the upper right corner that you can choose to close the window.

File Tab Windows

Oracle Sales and Marketing uses file tab windows, which let you pick and pull tabs to the foreground by selecting the tab.

Menus

When you start up Oracle Applications a root window opens displaying the sign–on window, a menu bar, and a toolbar. You use the menu and toolbar to help you perform various functions, such as saving records, performing a search, or moving between windows. Notice as you navigate through the system that only valid menu or toolbar choices for the current field are enabled.

The menu bar includes the following pull–down menus:

Action: Navigate to a new window, save or clear data in a window, refresh a window, or exit the application.

Edit: Clear, delete, or add records. Cut, copy, and paste information from one field to another, or from a different Windows application into Oracles Sales and Marketing.

Query: Search for information from the Oracle Applications database. Enter, run, or cancel a query; count matching records; show the last search criteria used; and see the next record or set of records from a query.

Go: Navigate to another window, or between fields and records in a window.

Folder: Customize the presentation of data in a folder. (Many of the multirow, multicolumn windows are folder windows.) Use the Folder menu options to create, save, and delete folder definitions; to show, hide, rearrange, or size columns; and to change the sort order of the display.

See also Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide.*

Special: Display To Dos and Notes Activity window, Interaction window, Merge Contact window, and also lets you go backward and forward between windows.

Help: View context sensitive or system Help, keyboard mapping for special function keys, or information about the current record.

Window: Toggle between currently open windows.

Frequently Used Menu Commands

Listed below are menu commands you will find especially helpful:

Action/Navigate To: Brings the Navigator forward so that you can choose a new business task. If you check the Close Existing Windows check box and then choose an option from the Navigator, the system closes any open windows and opens a new starting window.

Action/Exit Oracle Applications: Ends your current session of Oracle Sales and Marketing and returns you to the Windows Program Manager.

Edit/Cut or Copy and Paste: These three field editing functions are options in the Edit menu. Use Cut to remove highlighted information from a field. Use Copy and Paste to copy highlighted information from one field to another.

Edit/Clear Field: Choose this option from the Edit menu to clear information from the current field.

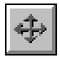
Edit/Clear Record: Choose this option when you have begun editing something and don’t want to save it, or when you are getting the ’Item must be entered’ message and don’t want to save anything.

Help/About This Record: Choose this option to view information about a specific record such as who created it and the date it was created.

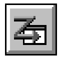
Help/Window Help: Choose this option to access context sensitive help.

Toolbar

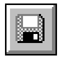
The toolbar is a collection of iconic buttons that perform a specific action when you choose it. Each toolbar button replicates a frequently used menu item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. If the toolbar button is enabled for the window you are currently in, the action it performs appears in the message line.



Navigate: Display the Navigator.



Zoom: Invoke a custom–defined Zoom (or list of Zooms). There are no predefined zooms shipped with R11 Oracle Sales and Marketing.



Save: Save any pending changes in the current form.

Save and Proceed: Save any pending changes and return to the open window to a new record.

Print: Print the current screen or in special cases, display a list of reports to print.

Clear Form: Clear all pending changes in the current form.

Summary/Detail: Switch between the summary and detail view of the current record.

Find: Display Find window to retrieve records.

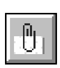
New Record: Create a new record.

Delete Record: Delete the current record from the database.

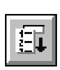
Clear Record: Clear the current record from the window.

Tool Palette: Display the Folder tool palette.

Translations: Display the Translations window to enter text, such as a description, in a foreign language. This button is not available in Oracle Sales and Marketing.



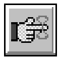
Attachments/No Attachments: Display the Attachments window to update or view the current attachment or to create a new one.



List of Values: Show the list of valid values for the current field.

Edit Field...: Display the Editor window for the current field.

Window Help: Display general help for the current application.

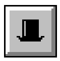


To Dos: Create an action item for an account, contact, or opportunity. Information is in the Activity tab.

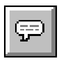
Notes: Create a note for an account, contact, or opportunity. Information is in the Activity tab.

Interaction: Record notes about your contact.

If the Navigator is the active window, the following additional buttons appear:



Switch Responsibility: Display the Responsibilities window.



Switch Language: Display the Choose Language window to view menus, forms and messages in another language. This feature is not yet available in Oracle Sales and Marketing.

Using List of Values

Some fields have predefined *list of values* that you can choose from. You can tell by the message <List> that appears on the status line when you move your cursor into one of these fields.

▶ **To use list of values:**

1. Place the cursor in the required field.
2. Choose the List of Values (LOV) button on the toolbar. You can also choose List of Values from the Edit menu or press the F9 key.

   A window appears displaying a list of possible entries for the field. The window title displays the field name.
3. Select an entry from the LOV and choose OK.

   The window closes and the field displays the selected value.
4. If a field has a long list of values (typically, more than 25), a window entitled *Enter Reduction Criteria for Long–List* appears. Enter the first few characters that occur in your value to display a short list of values.

Note: The partial value you enter can also include wildcard characters. If you have to view the entire list, enter % at the prompt to display all the values.

Keyboard Shortcuts

Experienced users can bypass the menu or toolbar by using a *keyboard shortcut*, a specific combination of keystrokes that performs the same function as a corresponding menu item. For example, you can view a list of values by pressing the F9 key. Some of the more frequently used keyboard shortcuts are:

Key	Description
TAB	Next Field
F1	Help
F6	Insert Record
F7	Enter Query
F8	Execute Query
F9	List of Values
F10	Save
Shift + F4	Clear Record
Shift + F6	Delete Record
Ctrl + u	Clear Item
Ctrl + q	Exit Application
Ctrl + F1	Show Key Mapping
Ctrl + F4	Close Current Window
Ctrl + F6	Switch windows from front to back
Alt + a	Action Menu
Alt + e	Edit Menu
Alt + g	Go Menu
Alt + q	Query Menu
Alt + f	Folder Menu
Alt + t	Tools Menu
Alt + h	Help Menu

Table 1 – 1 Frequently Used Application Keys (Page 1 of 1)

Key	Description
Alt + u	Account Tab
Alt + c	Contact Tab
Alt + o	Opportunity Tab
Alt + y	Activity Tab
Alt + r	Forecast Tab
Alt + l	Collateral Tab
Alt + p	Script Tab
Alt + v	Event Tab
Alt + t	Quote Tab

Table 1 – 2 Frequently Used Keys in Workbench (Page 1 of 1)

▶ To display the list of keyboard shortcuts:

1. Choose Show Keys from the Help menu.
2. When you finish scrolling through the listing, choose OK to close the window.

Search Tools

Sales and Marketing provides three powerful tools to search for information: Query Enter, Query Run, and Fuzzy Find.

Searching for Records

Many modules in Oracle Sales and Marketing such as Account, Contact, and Opportunities, provide you with a Find window that you can use to enter search criteria for locating specific information. When a Find window is not available, use Query Enter and Query Run from the menu to search for information.

▶ **To use Query Enter and Query Run:**

1. Open the window in which you want to search for information.
2. Choose Enter from the Query menu.
3. Enter search criteria.

   You can enter search criteria in any field. You can enter specific values to find exact matches, wildcard characters % to find matches that satisfy a pattern, or use query operators to find a specific range of values. Refer to the *Oracle Applications User's Guide* for additional details.
4. Choose Run from the Query menu to run the query.
5. Use the up and down arrow keys to review the retrieved records.

   If no records are found, try entering less restrictive search criteria.

Using Fuzzy Find

Fuzzy Find is a tool that lets you keep data duplication to a minimum, ensuring that you and your team members are using the same records to represent your accounts, contacts, and opportunities.

Fuzzy Find accomplishes this in several ways by:

- Starting a narrow search based on your criteria and if nothing is found, continuing automatically to search for information that might lead you to the correct account or company.
- Using replacement rules to find related names.

  For example, retrieving Robert, Bob, Rob, and Bobby when you search for Robert.
- Ignoring all case and punctuation.

Oracle Sales and Marketing lets you construct a search using whatever information you know about an account or contact. However, if you know some key information about the contact or account, you can construct more efficient searches.

▶ **To search for contacts:**

In the Contact region:

■ Enter the Contact Number *or*

■ Enter contact's Last Name, First Name, and in the Account region, enter 2 to 5 characters of the Company Name

▶ **To search for accounts:**

In the Account region:

■ Enter the Account Code *or*

■ Enter 2 to 5 characters of the Company Name, and either the Postal Code or City

What Fuzzy Find Does

Fuzzy Find runs through a series of queries to find the best result. When it finds any matches it stops and displays the results. It does not continue to the next query after finding the match. The queries, in order, are:

Query 1

Searches for a matching contact at one of your key accounts.

Query 2

Searches for a matching contact at one of your non–key accounts.

Query 3

Searches for a matching key account.

Query 4:

Searches for a matching non–key account.

Query 5

Searches for a matching company.

How Fuzzy Find Uses Replacement Rules

Oracle Sales and Marketing uses table–driven rules to enlarge the scope of your search to include synonymous names and to ignore case and punctuation. However, uppercase will query first from A to Z and lowercase will query from a to z. The replacement rules are in effect for all the query steps described above.

The replacement rules affect the following fields:

Contact First Name

For example:

If you enter Robert, Fuzzy Find retrieves Robert, Rob, Bob, Bobby, Robby, and Robin.

If you enter James, Fuzzy Find retrieves James, Jake, Jim, and Jimmy.

If you enter Debbie, Fuzzy Find retrieves Debbie, Deborah, Debra, and Debora.

Company Name

For example:

If you enter Incorporated, Fuzzy Find retrieves Incorporated and Inc.

Address

For example:

If you enter Tpke, Fuzzy Find retrieves Tpke, Turnpike, and Turnpk.

If you enter Seventh, Fuzzy Find retrieves Seventh, Seven, 7, and 7th.

Setting Up Your Connected Client

Changing Your Serial Port/Modem Connection

If your PC has dedicated serial ports, you may have to change your serial port designation to attach to a modem. Within the Oracle Sales and Marketing software you must also designate the modem port you are using. You can choose COM1, COM2, COM3 or COM4, depending on which serial port is assigned to your modem.

▶ **To change your designated serial port:**

1. Select Personal Profile from the Navigator.
2. Query on OSM:%.
3. Choose the Modem Serial Port User Value profile option.
4. Choose the correct serial port from list of values.

Setting a Prefix for Automatic Dialing

If you have a prefix that you always dial to reach an outside line, or that you always use to dial long distance, enter the prefix as a profile option. For example, if you customarily dial 9– to get an outside line, and 1– for long distance connection, enter those prefixes as the User Value in the Autodial Phone Number Prefix profile option.

▶ **To enter a prefix for automatic dialing:**

1. Select Personal Profile from the Navigator.
2. Query on OSM:%.
3. Choose the Autodial Phone Number Prefix User Value profile option.
4. Enter the appropriate prefix.

Sales and Marketing Profile Options

Profile Option Name	Default value	Profile Setting				User can update?	User can see?
		Site	Appl	Resp	User		
OSM: Access Privilege	*Territory*	✓			✓		
OSM: Account Phone Type	*General*	✓					
OSM: Address Key Index	*1*	✓					
OSM: Address Key Length	*15*	✓					
OSM: Address Label 1	*Address*	✓					
OSM: Address Label 2		✓					
OSM: Address Label 3		✓					
OSM: Address Label 4		✓					
OSM: Advertisement Code System Flag	*Yes*	✓					
OSM: Allow update of non–marketing account address	*No*	✓	✓	✓	✓		✓
OSM: Amount Scaling		✓					
OSM: Autodial Phone Number Prefix		✓			✓	✓	✓
OSM: Blitz Code System Flag	*Yes*	✓					
OSM: Change Customer Relationship				✓			
OSM: Collateral Category		✓			✓	✓	✓
OSM: Collateral Code System Flag	*Yes*	✓					
OSM: Collateral Fulfillment Method		✓					
OSM: Collateral Letter		✓		✓	✓	✓	✓
OSM: Collateral Orders To Process	*10*	✓					
OSM: Collateral Organization		✓		✓	✓	✓	✓
OSM: Contact Phone Type	*General*	✓				✓	✓
OSM: Country	*United States*	✓			✓	✓	✓
OSM: Currency Code	*US dollar*	✓		✓	✓	✓	✓

Table 1 – 3 Profile Options (Page 1 of 5)

Profile Option Name	Default value	Profile Setting				User can update?	User can see?
		Site	Appl	Resp	User		
OSM: Current Environment Administrator					✓		
OSM: Customer Key Word Count	*4*	✓					
OSM: Debug	*No*	✓				✓	✓
OSM: Display Total Amount, Environment Tab		✓					
OSM: Display Total User_Def_Num1, Environment Tab	*Yes*	✓					
OSM: Enable Customer Form Navigation	*No*	✓			✓		
OSM: Enable MS+ Schedule Integration	*No*	✓			✓	✓	✓
OSM: Event Administrator					✓		✓
OSM: Event Code System Flag	*Yes*	✓					
OSM: Event Facility Code System Flag	*Yes*	✓					
OSM: Forecast Calendar		✓					
OSM: Forecast Current Freeze Period		✓					✓
OSM: Forecast Forecast Confidence		✓					
OSM: Forecast Freezing Enabled	*No*	✓					
OSM: Forecast Price List		✓					
OSM: Forecast Price Volume Margin		✓	✓	✓	✓		
OSM: Forecast Rolling Calendar Periods		✓					✓
OSM: Forecast Upside Confidence		✓					
OSM: Freight Carrier		✓					✓
OSM: Freight Carrier Source		✓					✓
OSM: Generate Opportunity System Notes	*Yes*	✓					
OSM: Initial Workbench Region	*ToDos*	✓	✓	✓	✓	✓	✓

Table 1 – 3 Profile Options (Page 2 of 5)

Profile Option Name	Default value	Profile Setting				User can update?	User can see?
		Site	Appl	Resp	User		
OSM: Language	*United States*	✓			✓	✓	✓
OSM: Letter Code System Flag	*Yes*	✓					
OSM: Letter Date Format	*Month Day, Year*	✓		✓	✓	✓	✓
OSM: Mail Response First Navigation CUSTOMER_NAME Field		✓			✓	✓	✓
OSM: Make Job Title Code Required	*No*	✓					✓
OSM: Managing Employee Has Access	*Yes*	✓					
OSM: Max Number of Collateral Items	*100*	✓		✓	✓		✓
OSM: Maximum Client Number	*5,000*	✓					✓
OSM: Modem Serial Port		✓			✓	✓	✓
OSM: No Opportunity Ceiling		✓		✓			
OSM: Notes Update Day Range	*1*	✓					✓
OSM: Notification Date							
OSM: Opportunity Adjustment Filter		✓		✓	✓		✓
OSM: Opportunity Competitor Entry	*Free Text*	✓					
OSM: Opportunity Delete Ceiling		✓		✓			
OSM: Opportunity Issue Entry	*Free Text*	✓					
OSM: Opportunity Probability Link	*Warning*	✓					
OSM: Opportunity Status Override	*Yes*	✓					
OSM: Order Entry Collateral Order Source		✓					
OSM: Order Entry Collateral Order Type		✓		✓			
OSM: Postal Code Key Length	*10*	✓					
OSM: Product Organization		✓		✓	✓	✓	✓

Table 1 – 3 Profile Options (Page 3 of 5)

Profile Option Name	Default value	Profile Setting				User can update?	User can see?
		Site	Appl	Resp	User		
OSM: Program Code System Flag	*Yes*	✓					
OSM:Quote Automatic Numbering	*No*	✓		✓	✓		
OSM: Quote Discount Privilege	*None*	✓		✓	✓		✓
OSM: Quote Duration	*30*	✓		✓	✓	✓	✓
OSM: Quote GSA Check	*Warning*	✓		✓	✓		✓
OSM: Quote Letter		✓		✓	✓	✓	✓
OSM: Quote Order Entered State	*15*	✓		✓	✓		✓
OSM: Quote Order Source		✓			✓		
OSM: Quote Order Type		✓		✓	✓		✓
OSM: Quote Organization		✓		✓	✓	✓	✓
OSM: Quote Use Order Entry	*Yes*	✓			✓		
OSM: Quote Use Receivables Tax	*Yes*	✓			✓		
OSM: Re–Evaluation Lookahead Interval		✓			✓	✓	✓
OSM: Script Code System Flag	*Yes*	✓					
OSM: Script Records to Process	*10*	✓					
OSM: Site Use	*Market*	✓	✓	✓	✓	✓	✓
OSM: Territory Minimum Number of Records for Parallel Processing	*100*	✓					
OSM: Territory Number of Child Processes	*1*	✓					
OSM: Territory Records to Process	*10*	✓					
OSM: Time Format	*AM/PM format*	✓		✓	✓	✓	✓
OSM: Time Zone	*–08.00*	✓					
OSM: Turn Prospect into Customer at Order Time	*Yes*	✓					
OSM: Use Customer Keys	*Yes*	✓					
OSM: Use Inventory Items	*Yes*	✓					

Table 1 – 3 Profile Options (Page 4 of 5)

Profile Option Name	Default value	Profile Setting				User can update?	User can see?
		Site	Appl	Resp	User		
OSM: Volume Forecasting Enabled	*No*	✓					
OSM: Word Processor		✓		✓	✓	✓	✓

Table 1 – 3 Profile Options (Page 5 of 5)

Oracle Sales and Marketing Terminology

Before using Sales and Marketing, you should familiarize yourself with specific terminology used throughout this user's guide. In doing so, you will find it easier to move through the system and to retrieve the information you need. These terms are defined below:

Company: Represents an enterprise with whom you are conducting business, such as a corporation, a school district, or a city. A company has a unique number associated with it called the company number.

Customer: Represents a company that, at some time, has placed an order with your enterprise.

Prospect: Represents a company that has not yet placed an order with your enterprise.

Account: Represents a company at a single address. You can have many accounts within one company, each having a different address.

For example, three accounts for Technology Inc. (the company) might be:

Technology Inc.
123 Technology Drive
Santa Clara, CA

Technology Inc.
14352 Via Del Mar
San Diego, CA

Technology Inc.
7300 Commerce Court
Boston, MA

If any of the above accounts have placed an order with company XYZ, then Technology Inc. is a customer. If none of the Technology Inc. accounts have placed an order with company XYZ, then Technology Inc. is a prospect.

CHAPTER

2

Setting Up and Managing Accounts

This chapter describes how to manage your account information using Oracle Sales and Marketing. You will find that the file folder tabs let you quickly page through all the account management functions.

The following topic is included:

The following tasks are included:

Finding an Account

If you have a large database of account information, you may find it difficult to locate account information particularly if you have a variety of account locations and subsidiaries. Oracle Sales and Marketing offers a "fuzzy logic" feature that lets you enter partial information; the database is searched for information that closely matches that partial information.

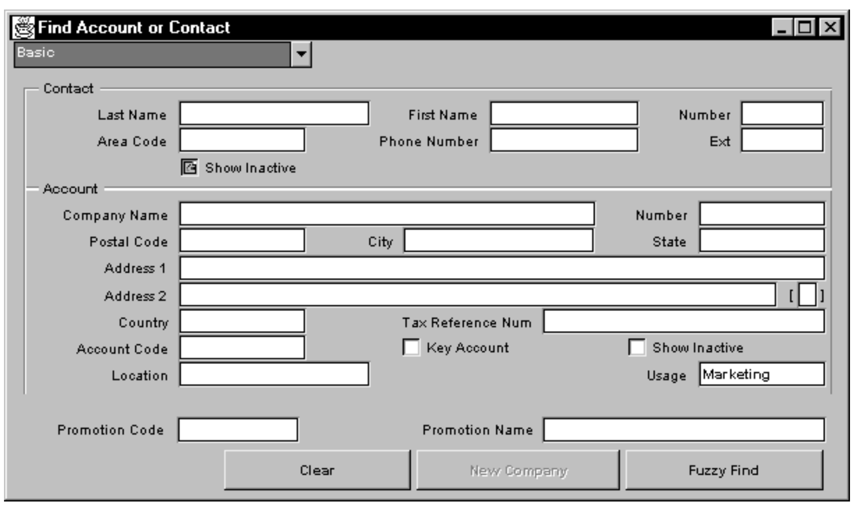
You can locate and view an account by entering any combination of company name or address information. You can enter partial or complete account or contact names to locate information.

The Find Account or Contact window offers two levels of search capability:

- The Basic Find Account or Contact window, which lets you search for specific account or contact information.
- The Advanced Find Account or Contact window, which lets you search for information regarding sales team, partner information, or relationship.

Using the Basic Search Window

The Basic Find Account or Contact search window lets you search for your account and contact information using key information such as name and address.



▶ **To find a specific account using the basic search window:**

1. Select the Account or Contact tab within the Workbench.
2. Choose the Find button on the toolbar.
3. Enter search criteria in the Account region.
4. You can enter any other information to narrow the search such as:

   Number: An OSM system–generated number that uniquely identifies a customer or prospect.

   Account Code: An OSM system–generated number that uniquely identifies an account.

   Location: A code that uniquely identifies an address and its usage.

   Usage: Indicates the purpose of this address, such as *Bill To* or *Ship To.*

5. Uncheck the Key Account check box if you want the search to include all your accounts.

   The Key Account check box limits the account search to those accounts you have designated as key.

6. Check the Show Inactive check box to retrieve inactive accounts.
7. Choose Fuzzy Find.

▶ **If you cannot find your account:**

- Perform another search using less restrictive criteria.

  For example, try entering fewer characters of the company name or uncheck the Key Account check box so that the system will search all accounts in your territory.

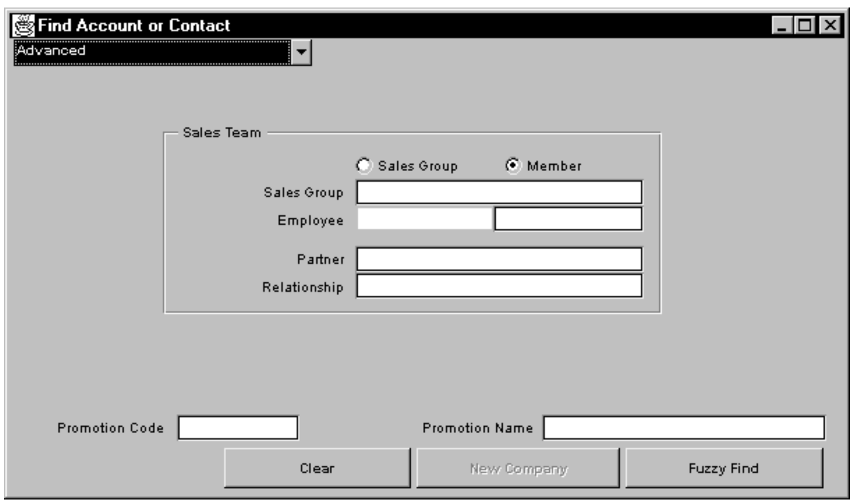
☞ **Attention:** You may not be able to locate an account because you do not have access to it. Your territory administrator determines what accounts you can access. To see all accounts you have access to, enter a % (wildcard character) in the Account field of the Find Account or Contact window; make sure all other fields are empty and choose the Fuzzy Find button. All accounts you have access to, then display in the Accounts window.

▶ **If one or more accounts are found:**

1. View the accounts matching your search criteria in the Accounts window.
   - If the account is found, examine the details to make sure it is the right account.
   - If it is the wrong account, perform another search using less restrictive criteria.
2. If the company exists, but not the specific address you are looking for, you may add it to the system.

Using the Advanced Search Window

The Advanced Find Account or Contact search window lets you further limit the criteria you entered on the Basic search window. The search strategy presumes you started with the Basic Find Account or Contact window.



▶ To use the advanced search window:

1. In the Basic Find Account or Contact search window, enter % in the Account or Contact field or enter specific information relevant to the advanced search.

   ☞ **Attention:** You must enter some search criteria on the Basic Search window to use the Advanced window.

2. In the Advanced Find Account or Contact search window, enter information in any of the following fields to limit your search:

   Sales Group: Enter the existing sales group you want to query.

   *Employee***:** Enter a specific sales team member you want to query.

   Partner: You may query by partner by entering the partner name from the list of values. (A partner must first be saved as a customer.)

   Relationship: If you are using Salesforce Relationship, you can search by that value.

Entering or Updating an Account

The Account Address window lets you enter a new account by entering its name and address.

▶ **To enter a new account:**

1. Select the Account tab.
2. Choose the Find button on the toolbar.
3. Search for the record.

☞ **Attention:** Before you enter a new account, use Fuzzy Find first to verify that the account is not already in the database.

4. After you verify that the account is not in the database, choose New Company.

   A blank Account window appears, which lets you create a new company.

   In the top portion of the Account window, the following information is shown:

   Company Name: Enter a new company name.

   Number: This is either a manually entered, or a system–generated number, depending on how your system administrator has set up your system.

   Company Comment: Enter additional information about the company.

   Account Comment: Enter additional information about the account.

   Phone: This is the main number for the account. If you have enabled the autodial feature, you may choose the Autodial button to contact the telephone number shown. Enter numbers only; the phone number is automatically formatted.

   Type: References the type of phone number shown. For example: General, Fax, and Telex.

   Account Code: This is a unique number that identifies the account. This number is either system generated or generated manually, depending on how your application was configured.

   Tax Reference Num: The company's tax reference number.

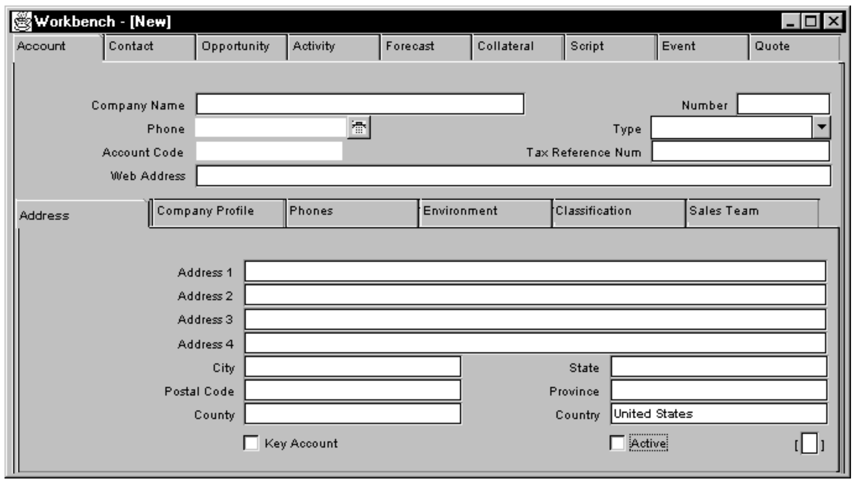
   In the Address sub tab portion of the window, the following information is shown:

Key Account: When searching for an account in the Find Account or Find Contact window with the Key Account check box checked, Oracle Sales and Marketing searches only for accounts marked as key accounts. If there is an account in your territory that you would not normally contact (such as an address that is used only for shipping or billing purposes) you would not identify that address as a key account.

See Using Fuzzy Find: page 1 – 13 for additional information.

▶ To enter a main address for an account:

1. Select the Address sub tab.



2. Enter the main address for an account.

☞ **Attention:** Do not enter address information for a particular contact here, a contact address must be entered under the Contact tab.

3. Specify if this is a Key Account. A Key Account is an account you frequently work with.

4. Check the Active check box.

   The Active check box signifies that this account is a currently active account.

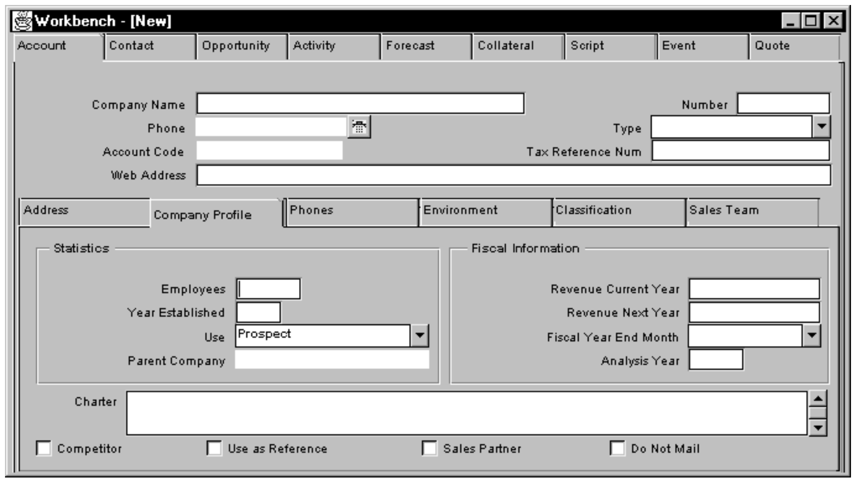
5. Choose Save on the toolbar to add the account to the database.

Entering or Updating a Company Profile

The Company Profile window lets you track data about a company such as the number of employees, fiscal data, size, and type of business.

▶ **To enter or update a company profile:**

1. Select the Company Profile sub tab.



2. Enter overview information in the Statistics region such as the number of employees, year established, and type of relationship.
3. Select the relationship you have with this account:

   Customer: This company has purchased product from you in the past.

   Prospect: This company has not purchased product from you.

   Since an account is a company at a particular address, an account can either be a prospect or a customer. If any account associated with the same company places an order with your enterprise, all accounts under that company are customers. If no account under a company has placed an order, all accounts are designated as prospects.
4. Enter financial information about this account in the Fiscal Information region.

   If you are entering an account that is a new address for an existing company, the account inherits the previously existing fiscal information from its company. You can change information for this account if it differs from the previous listing.

5. The Charter region is a free–form text field where you can enter a summary of an account's business purpose. Your enterprise may have standards for the type of information that you enter here.

6. You can further classify this account as either:

   Competitor: This account competes with your enterprise.

   Use as Reference: This account has agreed to be a reference for your product.

   Sales Partner: This account is a reseller, dealer, or other sales partner.

   Do Not Mail: If you check this check box, this account will not be included in any mail campaigns.

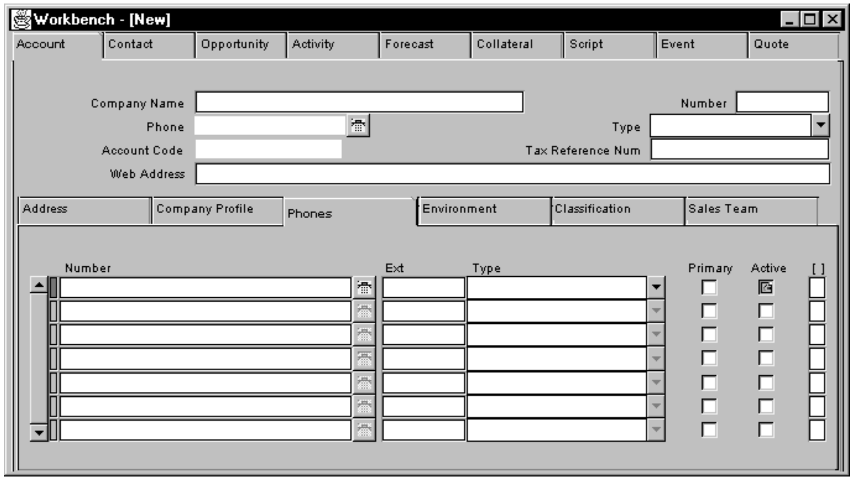
7. Choose Save on the toolbar to add the account's company profile to the database.

Entering or Updating Account Telephones

The Phones window lets you track the account's phone numbers.

▶ **To enter or update an account telephone number:**

1. Select the Phones sub tab.



2. Enter a new phone number on the first available blank line or choose the New Record button on the toolbar to insert a blank line.

   Note: Enter numbers only. Formatting is done automatically.

3. If a phone number is saved in the header information, it will automatically default to the phone's first row.
4. Enter an extension, if applicable.
5. Select a phone Type from the poplist.

   For example: Cell Phone, Fax, General, and Telex.

   Note: Your system administrator defines the list of phone types.

6. Check the Primary check box to designate a primary phone.

   The primary phone number will appear throughout when Account Summary Information is displayed.

7. Check the Active check box to designate a current number.

   If the phone number is no longer valid, uncheck the check box.

8. Choose Save on the toolbar to add the account's telephone numbers to the database.

Entering or Updating Environment Information

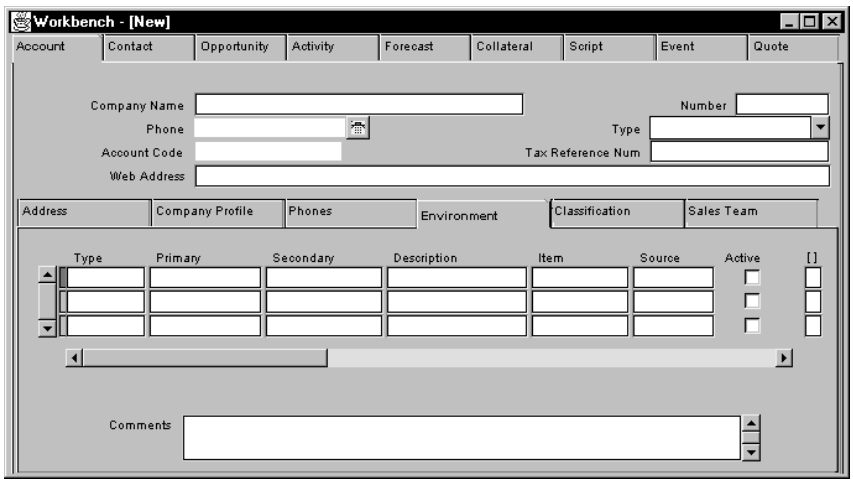
The Environment window lets you quickly and accurately review current information about the buying history and needs for an account. You can see the current inventory and pricing for items this account orders, including a history of the customers' buying behavior.

This window also lets you keep track of who has supplied product to this account, in the event you want to track competitor information.

Note: The Environmental window is a folder form, which is customized by your system administrator for the entire site.

▶ **To enter or update environment information:**

1. Select the Environment sub tab.



2. For each item you want to track, enter the following information:

   Type: This is the interest type. It can be selected from the list of values.

   Primary: The primary interest type can be chosen from the list of values.

   Secondary: The secondary interest type can be chosen from the list of values.

   Description: Describe the product.

   Item: Select the inventory item number from the list of values.

Source: If your site has set up a list of values for your alternatives, or competitors, you may select from the list of values. If your site has set up this field as a free text field, you may enter text.

Active: This check box lets you signify if this information is active or historic.

Quantity: This field refers to the on–hand quantity of this particular product.

Price: Enter the price per item.

Total: When you enter quantity and price in the appropriate fields, this field shows the total amount of the inventory.

Number 1: This is a numeric field that shows a Total field at the foot of the column when entries are made.

Number 2: This is a numeric field that is used as a *Required* entry field. If you have a number it must be entered. You may hide this field if you don't want to use it.

Number 3: This is an optional numeric field.

3. The following text fields are supplied for your customization. Enter information in the fields, if appropriate:

   Text 1: This field has a list of values if your site uses the AS_CURRENT_VALUES QuickCode lookup type.

   Text 2: This field is a required text field, if needed.

   Text 3: This is an optional text field.

   User Defined Date: As the heading implies, you can use this field for your own designation.

   Installation Date: Date when the product was first sold to the account. This field has a calendar from which you can select the date.

   Re–evaluation Date: The date when the customer should be re–contacted. This could be either to re–evaluate the product sold earlier, or for a new opportunity. This field has a calendar from which you can select the date.

4. Choose Save on the toolbar to add the account's environment to the database.

Entering or Updating Classifications

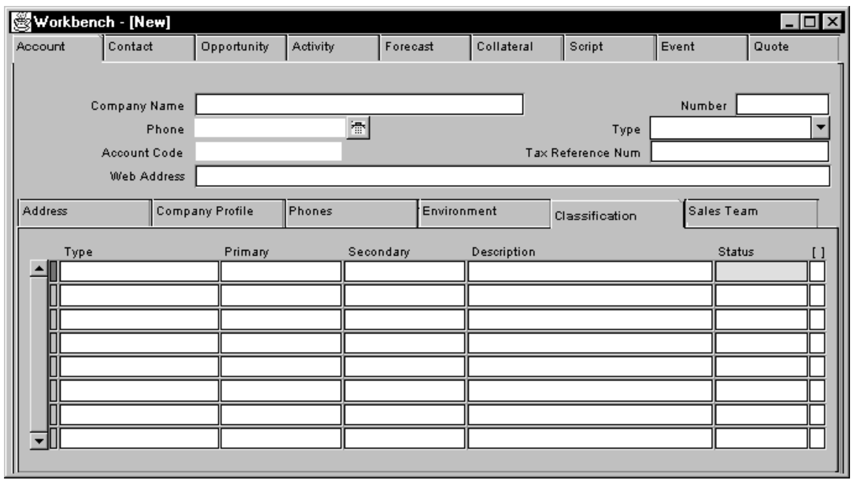
The Classification window helps you organize your accounts into a logical arrangement as defined by your system implementation team.

There is a hierarchy to account classifications. Type is the highest level followed by primary code and secondary code. The list of values available from each field comes from your account classification. The classification is set up by your implementation team. The information is specific to your organization's product and customers.

You can update account classifications at any time. The date of the change is automatically recorded in the Entry Date field.

▶ **To enter or update account classifications:**

1. Select the Classification sub tab.



2. Select a type from the list of values.

   An example of a type is a *sector*, or if you are dealing in machines, it could be *hardware*. This classification type could also be an SIC code.

3. Select a primary code from the list of values.

   The primary code further describes the interest type. To continue the above example, the type *sector* might have three primary codes: *commercial*, *federal*, and *public*.

4. Select a secondary code from the list of values.

The secondary code further describes the primary code. For example, if the primary code is public, three possible secondary codes are *university*, *county government*, and *city government*.

5. Enter a description (optional).

   Description is a free field. You may enter up to 250 characters.

6. Enter a status.

   The status is in context to your organization and is set up by your implementation team.

7. Choose Save on the toolbar to add the account's classification information to the database.

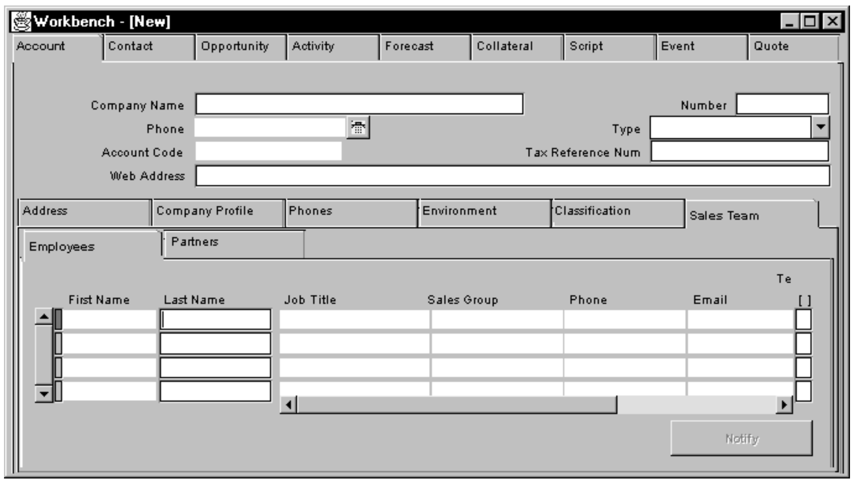
Updating or Viewing a Sales Team

The Sales team window lets view and update all salespeople and business partners assigned to this account. If you are using the Territory Assignment program, the account sales team will automatically be created the next time the program runs.

You can also assign the sales team manually (or manually add someone to the sales team after the territory assignment program has been run).

▶ **To update or view sales team information:**

1. Select the Employees sub tab.



   The Employees sub tab shows all employees with access to the displayed account.

2. In the Employees sub tab, position your cursor in the first blank line or choose New Record on the toolbar to insert a blank line.

3. Select an employee's name from the list of values.

4. Select the Partners sub tab.

   The Partners sub tab shows all partners with access to the displayed account.

5. Enter the company name in the Partner field from the list of values.

   If there is an employee of your enterprise who manages the partner relationship, the employee's name appears in the Managing Employee field of the Partners window.

6. When you manually assign a partner to a sales team, and check the Keep check box, the Territory Assignment program regards the entry as permanent and will not remove it.
7. Choose Save on the toolbar to add the account's sales team to the database.

CHAPTER

3

Working with Contacts

This chapter describes how to use Oracle Sales and Marketing to manage your database of contacts.

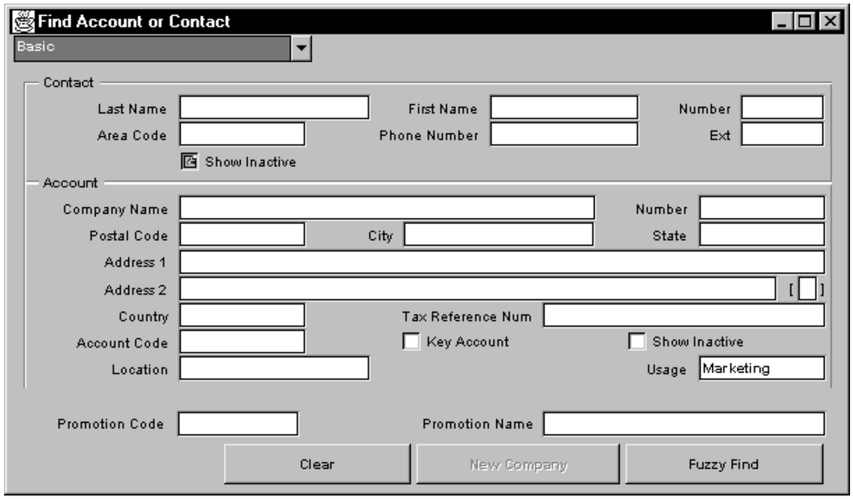
The following topic is included:

The following tasks are included:

Finding and Viewing Contact Information

You can locate and view contact information through the Find Account or Contact window.

▶ **To find and view contact information:**



1. Enter a contact name or phone number in the Contact region.

   You can also enter information in the Account region to help you narrow your search.

2. Choose Fuzzy Find.

   Fuzzy Find searches for a match based on your criteria. For example:

   - If you entered John Doe at Technology Inc. in Dallas, Fuzzy Find searches for John Doe at Technology Inc. in Dallas.
   - If no records are found, it continues to search for Technology Inc. in Dallas.
   - If still no records found, Fuzzy Find searches for Technology Inc.

▶ **If you cannot find your contact:**

1. Perform another search using less restrictive criteria.

   For example, enter fewer characters of the company name or enter fewer characters of the last name.

2. If you entered a contact name only and your query was unsuccessful, enter the name of the account with which this contact is associated. From the Search Results window, choose the Contacts button to view a list of all contacts at the account.

☞ **Attention:** You may not be able to locate a contact because it belongs to an account you do not have access to. Your territory administrator determines what accounts you can access. To see all contacts you have access to, enter a % (wildcard character) in the Contact Last Name field of the Find Account or Contact window; make sure all other fields are empty and choose the Fuzzy Find button.

▶ **If one or more contacts are found:**

1. View the contacts matching your search criteria in the Contacts window.

   - If only one contact is found, a detail window opens.
   - If several contacts are found, the Search Results window opens. You can scroll up and down or left and right within this window to view a summary of contact information. Select a specific contact and drill down to view or update detailed information about the contact.

2. If the contact you are looking for is not listed, add it by closing the window and entering it on the Contact's tab.

Note: The Advanced Search window lets you search for a contact in context to a sales team.

For more information on the Advanced Search window, see Using the Advanced Search Window: page 2 – 4.

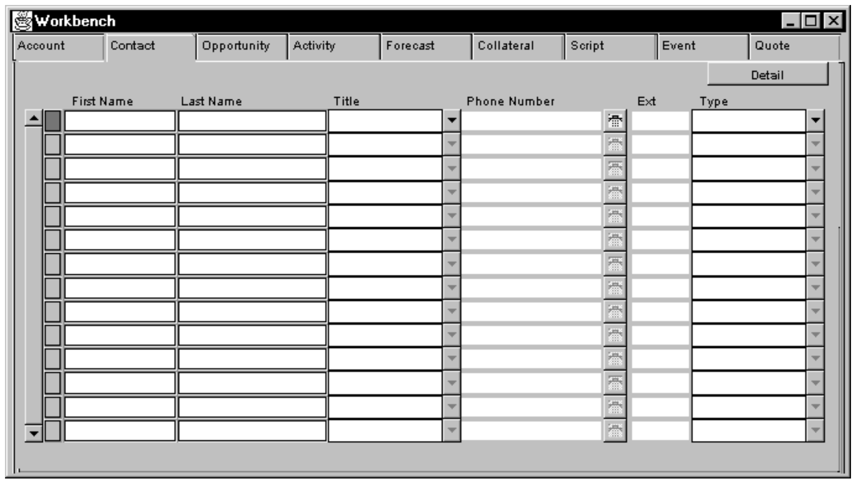
☞ **Attention:** You may not be able to locate a contact because it belongs to an account you do not have access to. Your territory administrator determines what accounts you can access. To see all contacts you have access to, enter a % (wildcard character) in the Contact Last Name field of the Find Contacts window; make sure all other fields are empty and choose the Find button on the toolbar.

Entering a New Contact

A contact is always associated with a single account. An account can have many contacts. You can also use the Interests and Profile tabs to track more detail information about a contact.

You can enter a new contact from either the Contact Summary or Contact Detail window.

▶ **To enter a new contact from the Contact Summary window:**



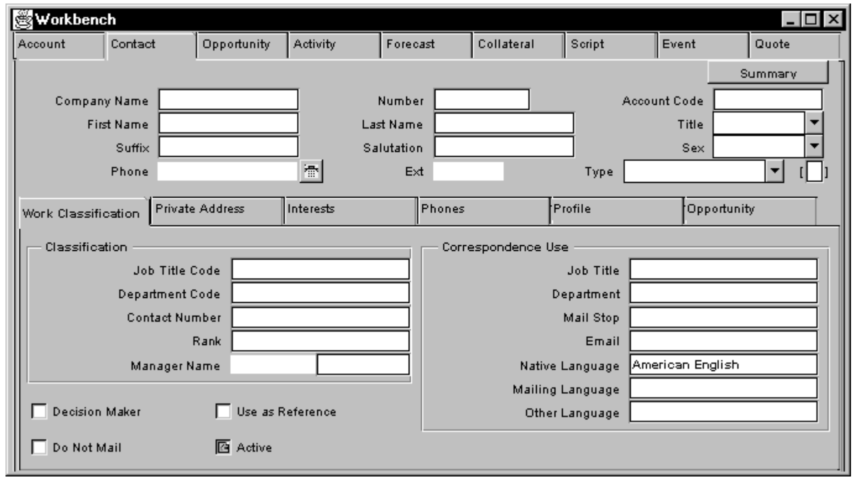
1. Enter the contact name.

   Enter the new contact on the first blank line, or select the New Record button on the toolbar, to insert a blank line in the Contacts list. Enter the basic information about a contact such as Title and Phone Number (if different from the account phone number). The company name, number and account code appears by default if this is a previously existing account.

   Suggestion: Choose Summary / Detail on the toolbar to toggle between the Contact Summary and the Contact Detail windows, or choose the Summary / Detail button on the Contact window.

2. Choose Save on the toolbar to add the contact to the database.

▶ To enter a new contact from the Contact Detail window:



1. Enter the contact name.

   Choose the New Record button on the toolbar. The previous contact information is cleared from the window. Enter the basic information about a contact such as title and phone number (if different from the account phone number). The company name, number and account code appears by default if this is a previously existing account.

   Suggestion: Choose Summary / Detail on the toolbar to toggle between the Contact Summary and the Contact Detail windows, or choose the Summary / Detail button on the Contact window.

2. Choose Save on the toolbar to add the contact to the database.

Entering and Updating a Contact's Work Classifications

For each of your contacts you can track high–level information like job title and department within the company. Oracle Sales and Marketing also gives you the flexibility to standardize job and department titles across companies using job title codes and department codes.

▶ **To enter or update a contact's work classification:**

1. Locate the contact whose record you want to update.

   See: Finding and Viewing Contact Information: page 3 – 2.

2. In the Classification region, select a job title code and department code.

   Use the list of values to locate a predefined code for both job title code and department code. As you select a job title or department code, their descriptions become the default values in the Correspondence Use region.

3. In the Correspondence Use region, enter the contact's actual job title and department name.

   Enter this information, exactly as you would want it to appear on a mailing label. For example, your internal job classification of a contact may be abbreviated to CEO, but when you correspond with the contact, they may prefer to be addressed as Chief Executive Officer.

4. Assign a rank to the contact.

   Rank the contact as to their relative perceived value to your sales efforts. Values are determined by your implementation team.

5. In the Correspondence Use region, enter a contact's mail stop, E–mail address, native language, and any other languages the contact speaks.

6. Enter the name of this contact's manager (optional).

   This information is used to build the contact hierarchy in the Account Detail window to provide information about the internal structure of account decision making. It is a list of values of the other contacts at the account.

7. Check any of the following check boxes to further classify this contact:

   Decision Maker: This contact has the authority to make a decision regarding a purchase.

Use as Reference: This contact can be used as a reference to other prospects.

Do Not Mail: Exclude this contact from promotional mailings

Active: This is a contact with whom you are currently working.

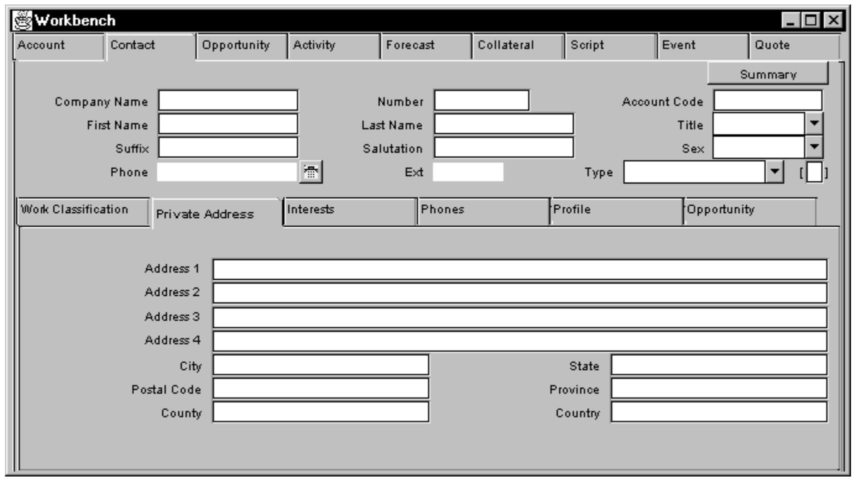
8. Choose Save on the toolbar to add the contact's work classification to the database.

Entering or Updating a Contact's Private Mailing Address

If a contact would like to receive correspondence from your enterprise at an address different from the account address, enter that address in the Private Address window. This address information overrides the account address information for mailings.

▶ **To enter or update a private mailing address:**

1. Select the Private Address sub tab.



2. Enter the contact's complete address information.

   Note: If a contact's mailing address is the same as the account address but needs an additional identifier, such as a mail stop number, enter that information in the Work Classifications window.

3. Choose Save on the toolbar to add the contact's address information to the database.

Entering or Updating a Contact's Interests

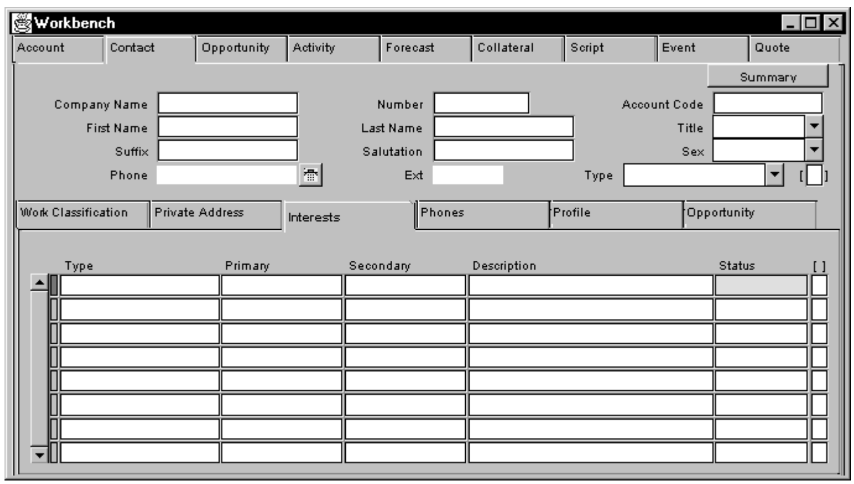
The Interests window lets you record the business interests of a contact as they relate to your company. These may be products or product lines, specific technologies, or any unique offering your company may have.

Like the account classifications, interest type is the largest category, with a primary code and secondary code subordinate to the interest type. Your implementation team defined these lists when they set up Oracle Sales and Marketing.

You can update a contact's interests at any time. The date of the change is automatically recorded in the Entry Date field.

▶ **To enter or update contact interests:**

1. Select the Interests sub tab.



2. Select a type from the list of values.

   For example: *Business Application Software.*

3. Select a primary code from the list of values.

   The primary code further describes the interest type.

   For example, the interest type *Computing Services* might have two primary codes: *Applications Implementation* and *Custom Develop.*

4. Select a secondary code from the list of values.

The secondary code further describes the primary code. For example, if the primary code is *Applications Implementation*, then two possible secondary codes are *Payroll* and *Benefits*.

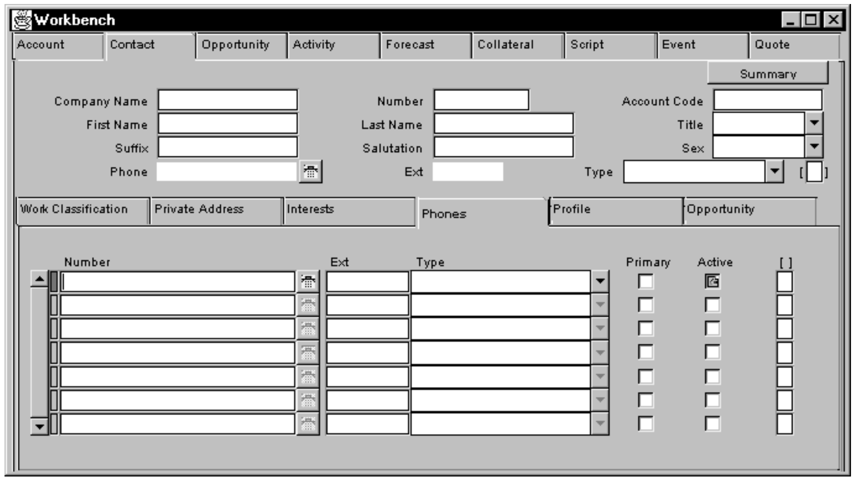
5. Choose Save on the toolbar to add the contact's business interests to the database.

Entering or Updating a Contact's Phone List

The Phones window lets you maintain a list of a contact's various phone numbers.

▶ **To enter or update a contact's phone list:**

1. Select the Phones sub tab.



2. Locate the contact and drill down to the Contact Detail window.
3. Enter a new phone number on the first available blank line or choose the New Record button on the toolbar to insert a blank line.

   Note: Enter numbers only. Formatting is done automatically.

4. If a phone number is saved in the header information, it will automatically default to the phone's first row.
5. Enter an extension, if applicable.
6. Select a phone type from the poplist.

   For example: Cell Phone, Fax, General, and Telex.

   Note: Your system administrator defines the list of phone types.

7. Check the Primary check box to designate a primary phone.

   The primary phone number will appear throughout when Account Summary Information is displayed.

Attention: There can only be one primary phone for each contact. Before you select a new primary phone, you must first uncheck the old primary check box.

8. Check the Active check box to designate a current number.

   If the phone number is no longer valid, uncheck the check box.

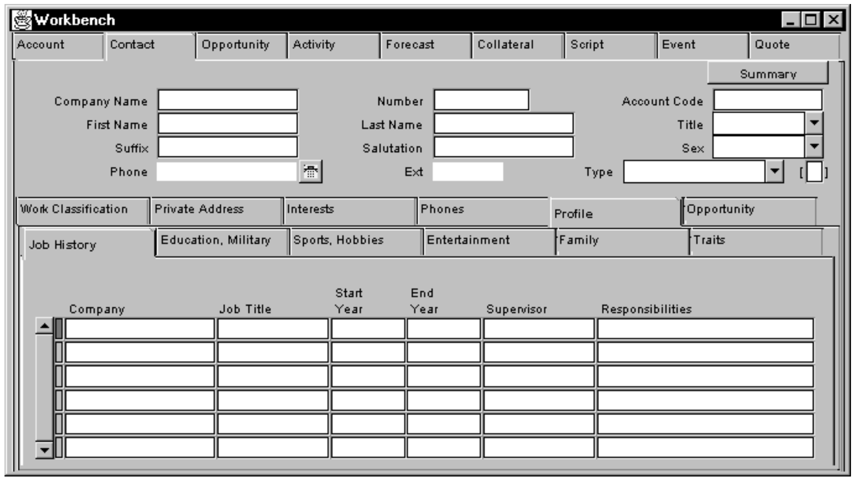
9. Choose Save on the toolbar to add the contact's telephone numbers to the database.

Entering or Updating a Contact's Personal Profile

The Profile window contains a number of tabs to help you develop and maintain a personal profile for each contact. Depending on your personal and business needs, you may or may not use this section.

▶ **To enter or update a contact's job history:**

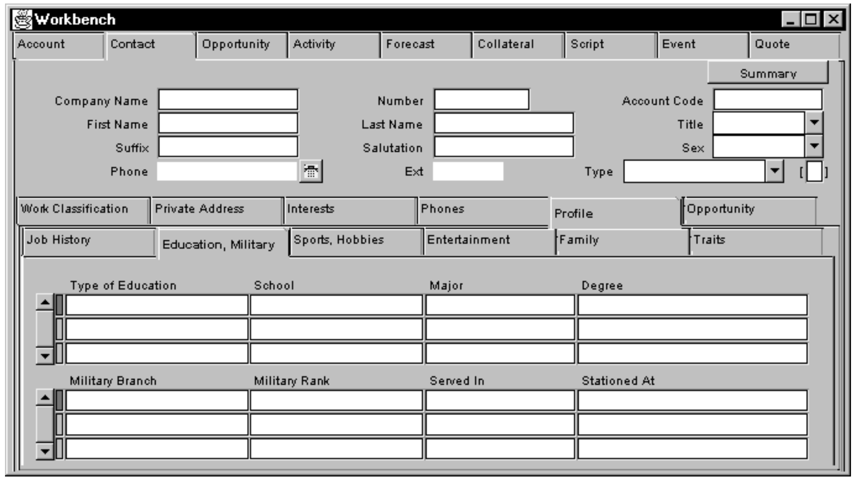
1. Select the Job History sub tab.



2. Record the job history of a contact. You can record the company name, job title, start and end dates, supervisor, and responsibilities.

▶ **To view or record a contact's education and military history:**

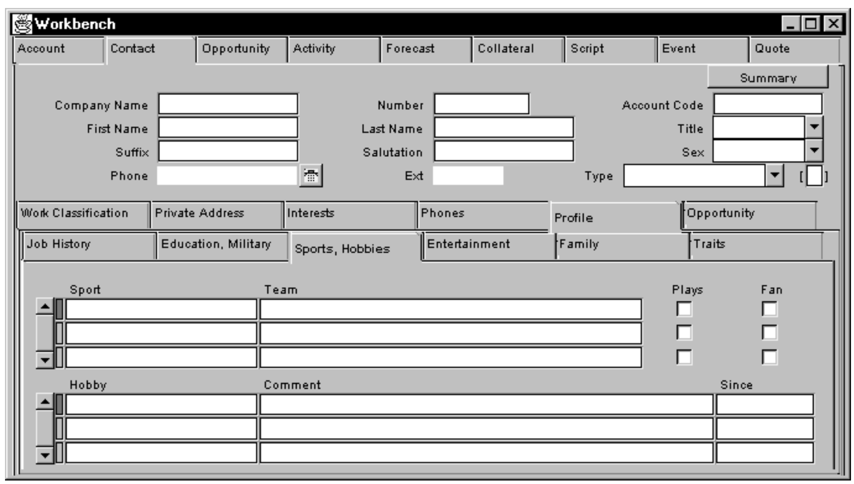
1. Select the Education, Military sub tab.



2. View or record an overview of a contact's education and military service.

▶ **To view a contact's sports and hobby preferences:**

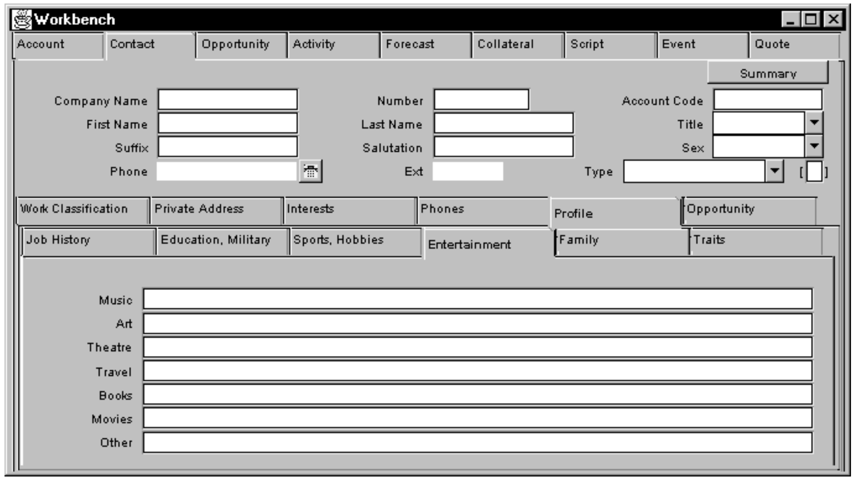
1. Select the Sports, Hobbies sub tab.



2. List the sports and hobby interests of a contact. Check the appropriate box to show whether the contact plays, or is a fan of a particular sport or team.

▶ To view a contact's entertainment preferences:

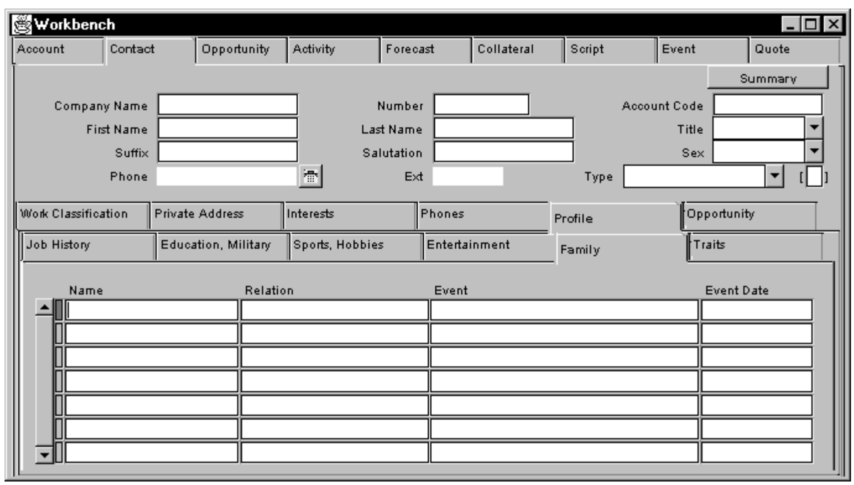
1. Select the Entertainment sub tab.



2. Keep track of a contact's art, music, literary, and theater interests.

▶ To view a contact's family connections:

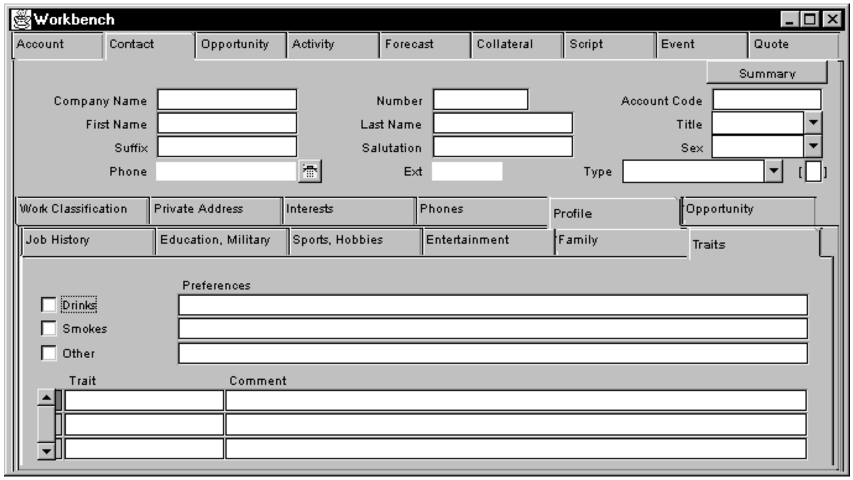
1. Select the Family sub tab.



2. Record a contact's significant family events such as birthdays and anniversaries.

▶ **To view a contact's personal traits:**

1. Select the Traits sub tab.



2. List any personal preferences or traits a contact may have. If applicable, check the boxes for smoking or drinking.

Contact Interaction

From any Contact window, you can choose the Interaction button from the toolbar to record notes about your contact. This feature is extremely useful for noting important information during telephone conversations, or can be used to gather data for other purposes. For example by:

- Entering a promotion code within the Interaction window you can track the response rate for your promotions and tally the number of actual calls.
- Choosing a script within the Interaction window, the call script is opened. You can then lead the contact through the call script.

☞ **Attention:** If you intend to use a script with an interaction note, you should go to the Interaction window *first*, then let the program open the script.

CHAPTER

4

Communicating with Contacts

Oracle Sales and Marketing gives you quick access to event scheduling and information. You can also specify and send collateral pieces, including customized cover letters to interested prospects.

Task descriptions in this chapter give you detailed information about major scheduling and mailing activities related to contacts including:

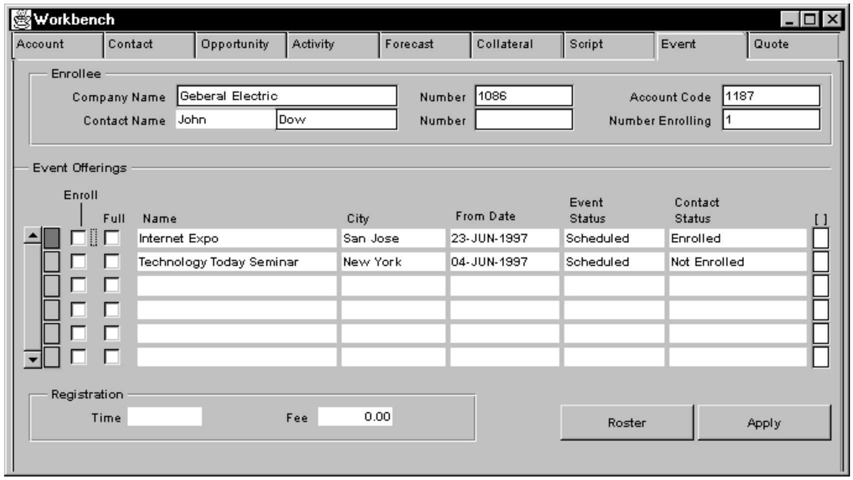
- Enrolling a Contact in an Event: page 4 – 2
- Reviewing an Event Offering Summary: page 4 – 5
- Sending a Collateral Package to a Contact: page 4 – 7

Enrolling a Contact in an Event

The Event window lets you register contacts for events.

▶ **To enroll a contact in an event:**

1. Select the Event tab.



The Find Event Offerings window appears as an overlay on the Event window.

Events related to the current contact or account you have selected appear in the Event Offerings region. To search for more options, use the Find Event Offerings window. You can search by event name, event facility, event offering, or a combination of these.

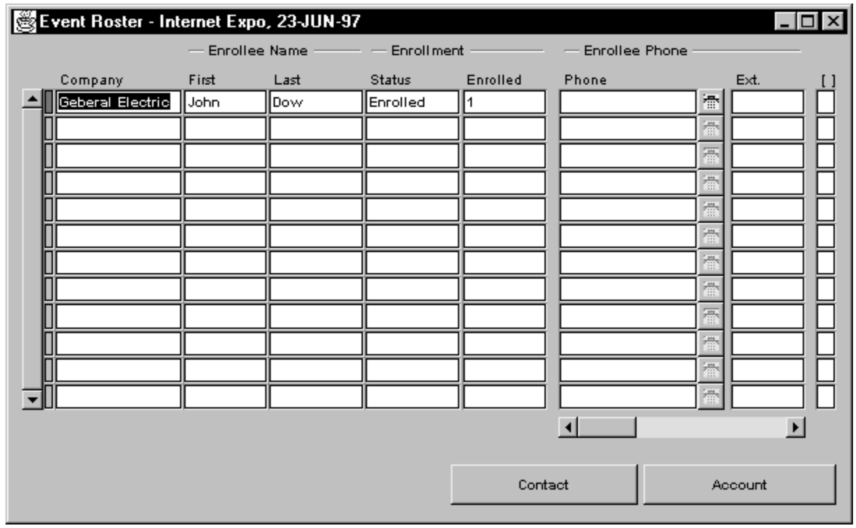
2. Enter search criteria for an event.

   You can only enroll a contact for a scheduled event.

   The Event Offerings region displays a list of offerings matching the criteria entered in the Find Event Offerings window.

   The Enrollee region displays identifying information for the selected contact.

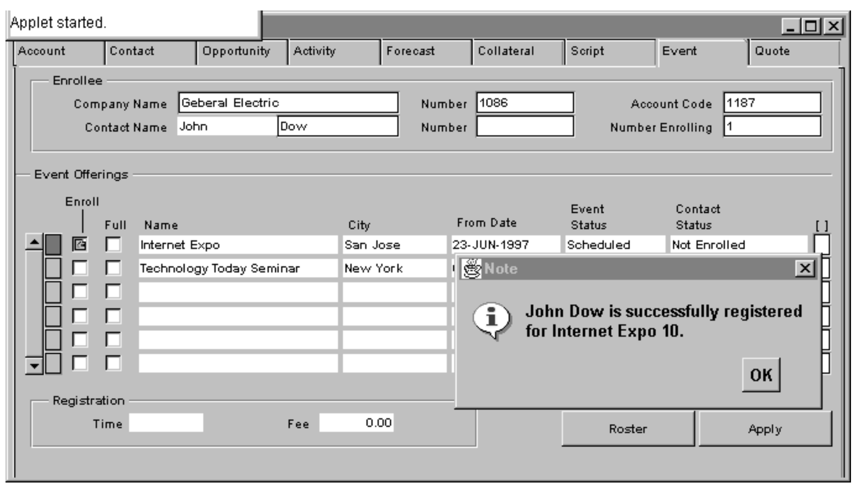
3. To register a contact for an event, check the Enroll check box next to the event. If you are enrolling more than one contact for an event, choose the Roster button and enter each name on a separate line.



4. Check the Enroll check box next to each event name for which you want to register a contact.

   If the Full check box is checked, you cannot enroll a contact, but you will be given the option of placing the contact on the wait list.

5. Choose the Apply button to save the first contact's enrollment information. You will receive a confirmation message in the Note window.



▶ **To enroll additional contacts:**

1. Place the cursor in the Contact Name field and use the list of values to select a different contact.

   The contact's identifying information appears in the Enrollee region. The event offerings information remains the same as for the last contact.

2. Check the Enroll check box to register the contact for the selected event(s).

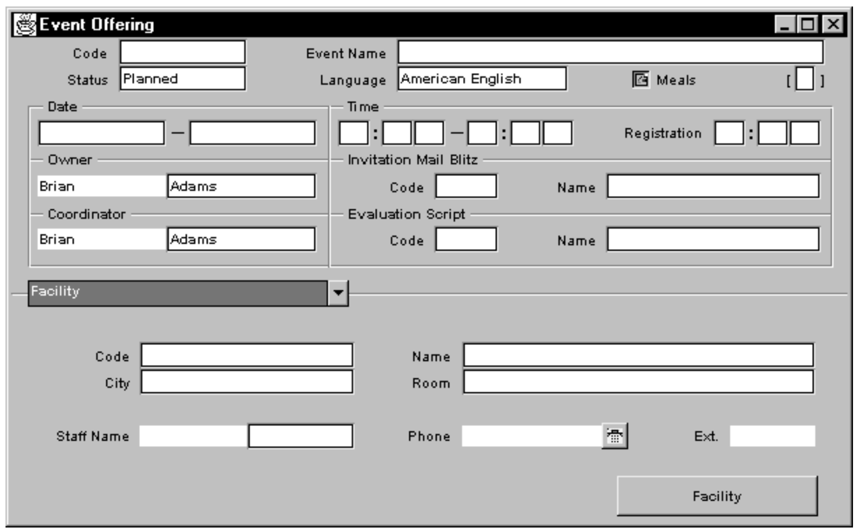
Reviewing an Event Offering Summary

The Event Offerings Summary window lets you view event offering information such as:

- Date, time, and enrollment numbers
- Facility address and directions
- Event description

▶ **To review a summary of a specific event:**

1. From the Events Enrollment window, drill down the record indicator of a selected event offering to open the Event Offerings Summary window.



This window contains information about the selected event that you might need to convey to the contact you are registering:

Status: The status of the displayed event offering. Possible values are: Cancelled, Completed, and Scheduled.

Owner: The person responsible for managing this event.

Coordinator: The onsite coordinator for the event

Enrollment Region: Contains the fee to attend, the currency denomination for the fee, the number currently enrolled in this offering, and the maximum number allowed to attend. Once the Enrolled field equals the Max Allowed field, any new enrollees are given an enrollment status of Wait Listed. The Events Administrator is responsible for maintaining the Fee and Max Allowed fields.

2. Select the Directions tab to view directions to a facility.
3. Select the Description, Information tab to view an event description and event offering information.

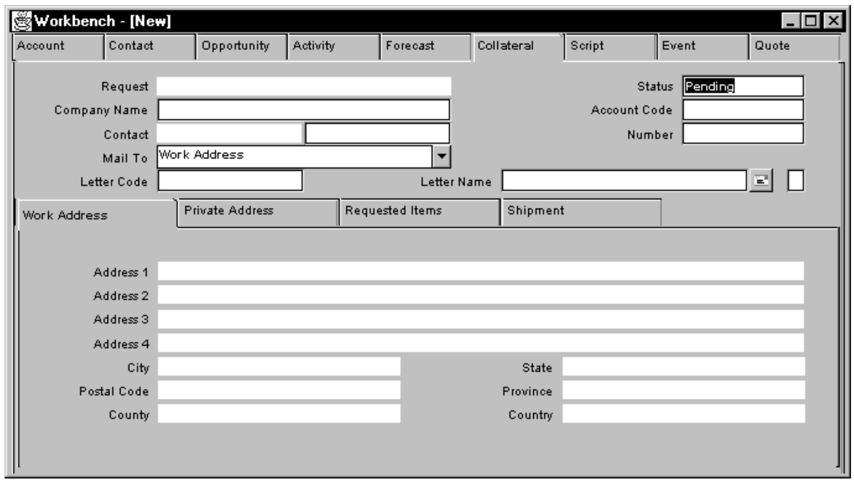
Sending a Collateral Package to a Contact

The Send Collateral window lets you send collateral to a contact with a customer cover letter.. You can print the letter locally and manually select on–hand collateral or, let the system batch the collateral package with other requests for handling by an external fulfillment house or internal shipping department.

▶ **To send a collateral package:**

1. Select the Collateral tab.

   If you were previously on a contact, the contact's information will be defaulted; otherwise, you will need to select it.



2. Select a letter code or letter name.

   The Enter Reduction Criteria for Lon... window appears.

   All collateral packages must be sent with a cover letter. Place the cursor in either the Letter Code or Letter Name field, and use the list of values to select an appropriate letter.

Suggestion: If you have a standard letter that you include with all (or most) of your collateral packages, you can have Oracle Sales and Marketing automatically fill the Letter Name and Letter Code fields by entering this information in the Personal Profile window.

Suggestion: If you want to print a letter locally, choose the Print Letter button to automatically create a merge file for the selected contact. Then, you can use the merge file function in your word processor.

3. Select a mailing address for the collateral package.

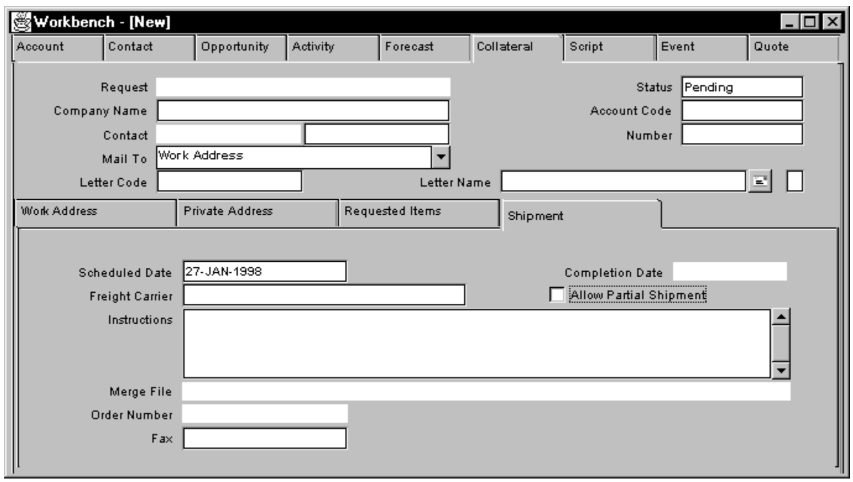
   Select either the Work Address or Private Address sub tab.

   Note: The fields in these sub tabs are identical.

   If you enter or change a private mailing address, the change is reflected when you next query the contact information.

4. Verify shipment and fax information.

   If an external fulfillment house or an internal shipping department handles collateral shipments for your company, select the Shipment sub tab to enter shipping instructions.



Scheduled Date: The date the collateral and letter are scheduled to be sent. Your system administrator may set up a default value.

Completion Date: The date the collateral and letter were sent.

Freight Carrier: The name of the company who ships the package. Your system administrator may set up a default value.

Instructions: This field lets you record any extraordinary instructions you may have for the fulfillment house or shipping department.

Merge File: When you choose the Print Letter button to print a letter locally, the merge file is automatically created and its name is recorded in the Merge File field. You need to know the name of this file when you perform the mail merge in your word processor.

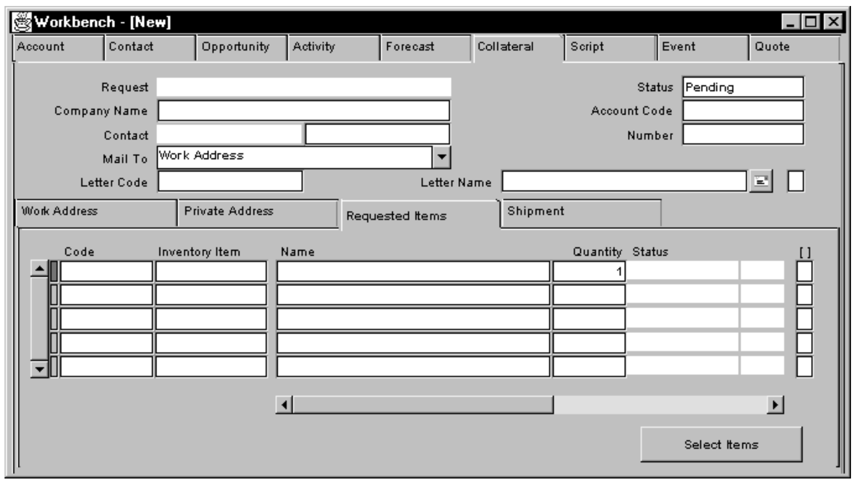
Order Number: This number is automatically assigned once your order is received by the fulfillment house or shipping department.

Fax: This field lets you fax a contact any portion of the collateral package. Select a fax number from list of values, or enter a different number in this field, as appropriate.

5. Choose Save on the toolbar to add the work address, private address, or shipment information to the database.

▶ **To request collateral items you are familiar with:**

1. Enter items directly into the Requested Items tab.



Use this method if you know the code, inventory item, or name of the item you want:

Code: A unique number assigned to each collateral item when it is entered in the system.

Inventory Item: Use only if the collateral piece is registered as an inventory item in Oracle Inventory. It is the inventoried part number of a collateral item.

Name: The title of the collateral item. For example: *Oracle7 Server Administrators Guide* or *Introduction to Oracle Materials Resource Planning*.

Quantity: The number of collateral items.

Attention: If the list of values is short, you can easily select items from the list. Your list can include both collateral kits and single collateral items.

2. Specify the quantity to order in the Quantity field. The following fields display additional information about the item:

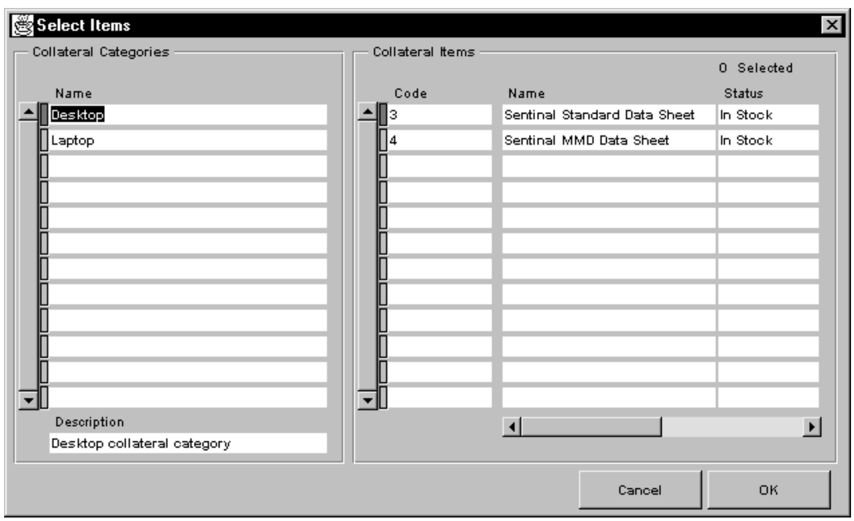
   Status: Indicates the availability of a collateral item. Possible values are: Back Ordered, Collateral Kit, In Stock, Obsolete, or Unknown. A collateral kit is a set of collateral items that are frequently sent together. The Status field is manually maintained. If your site does not want to update this field, your system administrator may choose to set Status to Unknown.

   Chargeback: Records the internal cost of a collateral item.

   Description: This field shows an abbreviated description of the collateral item.

▶ To select collateral that you do not know the name of:

1. Choose the Select Items button to open the Select Items window.



2. Select a category and choose the Collateral button to display a list of Collateral Items

   Note: Collateral items can be organized into logical groupings called categories. The Category Name column displays available categories.

The Collateral Items region displays the Collateral Code, Collateral Name, Status, Chargeback and Description fields.

3. Check the check box next to each collateral item you want to request.

   You can select items from more than one category by choosing the Category button to return to the Category Name list, selecting a new category, or choosing the Collateral button.

   > **Note:** To select an item, you must hold down the Ctrl key and the left mouse button at the same time. This method is also used to deselect an item.

4. Once all collateral items are selected, choose OK to return to the Send Collateral Package window.

   The collateral you requested is displayed in the Requested Items region.

▶ **To submit the collateral request:**

- Choose Save from the toolbar to submit your request to the fulfillment house or internal shipping department.

▶ **To leave the collateral request pending:**

1. Choose Save from the toolbar.

   The question *Is the request is ready to be submitted* to keep the status pending appears.

2. Select Yes or No.

3. If you defer a collateral shipment, choose Query Enter, enter search string, then choose Query Run, to search for the pending request when you are ready to submit a collateral request.

Suggestion: If your request is complete but you don't want the collateral items mailed today, you can still submit your request. Enter the date you want the collateral mailed in the Scheduled Date field of the Shipment sub tab. You can then submit your request but it will not be processed until the specified date.

CHAPTER

5

Managing Your Opportunities

This chapter explains how to find, enter and maintain sales opportunity information.

The following topics are included:

- Contacts Related to an Opportunity: page 5 – 14
- Credit Totals: page 5 – 15
- Opportunity Adjustments: page 5 – 18
- Finding Opportunities to Adjust: page 5 – 18

The following tasks are included:

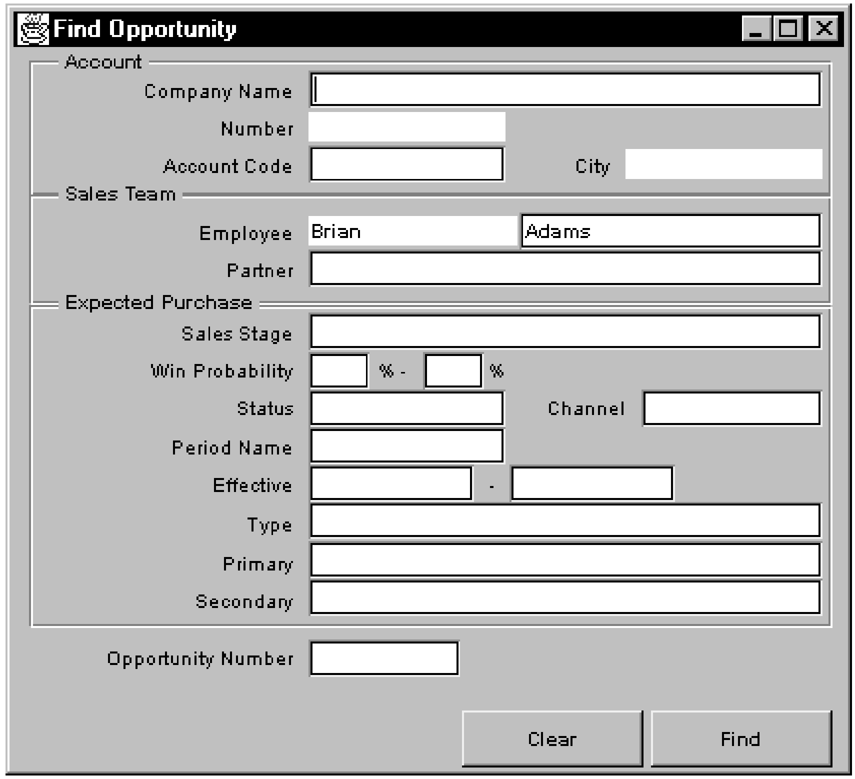
- Finding and Viewing Opportunities: page 5 – 3
- Entering or Updating a Sales Opportunity: page 5 – 6
- Entering Purchase Information for a Sales Opportunity: page 5 – 8
- Viewing Sales Credits for a Sales Team: page 5 – 10
- Tracking Obstacles to a Sale: page 5 – 11
- Entering Closing Information: page 5 – 12
- Classifying a Sales Opportunity: page 5 – 16
- Updating or Viewing a Sales Team: page 5 – 17

Finding and Viewing Opportunities

▶ **To find an opportunity:**

1. Select the Opportunity tab.

   The Find Opportunity window appears as an overlay on the Opportunity Summary window.



2. Enter the name of the prospective account, sales team, or expected purchase category.

   Attention: Whether or not you can view opportunity information for another employee depends on the access privilege you are granted (*Full Access* or *Territory Access*).

   The following terms are used in this window:

   Account Region:

   Company Name: The name of the company.

Number: This is either a manually entered, or system–generated number, depending on how your system administrator has set up your system.

Account Code: Defines an existing account.

City: If a company has several sites, enter a city to narrow the search.

Sales Team Region:

Employee: The member of the sales team for whom you would like to find sales opportunities.

Partner: A company acting on behalf of your enterprise that helps close business for you by selling your products.

Expected Purchase Region:

Sales Stage: A defined step in the sales cycle. Your company's implementation team defines permissible values based on the sales methodology employed by your sales organization.

Win Probability: The likelihood that the opportunity will close as a win by the expected close date. Your implementation team determines permissible values and links the values with an automatic change to the opportunity status. Therefore, when you change the win probability, Oracle sales and Marketing might also change the opportunity status, depending on the rules set up by your implementation team. If you enter a value here, it defaults as the win probability for all expected purchases below. You can override it for a specific expected purchase.

Status: Possible values are *Forecast, Upside, Preliminary, Partner, Won, Lost, No Opportunity,* or *Expired.*

Name: The period of time in which an opportunity is occurring. This value is chosen from a list of values and when chosen, fills in both the start and end of the period.

Effective: A date range to search within.

Type: You can search on an interest type.

Primary: You can search on a primary interest code.

Secondary: You can search on a secondary interest code.

The *Opportunity Number* field identifies the number of an opportunity.

3. Choose Find.

   The Opportunity window appears and displays the items matching your search criteria.

▶ **To rerun a search when no opportunities are found:**

1. Choose the Clear button in the Find Opportunity window to clear your previous search criteria.
2. Enter less restrictive search criteria.

   For example, if you were previously searching for a company name and account code, search for just the company name.

3. Choose Find to run your query.

   If the opportunity is not in the system, you can enter a new opportunity. See: Entering or Updating a Sales Opportunity: page 5 – 6.

☞ **Attention:** You might not be able to locate an opportunity because you do not have access to it. Your territory administrator determines what opportunities you can access. To see all the opportunities you have access to, enter your name in the Employee field of the Sales Team window. Make sure all other fields, except Sales Group, are empty. Choose Find. All opportunities you have access to display in the Opportunity window.

▶ **To view details about a particular opportunity:**

■ Choose the drill down button next to the selected opportunity.

Entering or Updating a Sales Opportunity

A sales opportunity is identified by a sales representative as having the potential to turn into a sale. The Opportunity window lets you manage a specific opportunity through the sales cycle. You can enter additional details about an opportunity (such as the particular sales channel through which the opportunity came, the classification of the opportunity, or sales credit information).

The Opportunity window lets you toggle between the summary information and line detail level entry of an opportunity. To toggle between the summary and the line detail, choose the Summary / Detail button on the toolbar, or choose the Summary / Detail button on the Opportunity window.

The Opportunity Summary window.

Company Name: The name of the company.

Account Code: The account code.

City: The city in which the company resides.

Main Interest: A free–form text description of the driving force behind the opportunity.

Status: Select from the list of values.

Revenue Amount: The total dollar amount of revenue credit being received for this opportunity.

Quota Credit: The total amount of quota (nonrevenue) credit that the current sales representative receives for this opportunity.

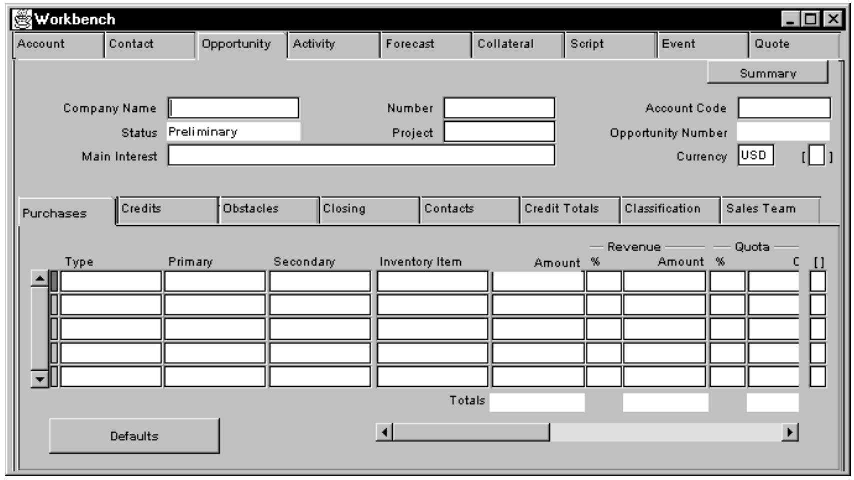
Channel: Select from the list of values.

Opportunity Num: A unique number identifying the opportunity.

The Opportunity Detail window.

▶ To enter a new opportunity:

1. Select the Opportunity tab.



2. Enter company name and account code. Entry in these fields are required. In addition, the following fields can be used:

   Main Interest: This is for notes about the opportunity. This field is a required entry.

   Currency: This lets you select from the list of values.

   If your implementation team decides that the Win Probability field determines the status, then you may not be able to select a value for the Status field. It will be automatically entered once you select a win probability.

3. Choose Save on the toolbar to add the new opportunity details to the database.

▶ To enter more details about the opportunity:

1. Enter more information about an opportunity in the Main Interest field.

2. Choose Save on the toolbar to add more opportunity details to the database.

Entering Purchase Information for a Sales Opportunity

The Purchase window lets you track information relating to the sales cycle. You can provide an accurate forecast to your management and effectively manage your pipeline by maintaining an up–to–date record of the purchase cycle information for a single opportunity. To help prioritize your workload, view your pipeline ordered by criteria that is most useful to you; for example, by sales stage or by win probability.

▶ **To enter purchase information for an opportunity:**

1. Select the Purchases sub tab.
2. Categorize the purchases.

   If your implementation team has defined a set of standard expected purchases, the system displays them to you as a starting point from which you can build the specific opportunity.
3. If you know the exact product you expect them to purchase, enter it in the Inventory Item column. Otherwise, use the Type, Primary, and Secondary fields to categorize the opportunity.
4. Use the Amount field to enter the customer's expected cost for each item.

   Your implementation team determines the scaling factor for this field.
5. Enter the revenue value you expect each item to produce for you.

   You can enter a revenue percentage or a revenue amount. If you enter a percentage, the quota credit is automatically calculated; conversely, if you enter a quota credit, the quota percentage is calculated.
6. Choose the Credits sub tab to view revenue amounts of other sales representatives.

   By the time the opportunity status is forecasted, the sum of all revenue amounts equal the value entered in the Amount field for this line. In other words, if you are sharing this opportunity with another sales representative, the sum of the values you enter for the revenue amount will equal the value in the Amount field.
7. Enter the effect you expect each item to have on your quota.

   You can enter a quota percentage or a quota credit. If you enter a percentage, the quota credit is automatically calculated; conversely, if you enter a quota credit, the quota percentage is calculated.

See: Viewing Sales Credits for a Sales Team: page 5 – 10 and Updating or Viewing a Sales Team: page 5 – 17 for more information.

8. Enter expected purchase quantities and the unit of measure for the item in the Quantities and UOM fields, respectively. This field is optional.

   The available units of measure are defined by your implementation team.

9. Select a sales stage for the opportunity.

   Each sales status is linked to an acceptable range of win probabilities. Selecting a sales stage outside the range results in either a warning or an error, depending on the rules set up by the implementation team.

   All sales status changes are recorded in the Notes window as a system generated opportunity note.

10. Enter the opportunity's expected close date in the Close Date field.

    If you enter a close date value, it defaults as the close date for all expected purchase lines. You can override it for a specific expected purchase.

    If you change this value, an alert window opens and prompts you to copy the change to all expected purchases on the opportunity that shared the original close date value. This is a safeguard feature.

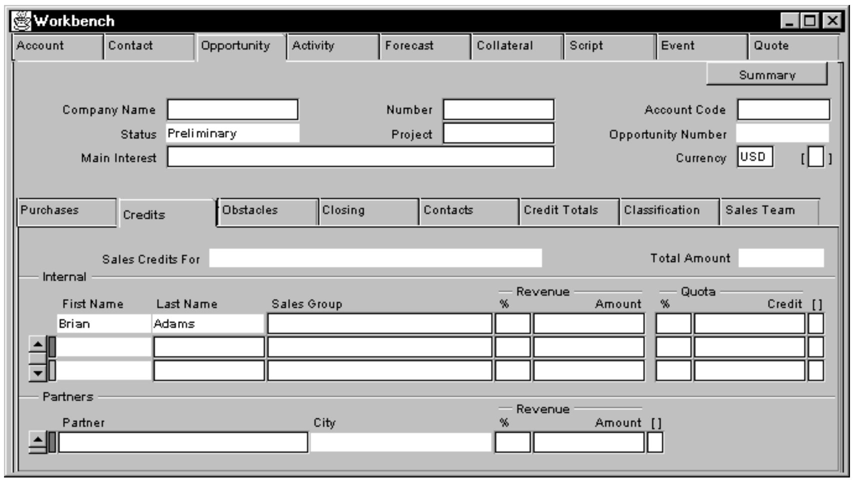
11. Choose Save on the toolbar to add the purchase information for an opportunity to the database.

Viewing Sales Credits for a Sales Team

The Sales Credits window displays the total revenue and quota credits of an opportunity for each member of the internal sales team. In addition, partner information can be entered or viewed.

▶ **To view sales credits for a sales team:**

- Select the Credits sub tab.



Credits are divided into two groups:

Internal: Employees who earn credits on an opportunity line.

Partners: External sales partners who earn revenue when an opportunity line becomes a sale.

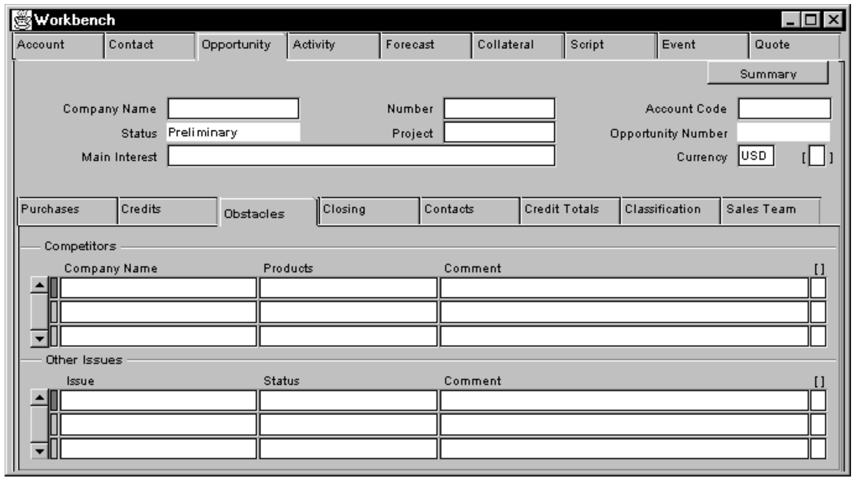
Attention: Revenue credits must always add up to 100%.

Tracking Obstacles to a Sale

The Obstacles window lets you track competitors or other issues that might affect your ability to win a sale.

▶ **To track obstacles to a sale:**

1. Select the Obstacles sub tab.



2. Enter information about the companies you are competing against for this opportunity in the Competitors region.

   Your implementation team may define a standard list of competitors and products.

3. Enter other issues that might affect the sale in the Other Issues region.

   Your implementation team may define a standard list of issues. If so, use the list of values to select an issue.

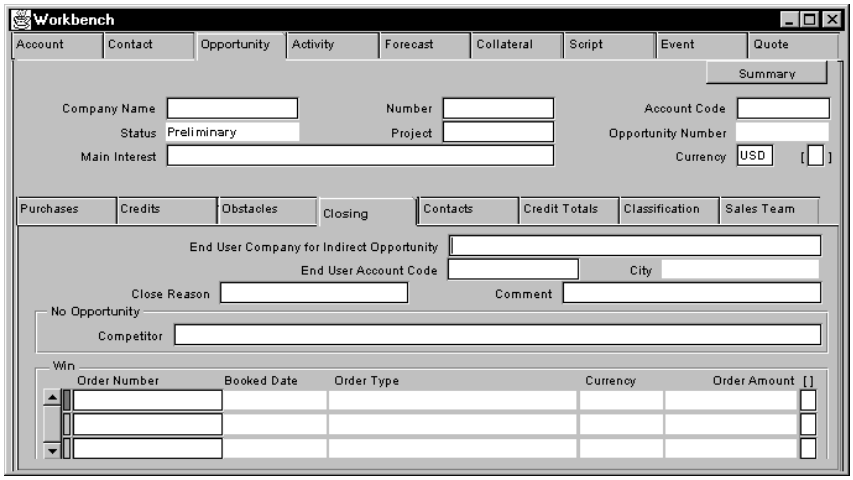
4. Choose Save on the toolbar to add information about your competitors to the database.

Entering Closing Information

The Closing window lets you record the outcome of an opportunity.

▶ **To enter opportunity closing information:**

1. Select the Closing sub tab.



2. Enter details of the close. You can enter information in the following fields:

   End User Customer for Indirect Opportunity: For indirect opportunities, enter the name of the customer to whom your customer is selling your product.

   End User Account Code: If you have a code for this account, enter it.

   Close Reason: Enter the closing reason.

   Comment: Describe the reason for the win or loss, if the standard list of reasons is not sufficient.

3. Choose Save on the toolbar to add the opportunity closing information to the database.

▶ To record a loss to a competitor (No Opportunity):

1. Enter the name of the vendor to whom the opportunity was lost.

   This can be a list of all accounts flagged as *competitors*, depending on how your implementation team set up Oracle Sales and Marketing.

2. Choose Save on the toolbar to add the loss of a competitor to the database.

▶ To record a close resulting in a win (Win):

- Enter the order number(s) resulting from this win. The Booked Date, Order Type, and Order Amount fields for the order are displayed automatically once you move the cursor out of the Order Number field.

Contacts Related to an Opportunity

The Contacts window within the Opportunity tab displays the name, title, job title, and phone number of any contacts related to this opportunity. In addition, the window contains the Contact's Rank on Opportunity field.

The Contact's Rank on Opportunity field allows a contact to be rated by influence to the opportunity. For example, if you are selling software to an organization, the MIS manager who makes the critical decision on which software performs best on the company's system, can clearly be given a rank of "Very High." The Accounts Receivable manager may have a lower rank in terms of the sale.

The values in the Contact's Rank on Opportunity list are determined by the implementation team.

The Active check box lets you make a contact inactive by unchecking the box.

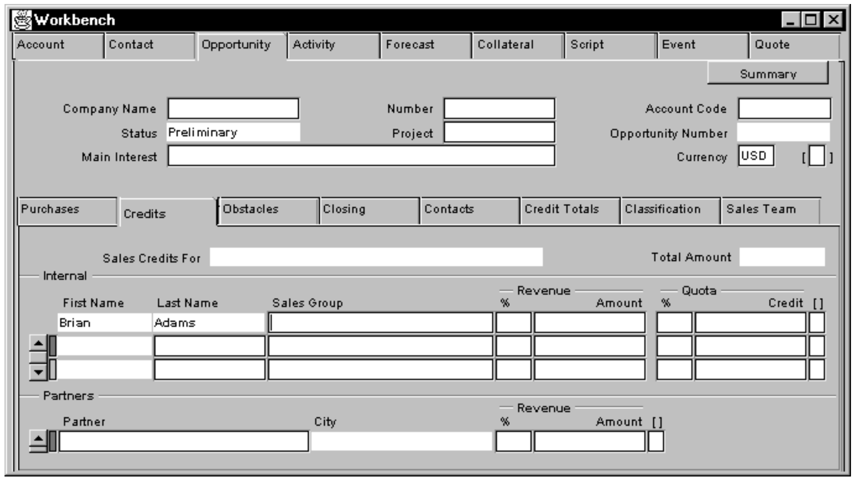
You can use the flexfield for any additional information related to the contact.

Credit Totals

The Credit Totals window within the Opportunity tab shows the total revenue credit and quota credit generated to date by the sale for each employee in the sales team and any partners.

▶ **To view sales credits for a sales team:**

■ Select the Credits sub tab.



Credits are divided into two groups:

Internal: Employees who earn credits on an opportunity.

Partners: External sales partners who earn revenue when an opportunity becomes a sale.

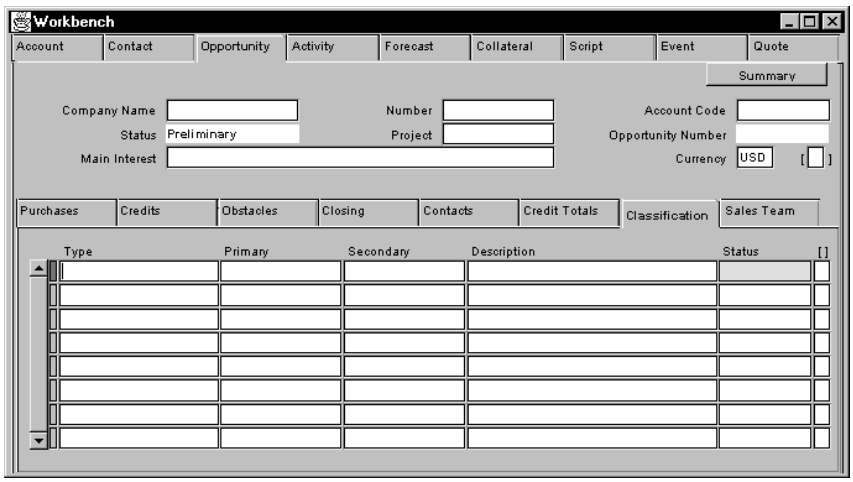
Attention: Revenue credits must always add up to 100%.

Classifying a Sales Opportunity

The Classification window within the Opportunity tab lets you classify an opportunity according to categories defined by your implementation team. The values you enter here can be used to assign this opportunity to the appropriate sales team. If your company has a lead generation organization that forwards leads to you, then this window is likely to include information that they entered when the lead was created.

▶ **To assign classifications to a sales opportunity:**

1. Select the Classification sub tab.



2. Use the Type, Primary, and Secondary fields to classify the opportunity.

☞ **Attention:** Your implementation team determines the permissible values for these fields. You can classify by SIC codes, types of industry, or other significant categories.

3. Enter your descriptive notes in the Description field (optional).

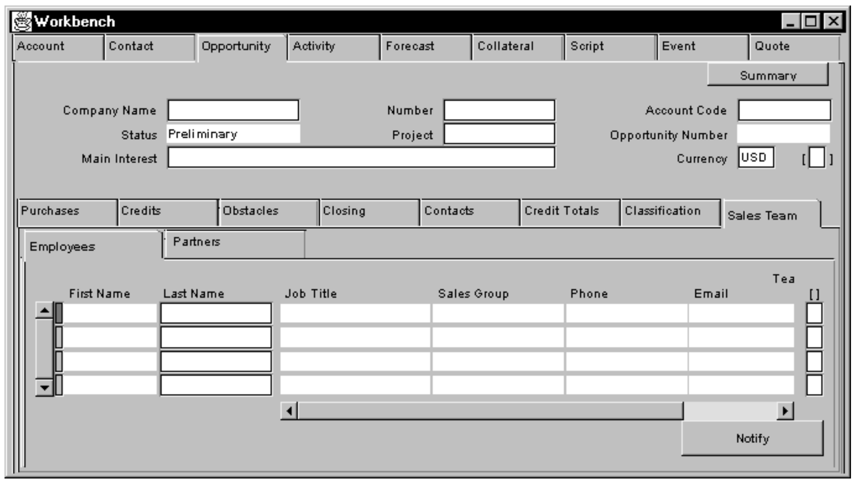
4. Choose Save on the toolbar to add the classified sales opportunity information to the database.

Updating or Viewing a Sales Team

The Sales Team window within the Opportunity tab lets you view and update all internal salespeople and business partners assigned to an opportunity. Sales teams can be created automatically or manually. They are created automatically when your Territory Administrator makes territory assignments. You can manually assign a salesperson or a business partner to your sales team by entering the information in this window.

▶ **To update or view a sales team:**

1. Select the Sales Team sub tab.



2. Enter information either by entering the individual’s name or selecting from the list of values.

3. Check the Keep check box to add the sales team employee to the sales team.

   If you assign credits to internal employees or business partners within the Credits window, that information is automatically added to the sales team.

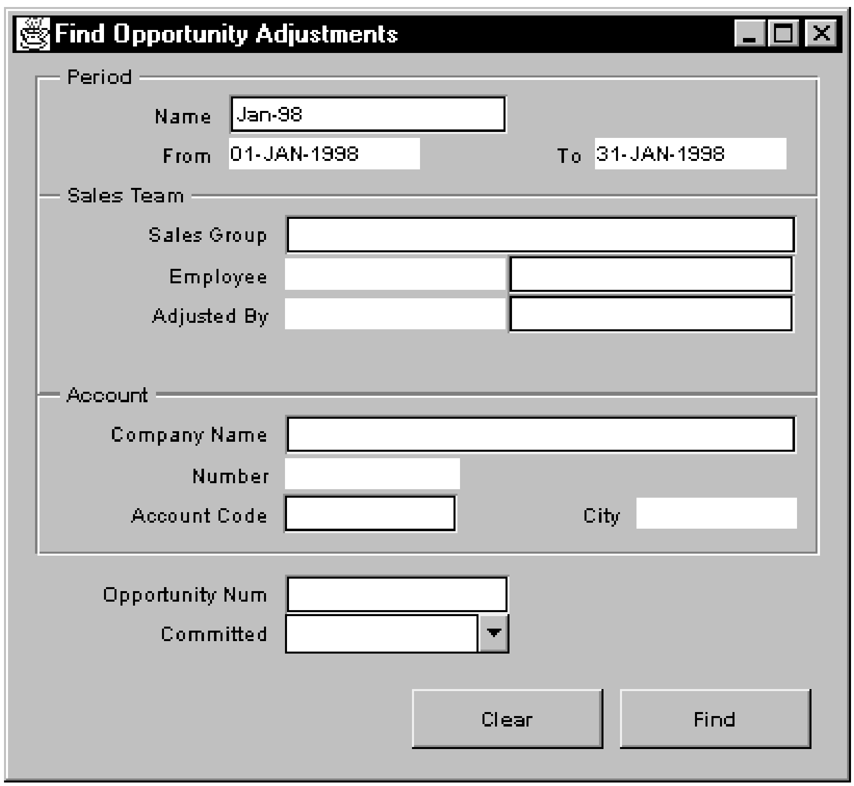
4. Choose Save on the toolbar to add the sales team information to the database.

Opportunity Adjustments

The Opportunity Adjustments window lets sales managers create their own view, and hence their own commitment, of the opportunities their sales representatives are working on. They differ from the Sales and Marketing forecasting module in one key way: the forecasting module aggregates all the opportunities a sales representatives is working on. Opportunity adjustments focus on individual opportunities. They are designed for companies that sell high dollar, long sales cycle items.

Finding Opportunities to Adjust

The first step in creating opportunity adjustments is to find the opportunities. The Find Opportunity window lets you search for opportunities based on a number of criteria. You can display the Find Opportunity window by choosing the Find button on the toolbar.



The following regions are used in the window:

Period: The accounting period the forecast applies to. All opportunities scheduled to close within the period you select and that have a status of Upside or Forecasted (based on the Win Probability) will be displayed.

Sales Team: You can search for opportunities by Sales Group, Employee, or by the person who adjusted the opportunity. There is also a Filter check box. This restricts the opportunity line items that are displayed to only those lines that have representative getting credit for them that are assigned to the selected Sales Group.

Account: Lets you search for opportunities at a specific account.

The following field is used in the window:

Opportunity Num: If you know the Opportunity Number you can search for it directly.

Adjusting Opportunities

The Opportunity Adjustments window lists all opportunities fitting the criteria you entered in the Find Opportunity Adjustments window. There are three fields you can update: the Amount, the Win Probability and the Close Date. Changing any of these fields does not change the actual opportunity. It creates your own personal view of what you expect to actually happen on the opportunity. A description of each field follows:

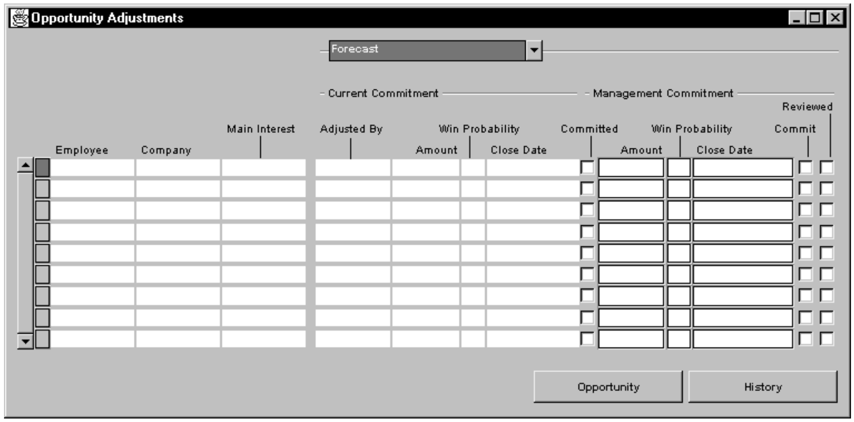
Amount: The amount shown is the total value of the opportunity. If you adjust the total amount, the change will be spread equally across all line items.

Win Probability: The primary reason for changing the Win Probability is to move a particular opportunity or line item out of the forecast. If you feel an opportunity is not as far along in the sales cycle as the sales representative does, you can make an appropriate adjustment here. Remember, it does not change the actual opportunity–only the management view of it.

Close Date: Like Win Probability, the main reason for changing the Close Date is to move the opportunity into another forecast period.

Commit and Reviewed Flags: When you are ready to commit your numbers to your manager, check the Commit check box. You should also check the Reviewed check box. The next time you look at this opportunity, the Reviewed check box lets you know that you do not need to re–review this opportunity.

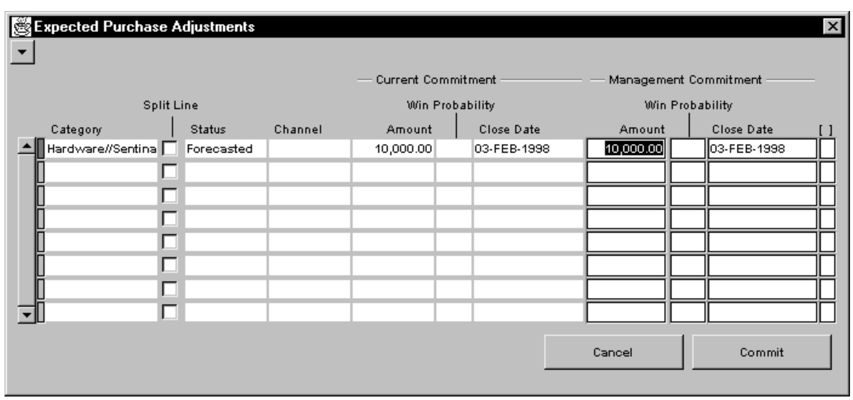
The History button displays all the adjustments that have been made to the current opportunity. The Opportunity button takes you to the particular opportunity within the Workbench. From here you can change the actual opportunity information.



▶ **To change the amount, win probability, or close date for a particular line item on an opportunity:**

1. Drill down the Opportunity Adjustments window.

   The Expected Purchase Adjustment window lists each line items for the opportunity.



2. The Split Line check box lets you know if credit for a particular line is split between more than one sales representative. Remember, both representatives may not be in your sales group. If a line is split, the Amount shown under Current Commitment will be the amount of credit your representative is getting, not the total line amount. Adjustments to the Management Commitment, however, are to the total line amount.
3. Choose the Commit button to save your Expected Purchase Adjustments.

CHAPTER

6

Managing Activites

The Activities module in Oracle Sales and Marketing lets you record, review, and add information about an account, contact, and opportunity.

The following topics are included:

- Overview of Activities: page 6 – 3
- Making Notes: page 6 – 4
- System Generated Notes: page 6 – 9
- Activity List: page 6 – 10
- Interactions: page 6 – 14
- Automatically Created Interactions: page 6 – 15
- Notifications: page 6 – 16

The following tasks are included:

- Finding Notes for an Account, Contact or Opportunity: page 6 – 4
- Viewing All Notes for an Account, Contact, or Opportunity: page 6 – 6
- Viewing the Most Recent Note for a Contact: page 6 – 8
- Entering a New Note or Editing an Existing Note: page 6 – 8

- Viewing Your Activity List: page 6 – 10
- Finding To Dos for an Account, Contact or Opportunity: page 6 – 11
- Entering a New To Dos or Editing an Existing To Dos: page 6 – 12
- Recording or Deleting Interactions: page 6 – 14

Overview of Activities

Oracle Sales and Marketing provides you with several tools to manage information, action items, and promotional responses. The Activity tab defaults to your To Dos list, which lets you manage the days events for all open items. You may retrieve specific information from the Find Activity window based on search criteria. For example, a sales representative returning from vacation can review all the To Dos during their absence. Another example is a new hire can review all Notes for a specific company to familiarize themselves with an account.

When you select the Activity tab, a summary window appears with five buttons to manage: All, To Dos, Notes, Interactions, and Notifications. A sales representative can choose any button to review the details. When you choose All, To Dos, or Notes, you can add new records. All information within the Activity module uses a folder window that lets you personalize the format and print the contents.

The five buttons are defined as follows:

All: Lists all your To Dos, Notes, Interactions, and Notifications.

To Dos: Lists of all your action items. You can assign an action item to another employee. The To Dos detail window is the same as the Notes detail window, but has the following additional fields: Due Date, Time, Priority, and Close By. It also has a check box, which lets you indicate if the action item is personal or work–related.

Notes: Lists an activity history for a company, account, or a contact Anyone with access to an account can view or add notes.

Interactions: Lists the interactions between you and a contact. This window is read–only.

Notifications: Reserved for future use.

Making Notes

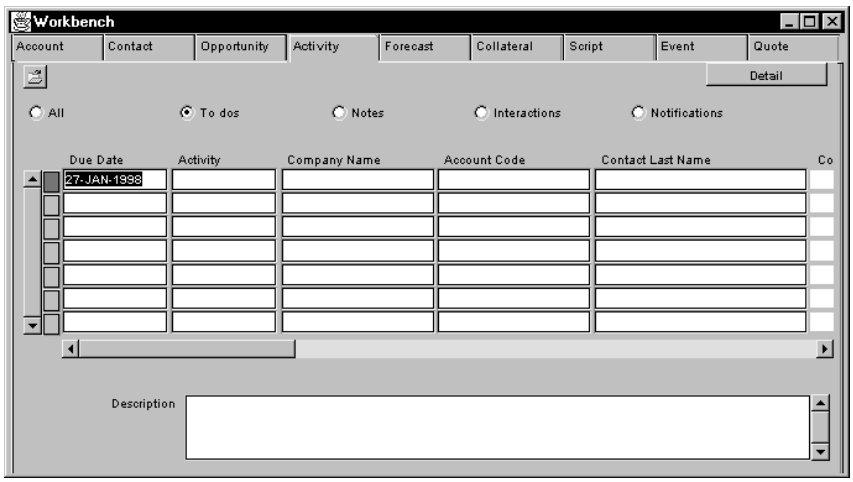
This section explains Oracle Sales and Marketings ability to save, present, and protect your valuable notes regarding accounts and contacts.

Finding Notes for an Account, Contact, or Opportunity

The Find Activity window lets you locate notes about an account, contact, or opportunity.

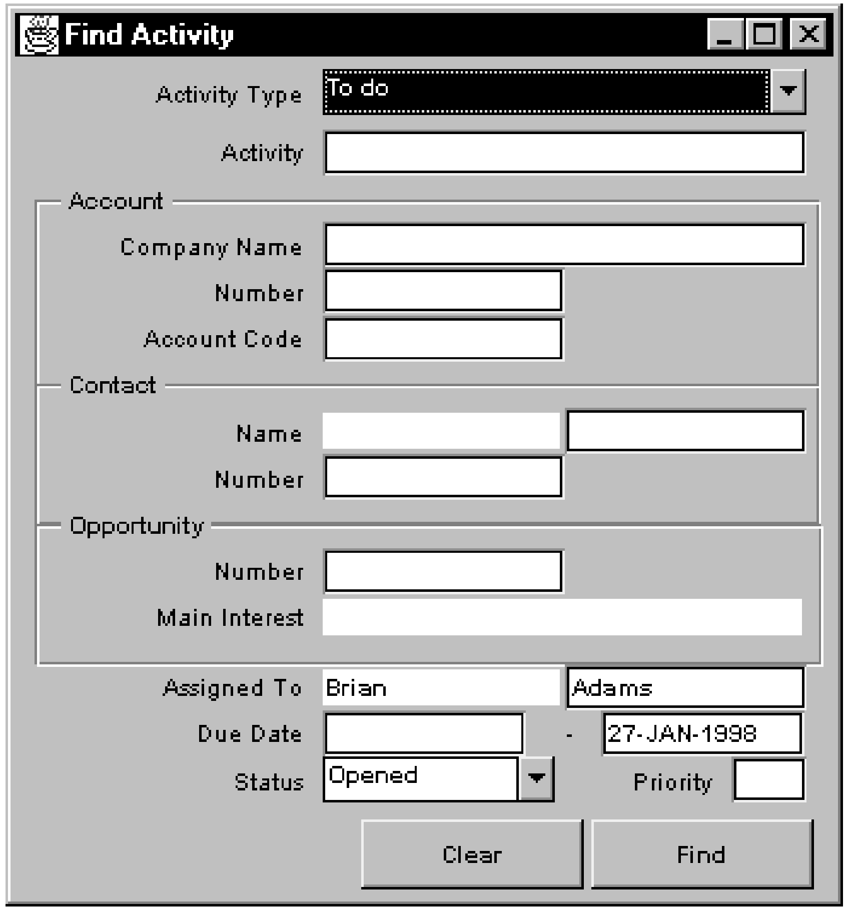
▶ **To find notes for an account, contact, or opportunity:**

1. Select the Activity tab.



2. Choose Find on the toolbar.

   The Find Activity window appears.



3. Select Note from the list of values in the Activity Type field.

4. Enter search criteria in any of the following regions or fields:

   Account: This region lets you search for the company name, company number, and account code.

   Contact: This region lets you search for the contact name and number.

   Opportunity: This region lets you search for the lead number and main interest.

   Due Date: This field lets you search by entering a start date and an end date range.

Attention: The following fields are only enabled for To Dos.

Assigned To: This field lets you search for the person assigned to the To Dos. Enter the employee's name in this field.

Status: This field indicates whether this activity type is opened or closed.

Priority: This field indicates the priority of the activity. The value is numeric, for example, 1, 2, 3, etc.

5. Choose Find.

   You can change any of the displayed search criteria. For example, if you navigated from an account window and you want to view notes for a specific contact in the account, you can enter the contact's name or number in the Contact region.

☞ **Attention:** You cannot search by source alone. The Find Activity window expects you to enter information in the Account, Contact, Opportunity, or Status fields, in addition to a source.

▶ **To quickly select notes for only the current contact or opportunity:**

1. With a Contact or Opportunity window active, select the Activity tab.
2. Choose Find on the toolbar.

   The Find Activity window appears and is pre–filled with context information about the contact or opportunity you are currently working with.
3. Choose Find in the Find Activity window.

   The Notes window opens displaying all notes for the current contact or opportunity.

Viewing All Notes for an Account, Contact, or Opportunity

When you open the Activity window from either the Account, Contact, or Opportunity window, you see all notes pertaining to that particular account and company plus the contact or opportunity notes. In addition, you may see notes about a contact or opportunity depending on where you navigated.

The Activity window shows both the summary and the line detail level entry of an activity. To toggle between the summary information and line detail, choose Summary / Detail on the toolbar, or choose the Summary / Detail button on the Activity window.

▶ **To view all notes for an account, contact or opportunity:**

1. Select the Activity tab.
2. Choose the Notes button.

   The Notes window displays all notes entered for an account plus any notes for the company, contacts, or opportunities associated with the account:

   Company Comment: A special note that displays in the Account Detail and Opportunity windows for all accounts of this company. Use this note to record critical information that should not be lost among the other date sorted notes.

   Account Comment: A special note that displays in the Account Detail and Opportunity windows for this account. Use this note to record critical information that should not be lost among the other date sorted notes.

   Note Source: Displays the opening words of the note text. Select a particular note to see the complete text displayed in the Description field.

Viewing the Most Recent Note for a Contact

You can view the most recent note entered about a contact in the Notes window, provided you have already searched for and brought up the account or contact for which you want information in the Account or Contact window. If you want to enter a new note for a contact, create a new entry in the Notes window.

▶ **To view the most recent notes for an account, contact, or opportunity:**

1. Select the Activity tab to open the Notes window.
2. In the Notes window, choose Find on the toolbar.

   The Find Activity window appears and displays your last search criteria.
3. Choose the Clear button.

   All regions and fields are cleared.
4. Select Note from the list of values in the Activity Type field.
5. Enter your new search criteria.
6. Choose Find to display the notes matching your new search criteria.

Entering a New Note or Editing an Existing Note

You can use the Notes window to enter or edit a note for an account, company, contact, or opportunity.

▶ **To enter a new note:**

1. Select the Activity tab to open the Activity window.

   ☞ **Attention:** You can also choose the Notes button on the toolbar.
2. Choose the Notes button.
3. Choose New Record on the toolbar to insert a blank line in the list of notes.
4. Enter the activity for the note.
5. Enter the note text in the Description region.

A note can be about an account, contact, opportunity, or personal. The Note Detail window displays the appropriate information for the account, contact or opportunity you navigated from.

For example, if you open the Notes window from the Account Detail window and drill down on a new record, the Company Name, Number, and Account Code fields display the data for that particular account. If you open the Notes window from the Contact window and drill down on a new record, the Company Name, Number, Account Code, and Contact Name fields display the data for that particular contact.

You can add, change, or clear information from any of these fields to enter a note for a different account or contact. The information in these fields is used to create the About field of the Notes window.

6. Choose Save on the toolbar to add the new note information to the database.

▶ **To edit an existing note:**

1. Select the Activity tab to open the Notes window.

☞ **Attention:** You can also choose the Notes button on the toolbar.

2. Select the note you want to edit.

3. Modify the note text or drill down to open the Note Detail window to edit the note from there.

☞ **Attention:** Your system administrator may choose to limit the time during which a note can be edited after its creation. If you try to edit a note after that time limit has elapsed, an error message appears.

4. Choose Save on the toolbar to add the edited note to the database.

System Generated Notes

Oracle Sales and Marketing automatically generates notes whenever certain events occur within the system, including: changes in the sales stage, collateral orders, and responses to promotions.

Activity List

This section explains how to use the Activity window to remember your commitments and to delegate To Dos to others.

Viewing Your Activity List

The Find Activity window can be selected from the Activity window. It lets you selectively list To Dos. For example, you can choose to view only To Dos for a contact, those due on a specific date, or only those To Dos of a certain category.

If you also have Microsoft Schedule+ Version 7.0 on your system, you can schedule items from your To Dos list into Schedule+.

☞ **Attention:** You need to set the Profile Option OSM: Enable MS+ Schedule Integration to Yes to use this feature.

As you manage your work day, you can periodically review all To Dos assigned to you. You may also print your Activity list by saving it as a folder and exporting it to Excel or perform the following steps to view To Dos in your Activity window.

▶ **To view all To Dos assigned to you:**

1. Select the Activity tab.

   You can use the Find Activity window to locate To Dos about an account, a particular contact, or an opportunity.

2. Select Opened from the list of values in the Status field on the Find Activity window.

   Choosing Find with these search criteria selects all of your uncompleted To Dos that are due by the end of the day.

3. Modify default search criteria, if appropriate.

   You can change any of the displayed search criteria. For example, to view all your uncompleted To Dos (regardless of when they are due), clear out the Due Date field.

4. Choose Find to display your Activity list.

Finding To Dos for an Account, Contact or Opportunity

When you open the Activity window you see all open To Dos related to accounts, plus contact and / or opportunity To Dos depending on what you selected.

▶ **To find To Dos for an account, contact, or opportunity:**

1. Select the Activity tab. If you navigated from the:

   - Account window, the Account region displays the prefilled Account Name, Number, and Account Code fields.
   - Contact window, the Contact region displays the prefilled Contact Name and Number fields; and the Account region displays the prefilled Account Name, Number, and Account Code fields.
   - Opportunity window, the Opportunity region displays the prefilled Opportunity Number and Description fields; and the Account region displays the prefilled Account Name, Number, and Account Code fields.

   You can change any of the displayed search criteria. For example, if you navigated from an account window and you want to view To Dos for a contact at this account, you can enter the contact's name or number in the Contact region. Conversely, if you had been viewing To Dos for a contact and you now want to view all To Dos for the account, clear the contact region.

2. Enter other search criteria.

   You can further narrow your search by entering information in any of the Assigned To, Due Date, or Status fields.

   Assigned To: This field lets you search for the person assigned to the To Dos. Enter the employee's name in this field.

   Due Date: This field lets you search by entering a start date and an end date range.

   Status: This field lets you search for *Opened* or *Closed* To Dos. When entered, a To Dos defaults to Opened.

3. Choose Find to display the To Dos matching your search criteria.

Entering a New To Dos or Editing an Existing To Dos

The Activity Detail window lets you enter or edit a To Dos. You can enter To Dos for yourself or another person on your sales team; associate a To Dos with an account, contact, or opportunity; or enter personal To Dos that cannot be viewed by others.

When you enter a new action item in your Activity List, you have the option, if you have installed Microsoft Schedule+, to add the action item to your Microsoft Schedule+ calendar.

▶ **To enter a new To Dos:**

1. Select the Activity tab.
2. Choose the To Dos button.
3. Choose New Record from the toolbar to insert a blank line in the list of To Dos.
4. Enter the activity.
5. Enter the To Dos description in the Description field.
6. Assign the To Dos.

   The Assigned To field displays your username. Use the list of values to assign this To Dos to someone else in your work group.
7. Check the Personal check box if you do not want this To Dos to be visible to other users.
8. Prioritize the To Dos, if appropriate.

   Your enterprise may or may not have a priority numbering system that describes the urgency of To Dos assigned. You can develop your own system for personal priorities. Entries must be numeric.
9. Assign a due date.

   Enter the date by which the task must be completed.

   Use the Time fields if the To Dos should be started and/or completed at a particular time. You can choose either a twelve or twenty–four hour format. Use the *OSM: Time Format* profile option to select a format.
10. Enter account or contact information, if appropriate.

    A To Dos can be associated with an account, contact or opportunity. When you open this window, Oracle Sales and Marketing assumes you want to enter a To Dos for the account, contact, or opportunity you are currently working with.

You can add, change, or clear information from any of these fields to enter a new To Dos for a different account, contact or opportunity.

Leave all fields in these regions blank if the To Dos is not tied to a specific account, contact or opportunity.

11. Choose Save on the toolbar to add the new To Dos to the database.
12. If you schedule the action item within Microsoft Schedule+ and you have enabled the *OSM: Use Microsoft Scheduler* profile option, you can select the Microsoft Schedule+ icon.

    Microsoft Schedule+ does not open when you select the icon; however, the next time you open your Microsoft Schedule+ application, your appointment is recorded.

☞ **Attention:** If you make changes to your Microsoft Schedule+ appointment created within Oracle Sales and Marketing, the change will not be reflected within Oracle Sales and Marketing; you'll have to manually change the information.

▶ **To edit an existing To Dos:**

1. Select the Activity tab.
2. Select the To Dos you want to edit.
3. Edit the To Dos fields, if appropriate.

   You can edit any of the fields in this window.
4. Choose Save on the toolbar to add your edits of an existing To Dos to the database.

Interactions

For your contacts, you can create an interaction to record an inbound phone call, an outbound phone call, a mailed–in response, or a visit by choosing the Interaction button.

Note: The Interaction button on the tool bar is active when you are in the Contact window.

The Interaction button opens a window containing a group of interaction types, a field to record the interaction date (defaults to todays' date), and a field to record the promotion code.

☞ **Attention:** Once created, you cannot update an interaction.

Recording or Deleting Interactions

▶ **To record interactions:**

1. Choose the type of interaction:

   Inbound Phone Call

   Create an interaction that includes identification of the contact, the account, the sales rep, the time, and the date. If you enter a promotion code, then the interaction record also includes a reference to the marketing program to which the contact is responding.

   Outbound Phone Call

   Record caller information and link the call to a marketing promotion.

   Mailed–In Response

   Create an interaction record that allows you to record response cards that are not tied to a script. If you enter a Promotion Code in the Find Account window or the Interaction window, the interaction record also identifies the marketing program the response card is responding to. (If you use the Mail Responses window to record the response, Oracle Sales and Marketing will automatically create an interaction record.)

   Visit

   Create an interaction record of type 'Visit' that includes identification of the contact, account, sales rep, and date.

2. Choose OK.

▶ **To delete an Interaction:**

- Oracle Sales and Marketing lets you purge notes. You cannot delete interactions any other way. To purge notes, contact your system administrator.

Automatically Created Interactions

For certain tasks you perform in the system, Oracle Sales and Marketing automatically creates a note. This helps you build a complete history of your interactions with your contacts.

Mailed–In Response

Oracle Sales and Marketing automatically creates a *Mailed–In Response* interaction record if you record a response using the Mail Response Form. The interaction includes identification of the contact, the account, the sales representative, the date, and the promotion to which the contact responded (which is usually the script promotion that represents the response card).

Mailing

Oracle Sales and Marketing automatically creates a *Mail Blitz* when you send a mailing to an individual using the Mail Blitz Form, or an Event Mailing if you send a mailing to an event registration list using the Event Setup Form.

Oracle Sales and Marketing starts a concurrent program that creates a Mail Blitz or Event Mailing interaction for each existing contact on a list when the status of a Mail Blitz or Event Mailing is *Ready*. Each interaction includes identification of the contact, the account, the sales representative, the date, the mail blitz, or event id.

Notifications

Reserved for future use.

CHAPTER

7

Customer Order History

This chapter describes how to use the various windows to view pending, current, and past customer orders.

Task descriptions in this chapter give you detailed information about:

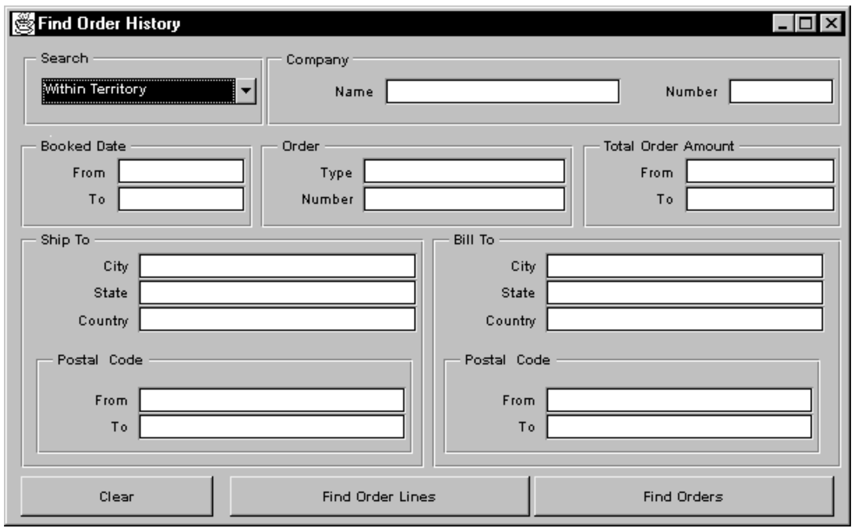
Finding Customer Orders

The Find Customer Orders window lets you view a customer's order history. You can locate orders based on different search criteria such as customer name, booked date, or order amount.

▶ **To find orders for a customer:**

1. From the Navigator, choose Account Management –> Order History.

   The Find Order History window appears and the customer name and number for the account or contact.



2. Choose whether to search for orders within your territory or from all orders, selecting from the search poplist.

3. Enter additional search criteria, if appropriate. You can enter any criteria in the following fields:

   Booked Date: The date that an order is booked, signifying that the order is firm and includes all the information necessary to be processed through its order cycle. If you enter a date in the From field, only orders booked from that date forward are presented. If you enter a date only in the To field, only orders booked up to that date are presented. To view a specific date range, enter a date in each field. In this case, orders booked within that range are presented inclusively.

Order Type: A classification of an order.

Order Number: A number that uniquely identifies an order.

Total Order Amount: The dollar amount of the order. Enter a value in the From field to find all orders greater than or equal to that dollar amount. Enter a value in the To field to find all orders less than or equal to that dollar amount. Enter a value in both fields to find all orders within that dollar range, inclusive.

Ship To: The address of the customer who is to receive products or services listed on the invoice or order.

Bill To: The address of the customer who is to receive the invoice. Equivalent to Invoice To Address in Oracle Order Entry.

Postal Code: Search for orders to customers within a range of postal codes.

4. Choose the Find Orders button or the Find Order Lines button.

   - Use Find Orders to view a summary of the orders matching your search criteria.
   - Use Find Order Lines to view a summary of the order lines matching your search criteria.

Viewing a Customer Order Summary

The Customer Order Summary window displays the order history for a customer.

▶ **To view all orders for a customer:**

1. From the Navigator, choose the Account Management –> Order History.
2. Enter your search criteria.

   See: Finding Customer Orders: page 7 – 2 for additional information.
3. Choose the Find Orders button to open the Customer Order Summary window.

   Notice that this is a folder window. You can customize the arrangement of information on this window and save this arrangement for retrieval later. Other fields displayed in the window are:

   Product Agreement: An arrangement with a customer that sets business terms for sales orders in advance. Oracle Order Entry lets you assign pricing, accounting, invoicing, and payment terms to an agreement.

   Sales Channel: A method used to generate a sales order, such as telemarketing, direct marketing, or sales partner.

   Sales Rep: The sales representative associated with the order.

Viewing a Customer Order Line Summary

The Customer Order Line Summary window displays the order history, by order line, for a customer.

▶ **To view all order lines for a customer:**

1. From the Navigator, choose the Account Management –> Order History.
2. Enter your search criteria.

   See: Finding Customer Orders: page 7 – 2 for additional information.
3. Choose the Find Order Lines button to open the Customer Order Line Summary window. The following fields appear:

   Line Number: A number that uniquely identifies a specific line of an order.

   Line Type: A classification of an order line.

   Item Type: An item is anything you make, purchase, or sell including components, subassemblies, finished products, or supplies. Item type is a classification of an item.

   For example:

   - A *standard* item type is any item that can have a bill or be a component on a bill.
   - A *model* item type is an item with options that you can choose from when you place an order.
   - A *kit* is an item that has a standard list of components that you ship when you process an order for that item.

   Item Description: A description of a product you offer for sale.

   System: A grouping of products based on some criteria. For example, if you support computer software applications, you can group all applications your customers install on a single machine into a system.

Viewing Customer Order Details

Choose the Customer Order window from either the Customer Order Summary window or the Customer Order Line Summary window to view additional details about an order.

▶ **To view customer order details:**

1. From the Navigator, choose the Account Management –> Order History.
2. Enter your search criteria.

   See: Finding Customer Orders: page 7 – 2 for additional information.
3. Choose the Find Orders button to open the Customer Order Summary window.

   Notice that this is a folder window. You can customize the arrangement of information on this window and save this arrangement for retrieval later. Other fields displayed in the window are:

   Product Agreement: An arrangement with a customer that sets business terms for sales orders in advance. Oracle Order Entry lets you assign pricing, accounting, invoicing, and payment terms to an agreement.

   Sales Channel: A method used to generate a sales order, such as telemarketing, direct marketing, or sales partner.

   Sales Rep: The sales representative associated with the order.
4. Choose the Find Orders or Find Order Lines button.

   Find Orders: Opens the Customer Order Summary window.

   Find Order Lines: Opens the Customer Order Line Summary window.
5. Drill down on the selected line to open the Customer Order window.

▶ **To view the dollar value of an order:**

- Select the Amounts and Credits alternative region.

  The total dollar value of the product is displayed.

  Total Product Value: The total product list value less the total product discount value.

Total Order Value: The total product value plus the total service value.

Total Commitment Value: The dollar value of a contractual guarantee, with a customer, for future purchases.

▶ To view the customer Bill To and Ship To addresses:

- Select the Addresses alternative region.

  The following fields appear:

  Ship To: The address of the customer who is to receive products or services listed on the invoice or order.

  Bill To: The address of the customer who is to receive the invoice. Equivalent to Invoice To Address in Oracle Order Entry.

▶ To view order line list price, selling price, and quantity:

- Select the Product Lines: Amounts alternative region.

  The following fields appear:

  List Price: Your base item cost to your customers.

  Selling Price: The List Price less any discounts.

  Discount: A reduction of the list price of an item.

▶ To view other information:

1. Select the Product Lines: System Mapping alternative region to view system information for each order line item.
2. Select the Service Lines alternative region to view service agreement details and service transactions by order line item.

CHAPTER

8 Managing Events

The Events module in Oracle Sales and Marketing lets you organize all aspects of planning events, as well as enrolling and following up with those who attend.

The following topics are included:

The following tasks are included:

Overview of Event Management

Oracle Sales and Marketing provides you with options for managing events such as product launches, training seminars, and trade shows. You can keep a record of the facilities you use for events, track the details on specific events you hold, register participants, and automatically send invitations, confirmations, and follow–up letters.

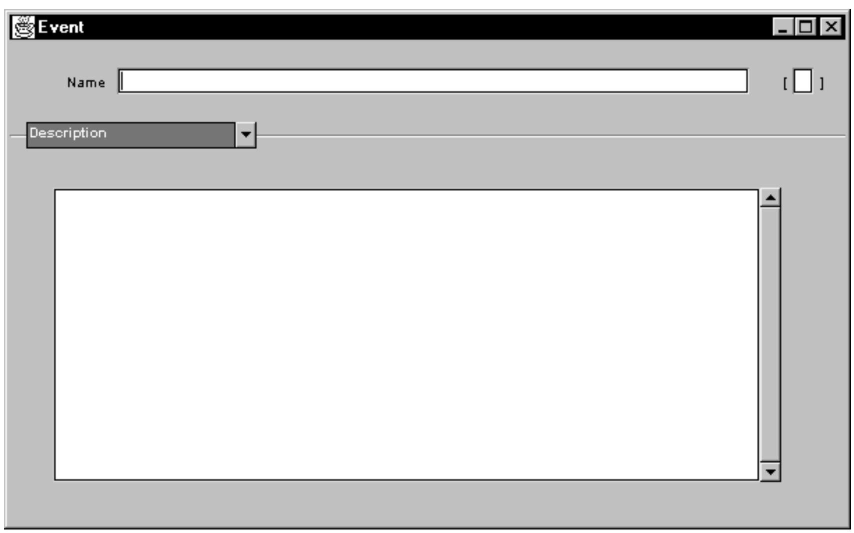
This section assumes that the event management function for your company is handled by an event administrator. The event administrator schedules the event and the facility; prepares initial mailings and follow–up letters; sets up automated evaluation scripts; and tracks attendance records and related statistics.

Setting Up an Event

To set up an event you must first give it a name and a description.

▶ **To name and describe a new event:**

1. From the Navigator, choose Events –> Event to open the Event window.



2. Enter the name of the event in the Name field.

   Use a name that is representative of the event, such as *System 2000 Training Seminar* or *1996 Industry Trade Show.*

3. Describe the event in the Description tab.

   Record information that all offerings of this event have in common. For example, if you are describing a training course, you may want to include details about the course content and a description of the intended audience.

   This information is available to telesales representatives when enrolling a contact in an event offering by viewing the Event Offerings Summary window.

4. Enter any special requirements for the event.

   See the task : To enter special requirements for the event.

5. Enter an event offering.

   See the task : To review and update an existing event.

6. Choose Save on the toolbar to add the event to the database.

▶ **To review and update an existing event:**

1. From the Navigator, choose Events –> Event to open the Event window.

2. Choose Enter from the Query menu.

3. Enter the event name you want to review in the Name field.

   If you don't know the full event name you can enter a portion with wildcard characters.

4. Choose Run from the Query menu to perform the search.

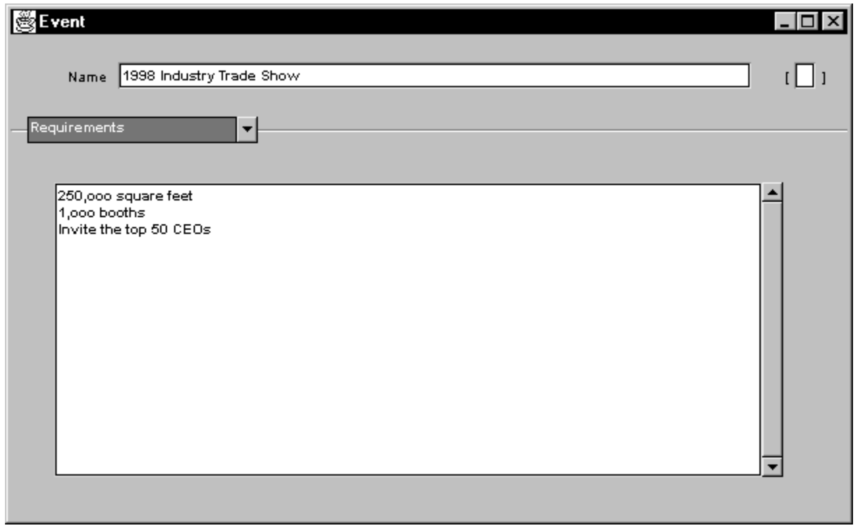
   If an event is located, it is displayed in the Event window. If not, enter less restrictive search criteria and run the query again.

5. Update any information in the Event window as required.

6. Choose Save on the toolbar to add the updated event to the database.

▶ **To enter special requirements for the event:**

1. Select the Requirements sub tab.



2. Enter any special requirements for this event. For example, for a dance marathon you may want to list the dance prerequisites.

   This information is available to sales representatives enrolling contacts in an event offering through the Event Offerings Summary window.

3. Choose Save on the toolbar to add the special requirements for the event to the database.

▶ **To review event offerings:**

1. Select the Event Offerings sub tab.

   The Event Offerings tab window is a display–only region.

2. If you are entering a new event for which you have not yet entered an event offering, this region is blank when you open it. Choose the New button to open the Event Offering window where you can describe a new offering.

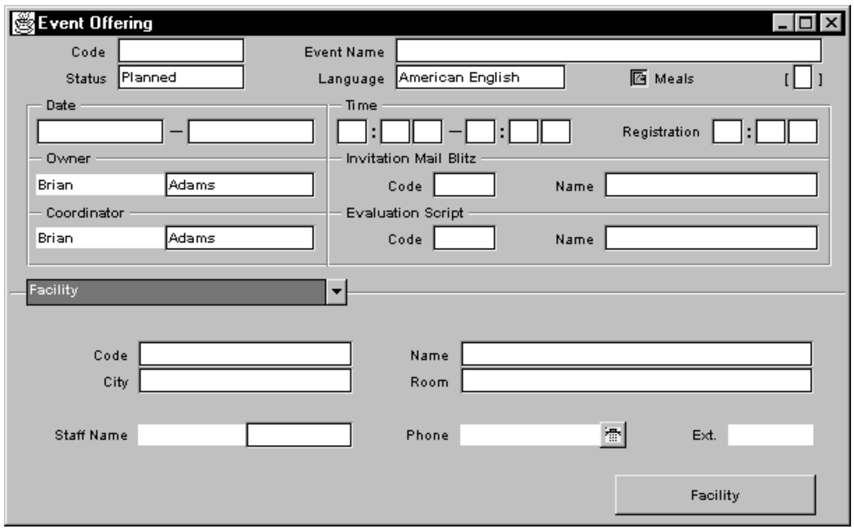
3. If you have previously set up offerings for an event, you can view a list here. Drill down on a line containing a listed offering to open the Event Offering window. The window displays more details about the specific offering.

Defining an Event Offering

You can enter details of an event such as date, time, and status. The Cost, Enrollment sub tab lets you track cost and enrollment numbers or select an event facility. The Personnel sub tab lets you update and view names of support personnel within the Event Offering window.

▶ **To define a new event offering:**

1. From the Navigator, choose Events –> Offering to open the Event Offering window.



2. Choose Enter from the Query menu.
3. Enter the event name to review in the Name field.
4. Choose Run from the Query menu to perform the search.

   If an event is located, it is displayed in the Event Offering window. If not, enter less restrictive search criteria and run the query again.

   If other offerings have been entered for this event, they are listed in this region.
5. Choose the New Record button on the toolbar to open a new Event Offering window.

   The Event Status field is set to Planned. The code is system generated once the event offering record is saved.

A Code is a number that uniquely identifies a particular event offering.

6. Choose Save on the toolbar to add the new event offering to the database.

▶ **To enter details about an event offering:**

1. Select a Status for the offering.

   There are four possible values: Planned, Scheduled, Cancelled, or Completed. The difference between Planned and Scheduled is that a contact cannot be enrolled in, nor can a sales representative view information about, a planned event offering. A scheduled event offering is available for enrolling participants.

2. Enter the event offering date, time, owner, and coordinator.

   Use the list of values to select an owner and coordinator from the list of employees at your company.

   The Owner is the person responsible for managing the event.

   The Coordinator is the onsite coordinator for the event.

3. Select an Invitation Mail Blitz and Evaluation Script name using the list of values. These items are defined below:

   Invitation Mail Blitz: The predefined mail blitz you are using to send invitational mailings. This field is for information purposes only.

   Evaluation Script: The predefined script you intend to use for event evaluations.

▶ **To select an event facility:**

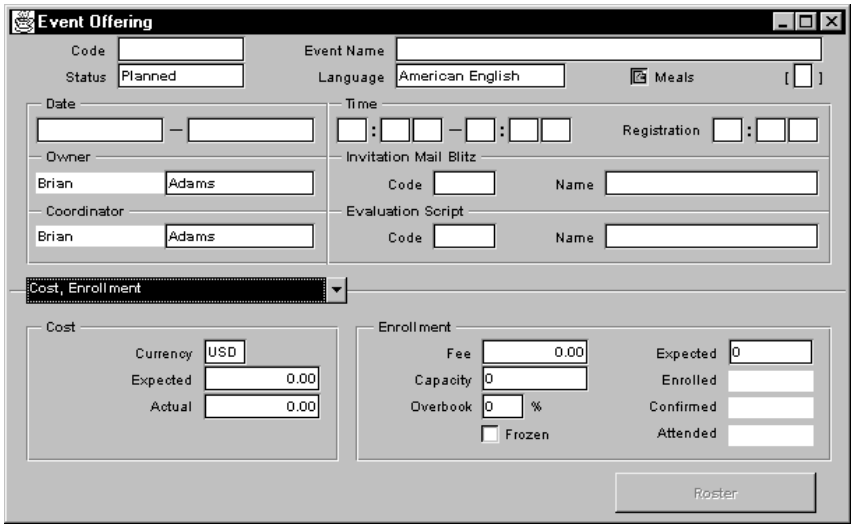
- Enter the appropriate information in the Facility sub tab.

  The Facility sub tab provides fields for you to enter the facility name, facility code (if you are using a code system), city, and particular function room name within a facility.

  If this facility has a primary staff contact, that name appears in the Staff Name field. This is the person you would normally contact when conducting business with the facility. The phone number and extension can also be entered.

▶ **To monitor event statistics:**

1. Select the Cost, Enrollment sub tab.



2. Use the Cost region to enter expense information.

   Currency: Select from the list of values.

   Expected: The total amount you expect this event offering to cost.

   Actual: Record your actual costs once the offering is complete.

3. Use the Enrollment region to enter fee and capacity numbers and to monitor enrollment numbers. The following fields are in the Enrollment region:

   Fee: The cost of enrollment fee for this offering.

   Capacity: The number of guests you can accommodate at this offering.

   Overbook: The percentage, over capacity, you allow the event to be overbooked. Given the capacity number and this percentage, an integer is computed, added to the capacity number, and displayed in the Max Allowed field in the Event Offerings Summary window. For example, if the capacity is 50 and the Overbook is 20 percent, the resulting integer is 10; the Max Allowed field would display 60.

Frozen: To freeze enrollment for an event regardless of whether capacity has been reached, check the Frozen check box. If a sales representative tries to register a contact for a frozen event, they receive a message that the event is full.

Expected: The number of guests you expect to enroll in this event.

Enrolled: This field is automatically calculated as guests are enrolled for an event.

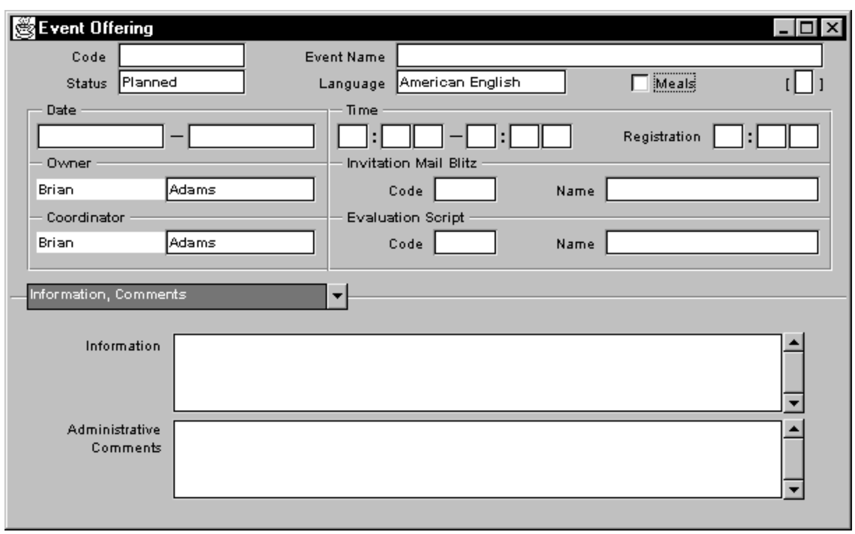
Confirmed: This field is automatically calculated based on the number of guests whose enrollment status is confirmed.

Attended: This field is automatically calculated when you update attendance records following an event offering.

Attention: Enrolled, Confirmed, and Attended are not mutually exclusive values. In other words, when someone is enrolled in an event and then confirmed, the number in the Enrolled field remains the same, and the Confirmed field increases by one. Following the event, when you mark that person as having attended, the Enrolled and Confirmed fields remain the same and the Attended field increases by one.

▶ **To enter information specific to an event offering:**

1. Choose the Information, Comments sub tab to record details specific to this offering.



2. If you have information that is unique to this event offering, enter it in the Information region. Examples might include guest speakers, special topics to be covered, or agenda changes. This information is available to sales representatives enrolling participants when they view the Event Offerings Summary window.

3. Use the Administrative Comments region to record information that is viewed only by event administrators. This information can be viewed only in this window.

4. Choose Save on the toolbar to add the specific information of an event offering to the database.

▶ **To record names of people involved in organizing an event offering**:

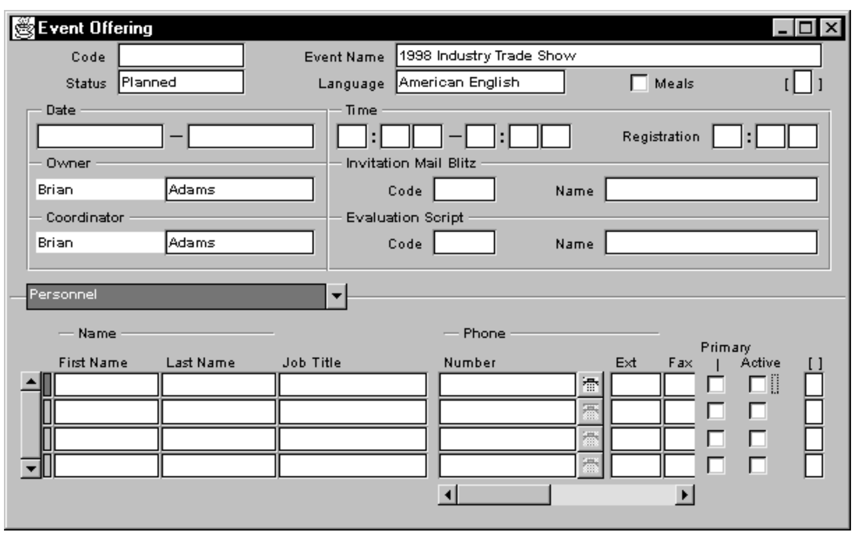
1. Choose the Personnel sub tab to enter the names of the people organizing this event with you.

   Examples include your caterer, equipment rental company, or event photographer. If you want to indicate that you are working primarily with one person, check the Primary check box.

2. Choose Save on the toolbar to add the names of people to the database.

▶ **To associate a letter with an event**:

1. Choose the Letters sub tab to associate letters with your events.



2. Choose an Action Type for the letter.

   Specified Date: The letter identified by letter name and letter code is sent to all event enrollees, whose enrollment status matches the value in the Enrollment Status field the first time you print event letters, on or following the date entered in the Mail Date.

   Status Change: The letter identified by Letter Name and Letter Code is sent to all event enrollees, whose enrollment status changed to the value in the Enrollment Status field since the last time you printed event letters. The Mail Date field is not applicable in this case.

An example using the Specified Date action type:

You are sponsoring a product roll–out for your new System 2000 on March 29, 1996. Two weeks before that date you send a letter to all contacts who are enrolled for this event offering and have a status of either *Enrolled* or *Confirmed* inviting them to a welcoming reception.

Action Type	Letter Code	Letter Name	Enrollment Status	Mail Date
Specified Date	13359	System 2000 Reception Invitation	Enrolled	15–Mar–1996
Specified Date	13359	System 2000 Reception Invitation	Confirmed	15–Mar–1996

Table 8 – 1 Example using Specified Date Action Type (Page 1 of 1)

The first time you print event letters, on or after March 15, 1996, a letter is sent to all guests who are either enrolled or confirmed for the System 2000 product roll–out. The *Completed* check box is checked so you can verify that the letters were sent.

An example using the Status Change action type:

You have a standard letter that you send to all contacts who are newly enrolled in an event offering. Enter the following information in the Event Letters window.

Action Type	Letter Code	Letter Name	Enrollment Status	Mail Date
Status Change	47953	Enrolled in Event	Enrolled	

Table 8 – 2 Example using Status Change Action Type (Page 1 of 1)

Since the Action Type field is *Status Change*, the *Enrolled in Event* letter is sent to each contact enrolled for this event offering whose status changed to *Enrolled* since the last time you printed event letters. In addition to new enrollees, the letter is also sent to anyone whose status might have changed from *Wait Listed* to *Enrolled*. Notice, however, that if a contact's enrollment status is initially set to *Confirmed* or if a contact is *Wait Listed* and then becomes *Confirmed*, the contact will not receive this letter.

Suggestion: You can define a single letter that you use to confirm enrollment for all your events and let Oracle Sales and Marketing's Letters module substitute the appropriate event name and time information when printing the letter for each guest.

- Use the list of values to select a letter name.

  The Letter Code field automatically displays the corresponding letter code.

Attention: A letter must be registered in Oracle Sales and Marketing before you can select it from the list of values. Choose the New Letter button to create a new letter and register it in the system.

- Use the list of values to select the Enrollment Status that an event enrollee must have to receive the specified letter.

Suggestion: You can send the same letter to enrollees with different Enrollment Statuses by repeating the values entered for the Action Type, Letter Name, Letter Code, and Mail Date fields (if applicable) and selecting a different Enrollment Status.

- Choose the mailing date for the letter.

Describing an Event Facility, Room, and Staff

You should enter a detailed description of a facility at which you plan to hold an event in the Event Facility window. Aside from name and address information, you can:

- Enter directions to the facility
- View a summary of offerings previously held at a facility
- Keep a list of facility staff names and functions
- Enter details about specific rooms at the facility

Once a facility is described, you can enter it in the Event Offering window as the location you plan to hold an event.

The header information on the Facility sub tab has the following fields:

Code: A number that uniquely identifies the facility. Your system administrator decides if this field is entered by you or is system generated.

Name: The name by which the facility is known.

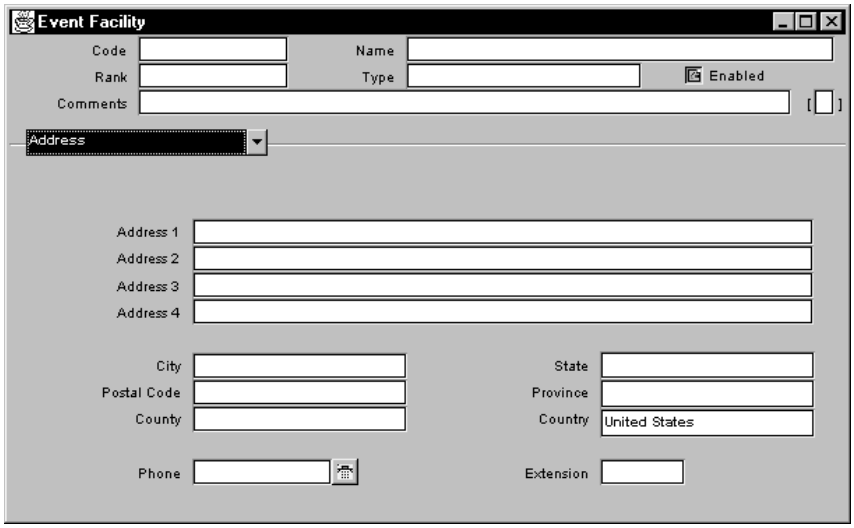
Rank: An indication of preference for this facility. Select from a list of values.

Type: Examples include convention center, hotel, and in–house. Your system administrator maintains the list of facility types.

Comments: Any information about the facility that you want to have readily visible. For example, ”Facility under renovation. Cannot book events here until after February 5, 1996.”

▶ To describe a facility address:

1. Select the Address sub tab.



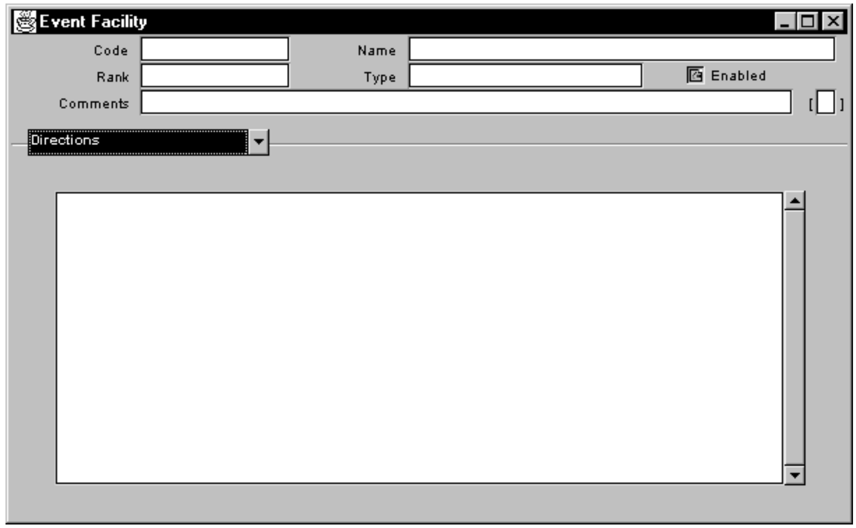
2. Enter the facility's business address, phone number, and any other information in the Address tab.

   This information is available to sales people enrolling contacts for a specific event when they view the Event Offering Summary window.

3. Choose Save on the toolbar to add the facility address to the database.

▶ **To enter directions to the facility:**

1. Select the Directions sub tab.



   You can enter several sets of directions to cover different approaches to the facility such as driving from the airport or from a particular direction.

   This information is available to sales people enrolling contacts for a specific event when they view the Event Offering Summary window.

2. Choose Save on the toolbar to add the directions to the facility to the database.

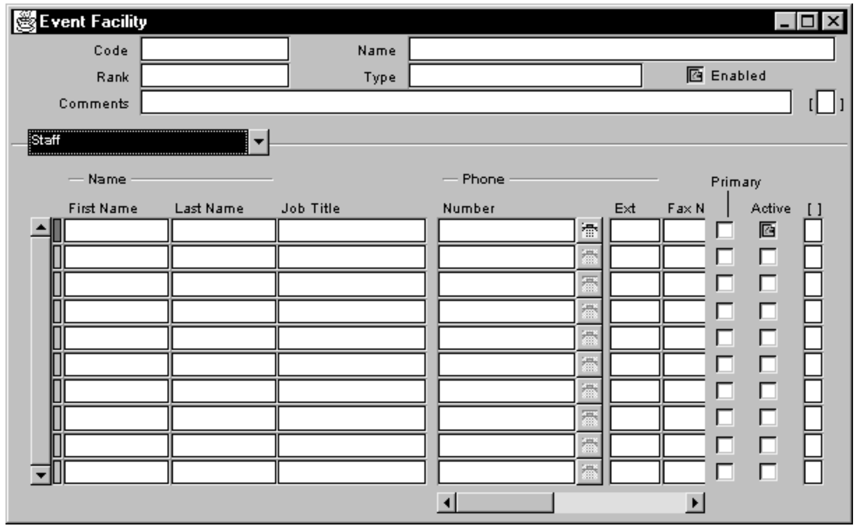
▶ **To review event offerings held at a facility:**

- Select the Event Offerings sub tab.

This region displays a summary of event offerings held at a selected facility regardless of the status of the event. Drill down on a selected line to open the Event Offering window where you can view event offering details such as date, time, cost, and enrollment numbers.

▶ To view, add to, or modify a list of facility staff:

1. Select the Staff sub tab.



Any existing staff information is listed.

2. Select a blank line to enter a new staff person.

   Enter first name, last name, job title, and telephone information by tabbing between fields. Use the comments field to enter any additional details about the person.

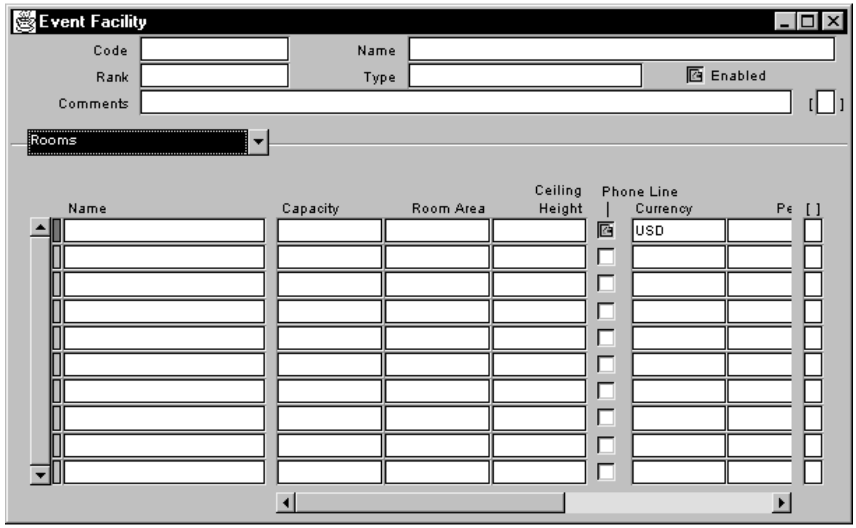
3. If appropriate, designate one primary facility contact by checking the Primary check box.

   The primary staff name defaults into the Staff Name field in the Event Offering window when you choose a facility for an event offering.

4. Choose Save on the toolbar to add the list of facility staff to the database.

▶ **To view, add to, or modify a list of facility conference rooms:**

1. Select the Rooms sub tab.



Enter information in the Room Name, Capacity, and Cost Per Day fields. The Comments field lets you enter any special details about the room.

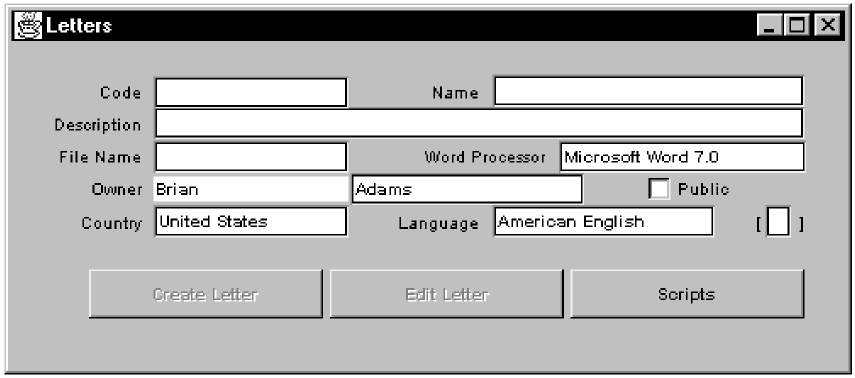
2. Choose Save on the toolbar to add the list of facility conference rooms to the database.

Creating New Event Letters

The Letters window lets you create and edit letters that you want to use to keep in touch with your guests throughout the event cycle.

▶ **To register a new event letter:**

1. From the Navigator, choose Events –> Letter.



2. Define the name of the letter for the event.
3. Provide a description of the letter.
4. Provide a file name for the letter, such as <*your event letter*>.doc, conforming to the 8 character or less filename convention.
5. Define the word processor.

   Select from the list of values.
6. Save the letter information.

   The Letter Code field automatically displays a new letter code.
7. Your name defaults as owner of the letter. You can select from the list of values to change ownership.
8. Check the Public check box if you intend this letter to be edited for public use (for example, to make it a letter that can be revised by all users for some generic purpose).

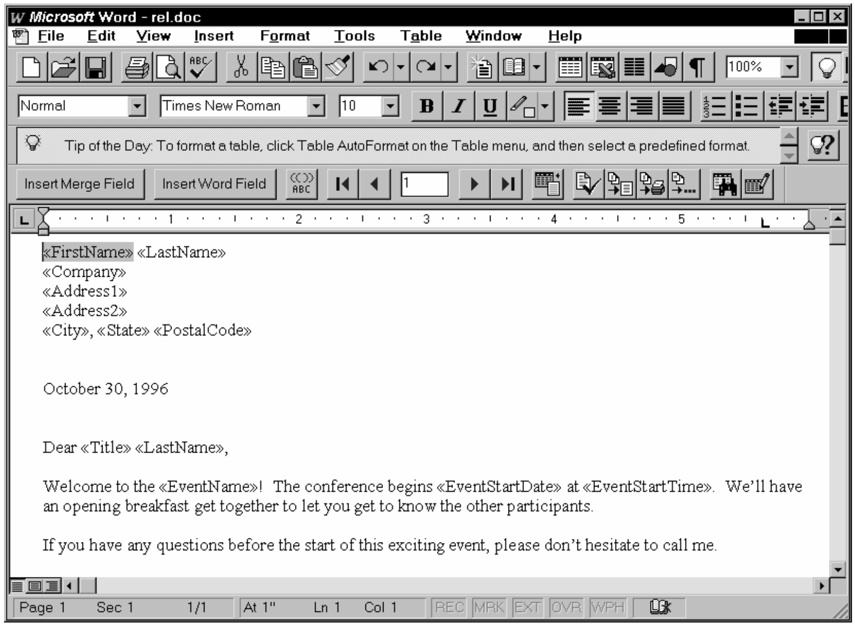
   Making a document *Public* means the document is editable by all users.
9. Select the country in which the letter will be sent.
10. Select the language in which the letter is written.

    The Language field does not change the language in which the letter is sent. If you have sets of letters that you create in multiple languages, use this field.
11. Choose Save on the toolbar to add the new event letter to the database.

▶ To create a new letter:

1. Choose the Create Letter button.
2. Edit the letter as you would any Microsoft Word document.

   Make sure that you observe the integrity of any merge file tokens.



3. Choose Merge File from the toolbar.
4. Include a letter code within the body of the letter.

   The letter code is used to identify the letter in merge operations.
5. Choose Save on the toolbar to add the new letter to the database.

▶ To edit a selected letter:

1. Bring up the letter, querying by Letter Code, by Letter Name, or by file name.
2. Choose the Edit Letter button.
3. Edit the letter and then save the edited version.
4. Choose Save on the toolbar to add the edited letter to the database.

▶ To associate a letter with a script:

You can tie a letter to a mail or telephone script by choosing the Scripts button on the Letters window. You can do this, for example, to make sure a followup letter is sent to reinforce the content or the outcome of the script.

You can associate a certain letter code with the call in number for a telephone script. You may have a mail blitz followed up with a telephone script campaign.

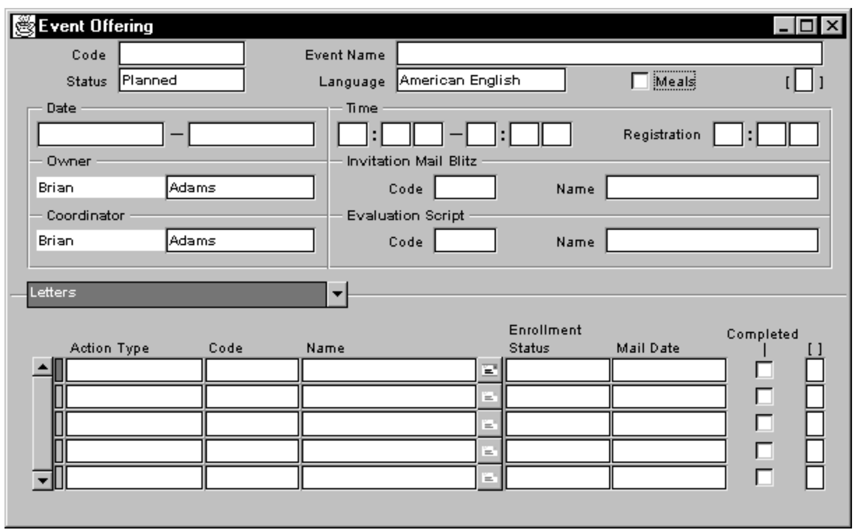
1. Select the code, name, and type of call script. You must use a currently registered call script. Select from the list of values.
2. Save the record.

   The script is associated with that letter.

▶ To process a mail merge:

You can send out a letter to the list of your registered participants.

1. From the Navigator, choose Events –> Offering –> Letter tab.



2. Select an action type. You can select one of two choices:

   Specified Date The letter identified by letter name and letter code is sent to all event enrollees whose enrollment status matches the value in the Enrollment Status field the first time you print event letters, following the date entered in the Mail Date fields.

Status Change: The letter identified by letter name and letter code is sent to all event enrollees whose enrollment status changed to the value in the Enrollment Status field since the last time you printed event letters. The Mail Date field is not applicable in this case.

3. Enter the letter code or select from the list of values.

   When you select a valid code, the name of the letter appears in the Name field.

4. Designate the status on which the letter should be sent. State that the letter should be sent to *Registered, Enrolled, Wait Listed,* etc.

5. Select a mail date for the merge.

   If you have selected Specified Date, and you want to start the merge now, select today's date for the merge.

6. From the Navigator, choose Events –> Letter Merge.

   In the Merge window, you'll see your job cued up.

7. Choose the Merge button.

   The Merge button opens Microsoft® Word 7.0. Your merge file is incorporated with your eligible enrollees from your event roster. You can inspect each record in the file.

8. Choose Print from the Microsoft Word File menu to print the merge.

   The letters are printed at your printer path designation.

Enrolling a Contact in an Event

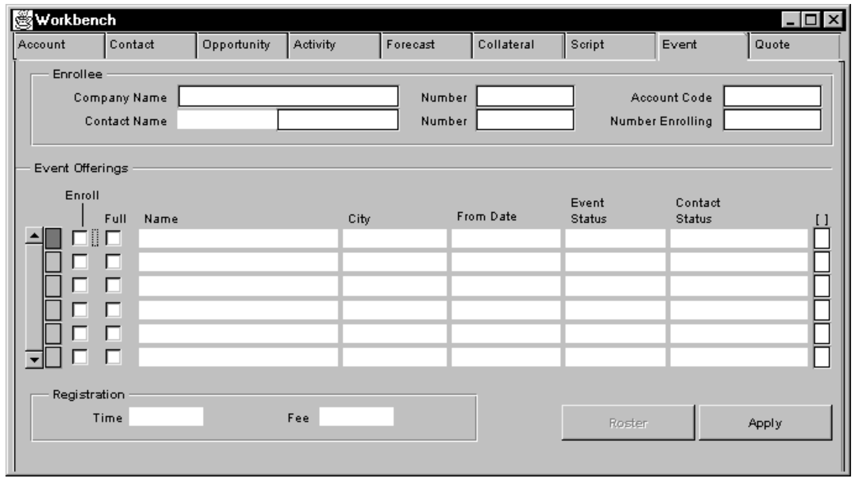
The Event window lets you enroll a contact into a scheduled event. When you query up the contact name in the Enrollee region of the window, that contact is considered the enrollee for any event you checked the Enroll check box for. You will get confirmation of the contact's enrollment status; if the event is full, the contact is wait listed.

You can view event offering information such as date, time, and enrollment numbers or status. You can also search for a specific event, or select Find All in the Query menu and view all event offerings, their dates, status, etc.

For more information on the specific event offering, drill down on the line for the event offering. The Event Summary window opens.

▶ To enroll a contact in an event:

1. Select the Event tab.



2. Enter the name of the contact in the Enrollee Region.

Attention: A contact must be *in* the database before you can enroll them in an event.

3. Enter the number being enrolled in the Number Enrolling field of the Enrollee region.

   If you are enrolling more than one person under this contact's name, indicate the total number in this field.

4. Check the Enroll check box next to each event name to enroll a contact.

   If the Full check box is checked, you cannot enroll a contact, but you will be given the option of placing the contact on the wait list.

5. Choose Save on the toolbar to add the enrollment of a contact in an event to the database.

▶ To enroll a contact in several events and vary the number enrolled:

If the number of people being enrolled under a contact's name is different for each event, perform the following steps:

1. Enter the number being enrolled in the first event in the Number Enrolling field.

2. From the Find Event Offerings window, enter the appropriate criteria.
3. Choose Find.
4. Check the Enroll check box next to the event name to enroll the contact.
5. Choose the Apply button.
6. Change the Number Enrolling field to the number to enroll for the second event.
7. Check the Enroll check box next to the second event.
8. Choose the Apply button.

   Because the check box for the first event is still checked, a message appears saying that the contact is already enrolled for this event. A second message confirms the enrollment in the second event.

   Continue with this process if there are other events to enroll the contact in with different enrollment numbers.
9. Choose Save on the toolbar to add the contact to the events to the database.

▶ **To enroll additional contacts:**

1. Place the cursor in the Contact Name field and use the list of values to select a different contact.

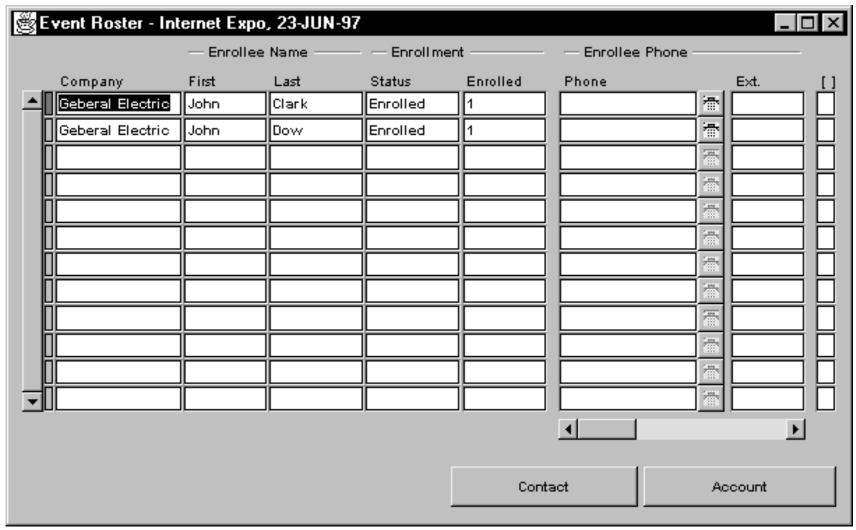
   The contact's identifying information appears in the Enrollee region. The Event Offerings information remains the same as for the last contact.
2. Check the Enroll check box to enroll the contact for the selected event(s).
3. Choose Save on the toolbar to add the additional contacts to the database.

Updating and Viewing an Event Offering Roster

This section describes how you can view the list of people enrolled for a selected event on a roster. You may update enrollment statuses within the roster, if appropriate.

▶ **To update or view a roster for a selected offering:**

1. Choose the Roster button to see all contacts enrolled for the selected event. The following fields appear.



Enrolled: The number enrolled under this contact's name.

Status: The enrollment status for this contact. Select the list of values in the status field to view your options.

Unless you are the Events Administrator, there are a few restrictions to the status changes you can make. For example, you cannot change the status of a Wait Listed contact to Confirmed.

Once an event is complete, the Event Administrator can update the roster to reflect actual attendance by changing Enrolled and Confirmed guests to Attended or No Show. Use the Walk–in status to add contacts who enroll on the day of the event.

Date: The date the contact enrolled for the event.

Payment: Enter any fees collected from the contact.

Attended: The number of guests who attended the event under this contact's name. This number defaults to the number enrolled. You can change this, if necessary.

2. Choose Save on the toolbar to add the updated enrrollment to the database.

Entering Answers to an Event Evaluation Form

An Event Evaluation form for your use is provided to assess the impact of your events. Use the script specified in the Event Offering window to process event evaluations.

▶ **To enter answers to an event evaluation:**

1. In the Event Offering window, locate an event offering to process event evaluations.
2. Choose the Roster button to display a list of enrollees for the selected event.
3. Choose the Script button.

   If the script specified in the Event Offering window is:

   - A mail script, the Process Mail Response window opens.
   - A call script, the Use a Call Script window opens.
4. Enter the answers written on the event evaluation.
5. Choose Save on the toolbar to enter the answers to the database.

Overview of Mail Merge

Oracle Sales and Marketing lets you use a word processor to create letters and perform a *mail merge*. A mail merge is an efficient way to personalize a form letter, taking your database of customer information such as address and salutation, and customizing a form letter with the individual customer data.

For example, you can make up a letter to 50 customers notifying them of the specific product they are interested in. Using the *mail merge tokens*, you can plan the letter to insert items of information from your database, such as name, address, company name, product interest, and any other customer specific information. Your basic letter contains the generic wording; but when you use the mail merge facility, you can generate 50 custom letters.

Microsoft Word® 7.0 is the default word processing application, but another word processor can be substituted.

Each word processor uses slightly different terminology when describing the steps to perform a mail merge. In general, there are two files involved:

- A *form letter* that contains text that always remains the same, and tokens such as *Account Name* and *Contact Name* where actual values are inserted. Microsoft Word calls this file the *main document*. WordPerfect calls this the *primary file.*
- A *merge* file that contains the information that changes in each letter, such as an account name or a contact's name and address. The merge file can contain information on a single contact or on a list of contacts. Microsoft Word calls the merge file the *data source.* WordPerfect calls this the *secondary file.*

When you perform a mail merge, the tokens in the form letter tell the word processor where to put the information from the merge file. The form letter and the merge file are combined to create a personalized letter. You can print this file using your word processor's print command. It is not necessary to save the file, because it is easily recreated by performing another mail merge.

Additional Information: Refer to your word processor documentation for more detailed information on mail merge.

Performing a Mail Merge

Oracle Sales and Marketing lets you send personalized letters to a list of people with specific information inserted into a form letter. The form letter is usually connected to a promotion or an event, allowing you to use address and product interest information gathered about a list of prospects or enrollees, and selectively insert that information in the letter. For example, the same letter may need to be sent to all people enrolled in a certain seminar or training program.

You can set up a mailing to be sent at a *Specified Date*, for example, to welcome all participants in a seminar a month ahead of time. You can also order a mailing as the result of a *Status Change*. In this case, if a person is *enrolled* in a seminar, and their status changes (payment is received, for example) to *confirmed*, a letter is automatically sent confirming the details of their seminar or training program.

Prerequisites

The path must be set correctly to your word processor and to your Oracle database. When you select New Letter, or Edit Letter, Microsoft Word 7.0 opens and indicates the correct path. When both paths are set correctly, Oracle Sales and Marketing automatically presents the correct template for a form letter or locates a form letter and inserts the merged information in the form letter. See your system administrator if your path is not set correctly.

The following instructions are specific to the task of event letters.

▶ **To perform a mail merge:**

1. Register, then create a new letter using tokens from the Insert Merge Field menu to create merge fields *or* select an existing letter.
2. Edit the new letter as appropriate.
3. Choose the Save and Proceed button on the toolbar.
4. From the Navigator, choose Events –> Offering.
5. Find the event associated with the letter and open the Event Offering window.
6. Choose the Roster button.

   The event roster contains line entries for each enrollee in the event. In addition to name, address, company name, telephone, etc., the status column contains a list of values including: enrolled, confirmed, walk in, and cancelled. Leave the window open.

7. Choose the Letters button from the Event Offering window.

   The Event Letters window opens. Notice that the title of the event, its code number, and the date it takes place are shown on the title bar.

   Fill in the information about the letter in the first available blank line.

   The columns are labeled:

   Action Type: Determines when the letter will be sent. Your choices are either *Specified Date,* meaning to be mailed on or after a specified date or *Status Change,* where a letter is sent upon enrollment status change.

   Letter Name: You may either type in the name of your letter, or choose from the list of values.

   Letter Code: You may either type in the letter code assigned when you registered the letter, choose the code from a list of values, or the code may have been filled in when you selected the title of the letter.

   Enrollment Status: Select the enrollment status of the people who will receive the letter. For example, you may want a confirmation letter sent when a person's status changes from Enrolled to Confirmed, to give the attendee further instructions or confirmation of receipt of payment.

   Mail Date: Enter the date of the mailing if you selected *Specified Date*.

8. Choose Save and Proceed from the toolbar.

   The Navigator opens.

9. From the Navigator, choose Event –> Letter Merge.

   The Letter Merge window opens.

   The path and the merge file name appear in the Name column. The word processor name appears in the Word Processor column.

10. Choose the Merge button.

    The form letter appears, and the information from the events roster is compiled with it. Form letters appears on the screen, as many as there are records fulfilling the criteria you have specified.

Suggestion: Use the screen document to proof read the letter for format and content. You can scroll through the output, or choose the Test Merge button from the toolbar in the Microsoft Word application to see an individual letter.

▶ **To print the merged letters locally:**

- Print the letters as you would any other document at your local printer. Use Print Preview to inspect the individual letters before printing.

▶ **To send the merge letter request to an Order Fulfillment department:**

- The event merge request is registered and recorded within Oracle Sales and Marketing when you enter information in the Event Letters window. If you have a connection to an Order Fulfillment department, they can access and create event letter merges just as you would locally. See your system administrator for more information.

CHAPTER

9

Mailings

Oracle Sales and Marketing provides several alternatives for setting up and sending out literature to your customers. You can order collateral and have it processed through your Order Entry system, or if you process your collateral orders locally, Oracle Sales and Marketing provides a repository for your sales and marketing collateral. We provide a facility for customizing and sending out form letters with your collateral. We also let you track and evaluate the effectiveness of your campaigns.

The following topics are included:

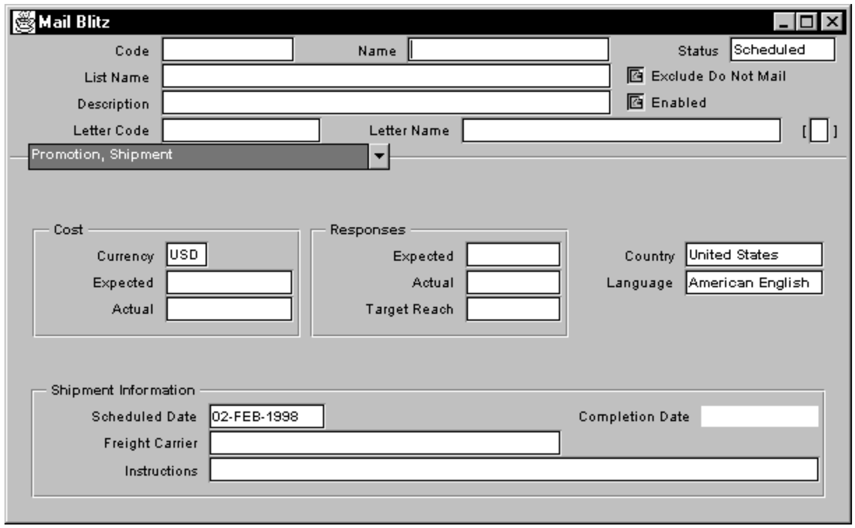
The following tasks are included:

Creating a Mail Blitz

Oracle Sales and Marketing lets you build and execute direct mail efforts. In addition, you can track the direct marketing efforts by automatically keeping statistics on the response to the campaign.

▶ **To create a new mail blitz:**

1. From the Navigator, choose Mailings –> Mail Blitz to open the Mail Blitz window.



2. Enter a name for the new blitz.

   Your system administrator determines if a blitz code is system generated or entered by you. If the code is system defined, a new code is generated for the blitz, when you save the mail blitz record.

☞ **Attention:** If you plan to track mass mailing responses, include the blitz code somewhere in the letter template. This code can then be entered in the Promotion Code field of the Find Account or Contact window and will add to the response statistics of your campaign.

3. Enter the mailing status (the status must be set to *Scheduled* for blitz to be set up) in the Blitz Status field.

4. Use the list of values to record the name of the mailing list you are using for the Mail Blitz in the List Name field.

Attention: List names are entered and maintained in the Lists window.

5. Enter either the Letter Code or Letter Name of the Mail Blitz cover letter.

   You can edit an existing letter by choosing the Edit Letter button.

   You can create a new letter by choosing the New Letter button.

6. Enter cost and response information in the Promotion Information.

   The Actual field in the Responses region automatically increments by one each time the Mail Blitz code is referenced in the Find Account and Contact window.

   Target Reach is the total amount of coverage you expect the Mail Blitz to have, generally the number of names on your mailing list.

7. Use the Requested Items alternative region to select any collateral that is included in the mail blitz.

   See: Sending a Collateral Package to a Contact: page 9 – 15 for additional information.

8. Choose Save on the toolbar to add the new mail blitz to the database.

Creating Letters

You can create specialized public letters to be used by all salespeople and make specialized signatures available electronically using the letters and word processing module within Oracle Sales and Marketing.

First, register the letter by filling in all the information in the Letters window; then choose the Word Processor button to create the text and format.

Registering a Letter

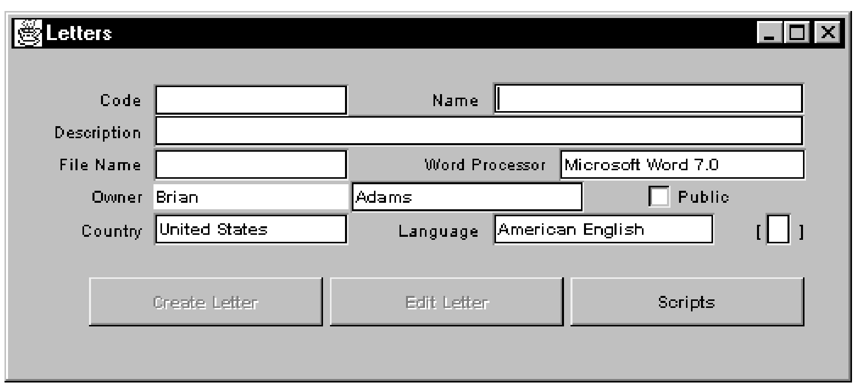
The Letters window lets you create new letters that can be used for event invitations, event followups, and collateral cover letters. Once the title of the letter is registered, it can be called up from the list of values, or searched for by name.

You can access the Letters window from the Navigator, from the Send Collateral Package window, or, if you are an event administrator, from the Event Offering window.

▶ **To register a letter:**

1. Choose Letter from the Navigator to open the Letters window.

   You can also open the Letters window from the Collateral window by choosing the New Letter button.



2. Enter a code, name, and description for the letter you want to register.

   Code: A number that uniquely identifies a letter. Your system administrator determines if this number is system or user generated.

   Name: The name by which you want to identify this letter in Oracle Sales and Marketing. The letter name appears in the list of values showing all available letters.

3. Enter the word processor information.

   A *File Name* is the word processor file name of the letter you are registering. You do not need to enter the disk drive or directory name. Your system administrator sets up a default directory to store all letter files.

4. Choose Save on the toolbar to add the registered letter to the database.

▶ **To allow public access to the letter:**

- Check the Public check box. This makes the document editable by all. All users with access to the server can take a copy of this document and edit it.

Creating Letters

Once a letter is registered in Oracle Sales and Marketing using the Letters window, use Microsoft® Word for Windows to create your business letter.

☞ **Attention:** Prerequisites: Microsoft® Word 6.0 or later for Windows must be installed on your computer in the proper directory. If properly installed, the application will automatically open when you chose the New Letter or Edit Letter button. See your system administrator if your path is set incorrectly.

▶ **To create a letter:**

1. Choose the New Letter button in the Letters window to open Microsoft® Word for Windows.

2. Select either the Event or Generic template.

   The Event and Generic templates contain fields called tokens specific to Oracle Sales and Marketing, such as company name, contact name, address, and phone number. The Event template additionally includes tokens specific to events such as Event Date and Event Location.

3. Choose OK.

   Word closes the template window and opens the selected template.

4. Modify the letter, as appropriate.

   You'll note the template already contains blocks of information surrounded by carets. These are *merge field tokens*. These tokens place information at points in the letter. To see the list of available tokens, choose the Insert Merge Field button on the Mail Merge toolbar. Select any token in this list to add it to your letter.

   You can modify the template by adding, changing, or deleting text and by adding, changing, or deleting tokens. You may need to place punctuation around merge fields, such as placing a colon after the tokens in the salutation line.

   ☞ **Attention:** Do not introduce extra carriage returns or extra spaces around the merge field tokens. The letter is automatically constructed to accommodate the inserted information, placing carriage returns at the appropriate points.

   To delete a token from your letter, select the token, and then press the Backspace or Delete key.

5. Insert the LetterCode token in the letter.

   Each letter must contain the LetterCode token so Word can match the form letter with the merge file when you perform the actual mail merge. You can put this token anywhere in the letter, for example, near the bottom margin. Your template may already contain this token. Do not modify it.

6. Choose Save on the toolbar to add the created letter to the database.

▶ **To add a scanned signature to your letter:**

If you have a scanned image of your actual signature stored in a Word–supported picture format, you can copy the image of your signature into the letter.

1. Place the cursor at the point you want your signature to appear.
2. Choose the Picture command from the Insert menu on the menu bar.
3. Choose the file name in which your scanned signature is stored.

4. Choose OK.

   Your signature appears in the letter.

▶ To add a mock–signature made with WordArt:

You can use Microsoft® WordArt to create a mock signature. This will not be an exact replica of your signature because it is only a script–like graphic not a scanned image.

1. Place the cursor at the point you want the signature to appear in the letter.
2. Choose Object from the Insert menu.

   The Object window opens.
3. Choose Microsoft® WordArt 2.0 from the Object Type list box and choose OK.

   A text box entitled *Enter Your Text Here* opens.
4. Enter your name in the text box.
5. Choose the Update Display button to see how your entry looks in the letter.

   You can change the text effect by selecting different options from the WordArt menu and toolbar.

   To create a script–like signature, choose Plain for the text Shape, Brush Script MT for the Font, and Best Fit for the Size.
6. Close the *Enter Your Text Here* box when you have finished.

▶ To preview the merged letter:

1. Choose the View Merged Data button.

   The Word data source file is displayed, showing the customer information merged into the template document.

▶ To save the letter:

1. Select Save As from the File menu on the menu bar to open the Save As window.
2. Select the drive that your system administrator has created to store Oracle Sales and Marketing letters.
3. Select the directory where Oracle Sales and Marketing letters are saved.

The Directories list box shows the directory tree for the drive you selected in the previous step. Verify the proper path, as specified by your system administrator, is selected. You can double–click on a directory name to open or close it as required.

4. Enter the file name in the File Name text box.

   If you did not enter a name in the File Name field of the Letters window before opening Word, make sure you remember the name you enter here because you'll enter this same file name in the File Name field in the Letters window once you return to Oracle Sales and Marketing.

   If you did enter a name in the File Name field of the Letters window before opening Word, make sure you use the same file name here otherwise Word will not be able to locate the letter when it performs the mail merge.

   If you entered a name in the File Name field of the Letters window before opening Word, make sure you enter the same name here.

5. Choose OK to save the letter.

▶ **To return to Oracle Sales and Marketing:**

- Choose Exit from the File menu on the menu bar.

  Word closes and returns you to the Letters window.

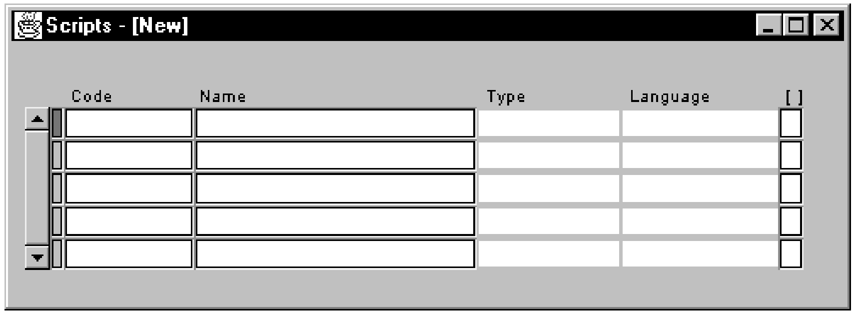
Associating a Script with a Letter

You can associate a mail or call script with a letter campaign. When a Promotional Code, displayed somewhere in the letter, is entered into Oracle Sales and Marketing, the corresponding script will be called up.

When a prospect responds to a mailing, for example, by calling in and giving a particular extension, the telemarketer can enter the Promotional Code into Oracle Sales and Marketing and bring up the telephone script.

▶ **To associate a script with a letter:**

1. Choose the Scripts button to open the Scripts window.



2. Select a script from the list of values.

3. Choose the Save and Proceed button from the toolbar.

   When a prospect inquires or follows up about a promotional letter, the call script associated with the letter can be retrieved.

Viewing or Editing a Letter

Microsoft® Word for Windows is the word processing application used within Oracle Sales and Marketing. You may already be familiar with its capabilities and features.

▶ **To locate an existing letter from the Navigator:**

1. Choose Mailings from the Navigator, then choose Letters.
2. Choose Enter from the Query menu.
3. Enter your search criteria, as appropriate.

   Use any combination of code, name, description, or file name to locate the letter.
4. Choose Run from the Query menu.
5. Locate the letter.

▶ **To save the edited letter:**

- The *Save* command will overwrite the existing letter with your modifications. You may, or may not want to overwrite a public letter or a personal letter that contains generic information.
- The *Save As...* command lets you choose a new file name for the letter, creating your edited letter as a separate file, leaving the original letter in its unaltered condition.

Collateral Fulfillment

Oracle Sales and Marketing provides three methods of collateral fulfillment, described below:

Order Entry: Collateral is requested using Oracle Sales and Marketing; the request is transferred to Oracle Order Entry as an order to be picked and shipped by your warehouse staff.

Fulfillment House: Collateral is picked and shipped by an external organization designated by your company as a fulfillment house.

Neither: Collateral is handled locally within your organization. If collateral orders are filled locally, your PC needs to be set up with letter merge capability to print the cover letter that accompanies the collateral pieces.

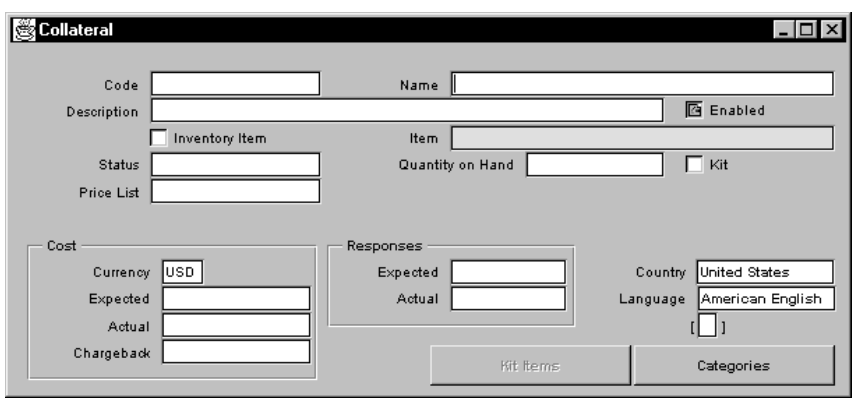
See your system administrator for more information.

Manually Defining Collateral Pieces

All collateral pieces must be registered within Sales and Marketing giving each piece a unique, identifying number. Your system administrator makes the decision whether your collateral pieces are assigned a number by the system, or by your input. Each piece is registered through the Collateral window. That is how it shows up in the list of values. You cannot order a collateral piece through the system that is not registered through Sales and Marketing.

▶ To manually define collateral pieces:

1. From the Navigator, choose Mailings –> Collateral.



2. Use the Collateral window to enter new collateral items and link a piece of collateral to a kit or category.
3. To view a list of all collateral items, choose the list of values.
4. To register a new piece of collateral, enter information in the following fields:

   Code: Indicates the unique identifying code for that collateral item. Your system administrator has set this to be system–assigned or user–assigned. If your code is system generated, supply all other information; then, when you save the record, the system generated code number appears.

   Name: Indicates the title of the collateral item.

   Description: Contains a short abstract of the collateral contents.

   Inventory Item check box: Indicates whether the collateral piece is also defined in Oracle Inventory. If it is, then you enter the inventory item number in the Item field and Oracle Sales and Marketing defaults some of the remaining fields from information out of Oracle Inventory.

   Status: Indicates the availability of a collateral item. If your site does not want to update this field, your system administrator may choose to set the Status field to Unknown.

   Quantity on Hand: Updates manually.

   Costs: Applicable if there is an actual cost or chargeback associated with the collateral piece. Your site maintains this information.

   Responses: Lets you record promotional information about a collateral piece, such as the number of responses you *expect* to receive as a result of the collateral piece. The *actual* field is incremented when there is a response, such as:

   - The collateral item is part of a promotion and the promotion code is entered within the Interaction window.
   - The collateral item is tied to a script and script answers are committed.

   Country: Lets you specify a country. Select a country from the list of values.

   Language: Indicates the language in which the collateral is printed.

5. If appropriate, choose either of the following buttons to add more information about the collateral:

   - The *Kit Items* button takes you to the Kits window where you can bundle collateral into a named package.
   - The *Categories* button lets you add the new collateral item to your existing collateral categories. Collateral categories let you group collateral pieces regarding a given campaign or product. Conversely, you can use the collateral categories feature to search for all collateral pieces that describe a given product or service.

   Attention: You need to set up collateral categories first to add collateral items to the categories. To set up a new collateral category, choose Setup –> Promotions –> Collateral Categories.

   For more information on collateral setup issues, see the *Oracle Sales and Marketing Implementation Guide.*

6. Choose Save on the toolbar to add the defined collateral pieces to the database.

Assembling Kit Items

There is a distinction to make between kits that are defined in Oracle Inventory, and those defined within Oracle Sales and Marketing.

A kit defined in Oracle Sales and Marketing is given an OSM unique item number. All items within that kit must have OSM item numbers. You may include items to be ordered from Inventory. Any items you order from Inventory must have an inventory part number.

If you want to order an Oracle Inventory kit, you must define that kit within OSM as an OSM collateral item. You can then include that item in Oracle Sales and Marketing as a kit item.

Any collateral item, whether it is retrieved locally or through Oracle Order Entry/Inventory, *must* have an OSM item number. That item can *also* be defined as an Inventory item.

Sending a Collateral Package to a Contact

You can select a cover letter and bundle it with a collateral item or collateral kit for shipment to a contact. There are two methods you can use to process a collateral package:

- Print the letter locally and manually select on–hand collateral
- Send the letter and collateral request to your external fulfillment house or internal shipping department

▶ **To select letter, address, and shipment information:**

1. Select the Collateral tab in the Telemarketing Workbench.
2. Select the contact you want to send the collateral to.
3. Select a letter code or letter name.

   All collateral packages must be sent with a cover letter. With the cursor in either the Letter Code or Letter Name field, use the list of values to select an appropriate letter.

   ☞ **Attention:** If you have a standard letter that you include with all (or most) of your collateral packages, you can have Oracle Sales and Marketing automatically fill the Letter Name and Letter Code fields by entering the name of the letter as your default letter in the Personal Profile window.

4. Select a mailing address for the collateral package

   Select either Work Address or Private Mailing Address.

   If you enter or change a private mailing address here, the change is reflected in the Contact Detail window when you next query the contact information.

5. Verify shipment, merge file, and/or fax information.

   If an external fulfillment house or an internal shipping department handles collateral shipments for your company, select the Shipment, Merge File tab to enter shipping instructions for them. Your system administrator can set up default values for the Scheduled Date and Freight Carrier fields. Description of the fields in the Shipment, Merge File tab are as follows:

   Scheduled Date: The date the collateral and letter are scheduled to be sent. Your system administrator can set up a default value.

   Freight Carrier: The name of the company who ships the package. Your system administrator can set up a default value.

Instructions: This field lets you record any extraordinary instructions you have for the fulfillment house or shipping department.

Order Number: This number is automatically assigned once your order is received by the fulfillment house or shipping department.

Fax: This field is used for reference purposes in case you want to fax any portion of the collateral package to the contact. Choose a fax number from the list of values or enter a different number in this field, as appropriate.

▶ To print a letter without collateral at your local printer:

- Choose the Print Letter button to automatically create a merge file for the selected contact. You can use this merge file in your word processor.

▶ To request familiar collateral items:

1. Enter items directly into the Requested Items tab window.

   Use this method if you know the code, item, or name of the item you want, or if the list of values is short so that you can easily select items from the list.

   Your list can include both collateral kits and single collateral items:

   Code: A unique number assigned to each collateral item or collateral kit when it is entered in the system. You can select from the list of values.

   Inventory Item: Use this field only if the collateral piece is registered as an inventory item in Oracle Inventory. Item is the inventoried part number of a collateral item. You may select from the list of values.

   Name: The title, for example *Oracle8 Server Administrators Guide* or *Introduction to Oracle Materials Resource Planning.*

2. Specify the quantity to order in the Quantity field.

3. Confirm the details of the order:

   Status: Indicates the availability of a collateral item. Possible values are: Back Ordered, Collateral Kit, In Stock, Obsolete, or Unknown. The Status field is manually maintained. If your site does not want to update this field, your system administrator can choose to set the Status field to Unknown.

   Chargeback: Records the internal cost of a collateral item.

Warehouse: Lets you specify ship–from location of collateral. This is usually a single default value. However, if your company has multiple warehouses, you may be able to use the list of values to select a different warehouse.

▶ **To view a list of collateral categories and items:**

1. Choose the Select Items button.

   Within the Select Items window, Collateral Categories are displayed on the left, and Collateral Items are displayed to the right.

2. Drill down on a category to view the related items. To select an item, press Ctrl+click or Ctrl+Shift. Selected items are highlighted. The total of your selected items is displayed in the upper right.

   The total quantity of a collateral order is designed not exceed 5 pieces, unless your system administrator has adjusted the default setting. A maximum order of 5 pieces in intended to limit specious ordering of collateral.

3. Choose OK to add collateral items to your request.

   The collateral you requested is displayed in the Requested Items region.

▶ **To submit the collateral request:**

- Choose Save from the Toolbar to complete your request.

  The system confirms that your order is changed from Pending to Ready.

▶ **To leave the collateral request pending:**

1. Choose Save from the Toolbar.

   A window opens asking if the request is ready to be submitted. Choose No to keep the status pending.

2. Choose Enter from the Query menu to search for the pending request and change the status to Ready when you are ready to submit the collateral request.

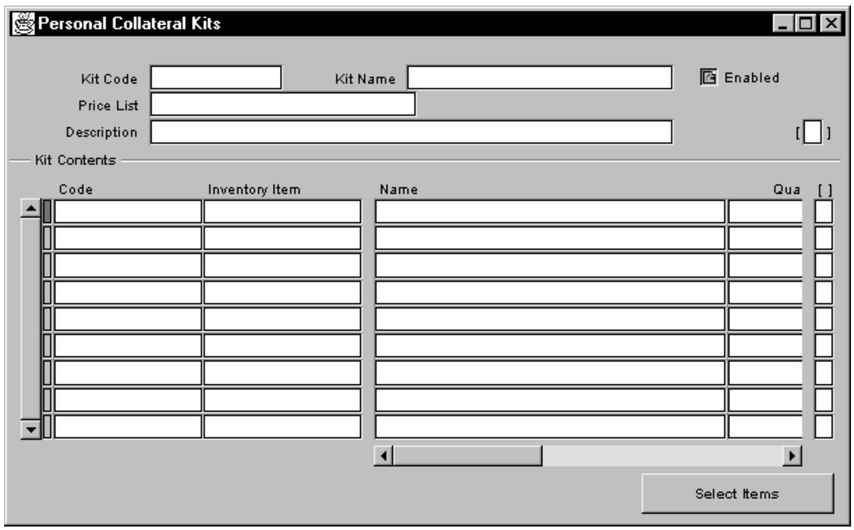
☞ **Attention:** If your request is complete but you don’t want the collateral items mailed today, you can still submit your request. Enter the date you want the collateral mailed in the Scheduled Date field of the Shipment tab window. You can then submit your request but it will not be processed until the specified date.

Creating a Personal Collateral Kit

If you have collateral items that you often send together, you can bundle them into a kit that can then be referenced as a single collateral item. You can also create personal collateral kits for your own use. You can have as many kits; the same collateral item can be listed in more than one kit.

▶ **To create a personal collateral kit:**

1. From the Navigator, choose Mailings Personal Collateral Kit to open the Personal Collateral Kits window.



2. Name the kit and give it a description.
3. Enter the collateral items you want in your kit in the Kit Contents region.

   Code: A unique identifier for the collateral kit. Your system administrator decides if kit code is system or user generated.

   If you are familiar with the items you want in the kit, you can enter them directly into the Kit Contents region. If you do not know the names of the collateral items to include in the kit, choose the Select Items button to view and select collateral items by category. You may also use the list of values key to see a list of all collateral items.

4. Choose Save on the toolbar to add the personal collateral kit to the database.

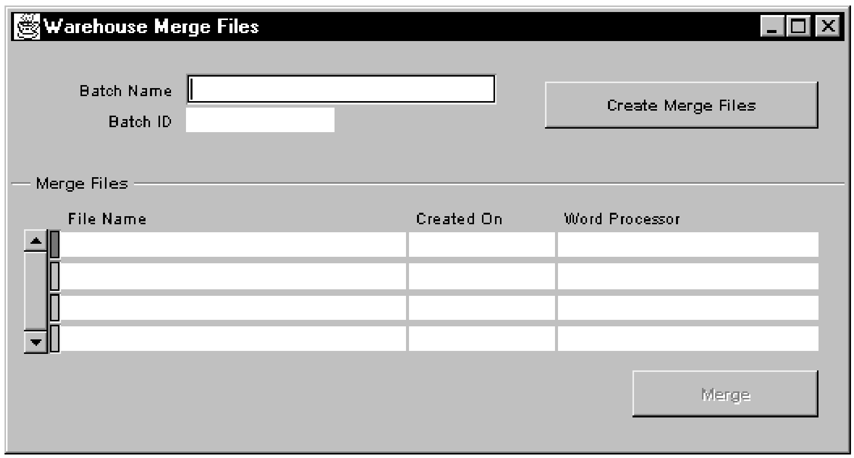
   See: Sending a Collateral Package to a Contact: page 9 – 15.

Creating Warehouse Merge Files

If you combine a cover letter with collateral to be sent out from a warehouse location, you can set up the letter file and merge information, then forward the batch name and batch ID to your warehouse for assembly and shipping.

▶ **To create a Warehouse Merge File record:**

1. From the Navigator, choose Mailings –> Letter Merge.



2. Select the batch name you have set up for the collateral merge within the Telemarketing Workbench.

   Attention: Setting up a batch process requires Oracle Shipping installed on your system, and requires you to establish a batch process within Pick Release –> Release via SRS.

3. Choose the Create Merge File button.

   The files you have designated for the batch should appear in the Merge Files region. The file name, followed by the word processor file type.

4. Choose the Merge button.

   The letter and address information are merged, just as when a mail merge process is created, only this screen is intended for use by warehouse personnel to receive your collateral request and combine it with your outgoing collateral order.

Using Mailing Lists

The List Workbench window provides a repository for mailing lists. You can keep account, contact, lead, or one time lists. In addition, you can choose to list the availability of the list online or make it a private list.

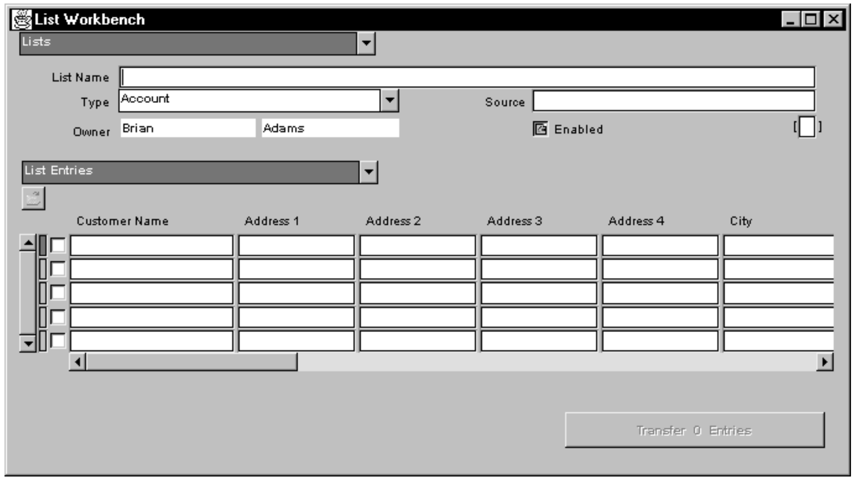
You can use the List Workbench window to review and use mailing lists for your sales or promotional campaigns. Mailing lists available to you are displayed in this window. An active list is denoted by the Enabled check box.

When you enter a list name, Oracle sales and Marketing records you as the owner of the list. You can then reassign the list to another member of the sales force by choosing the member’s name in the Assigned To field. Finally, you can designate where you obtained the list in the Source field.

To retire a list that is no longer accurate or useful, uncheck the Enabled check box.

▶ To use a Mailing List:

1. Navigate to Mailings –> List Management –> List Workbench to open the List Workbench window.



2. From the Query menu, choose Find All.

   All available lists are displayed.

3. To use a list, enter the list name.

CHAPTER

10

Handling Promotions

This chapter describes how you can use the promotions module in Oracle Sales and Marketing to create and track responses to promotional campaigns.

The following topics are included:

The following tasks are included:

Overview of Promotions

A promotion is a planned marketing activity that you conduct to generate sales leads or promote good customer relations. You can create the following types of promotions to help with your marketing activities:

Advertisement: A marketing notice placed in a print or broadcast medium.

Blitz: An outbound fax, mail, or telephone marketing campaign directed towards a target list of suspects and contacts.

Collateral: A piece of material that you can send to a contact, ranging from a simple information leaflet to a glossy brochure or computer demo diskette.

Event: A promotional event, such as a trade show, seminar, or training session having a predetermined time, date, and location, and optionally a list of registered guests.

Letter: A letter you send independently or with a collateral fulfillment or mail blitz package. A letter can include predefined mail merge tokens representing account, contact, or event information.

Letter, in this case, is specific and disregards that generally collateral and letters do not have to be used as part of a formal marketing promotion. For example, a sales representative often sends letters and collateral to contacts during a normal work day.

Program: A series of marketing promotions that make up a larger marketing effort. For example, a product launch program might involve one or more advertisements, blitzes, and events.

You can also use this category to track indirect marketing activities, such as word of mouth, that result in lead generation.

Script: A predetermined series of questions for use during telephone calls with contacts, to mimic the questions on mail–in response cards, or to record a contact’s evaluation of an event. You can predefine answers for each question. You can also assign actions for the system to automatically perform when a contact gives a specific answer.

Tracking Promotions

Each promotion has a unique promotion code that you can use to track the effectiveness of your various marketing activities. For example, you can include a promotion code in the text of a letter, or you can disguise it as a telephone extension number or a fictitious sales representative's name. When a prospect calls in response to a promotion, you can either ask for the promotion code or let the prospect indicate it automatically when requesting the telephone extension number or sales representative's name (which is actually the promotion code).

The Estimated Response Field

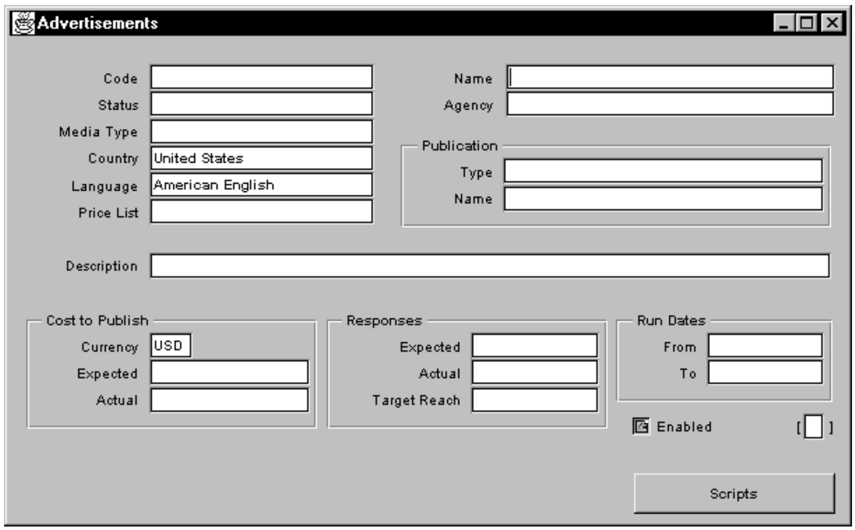
The window for each promotion type, except letters and collateral, has an Estimated Response field where you can enter the number of responses you expect to receive for that promotion and an Actual Response field that displays the responses actually received. When a contact calls in response to a promotion, you enter the promotion code in the Find Account or Contact window along with the contact's name. Each time you enter a particular code, the Actual Response counter for that promotion increases by one. By comparing the estimated and actual responses for a single promotion or comparing values between several promotions, you can gauge the effectiveness of your marketing promotions.

Tracking Advertisements, Expenses, and Results

The Advertisements window lets you track the effectiveness of your advertising campaigns. For each advertisement you can record media used, costs, responses, and run dates.

▶ **To create a new advertising record:**

1. From the Navigator, choose Promotions –> Advertisement to open the Advertisements window.



2. Enter a name for the program, and if not system generated, enter a code for the campaign.

   Your system administrator determines if the code is system generated or entered by you.

☞ **Attention:** If you plan on tracking advertisement responses, you'll need a method for identifying each individual advertisement to which a contact responds. For example, for print advertisements, include the code on the advertisement copy. A contact responding to the advertisement via telephone can read the code to you when calling in. As another example, for broadcast or print media you can use a telephone extension or fictitious person's name. When a contact responds to an advertisement and asks for the extension or name, you enter that as the promotion code.

3. Select a status. There are three choices:

   Planned: An advertisement that does not have an assigned run date.

   Scheduled: An advertisement that has an assigned run date.

   Unscheduled: An advertisement that was previously scheduled but for some reason did not run.

4. If applicable, enter the agency name who is creating and managing the advertisement for you.

5. Select the media type. See description and / or examples of these fields below:

   Media Type: Examples include newspaper or television.

   Publication Type: Examples include Medical Journal or Children's Television Program.

   Publication Name: The name of the publication (for print advertising) or program (for audio / visual advertising) in which your advertisement will run. If your advertisement is to run in multiple publications, you can either leave this blank or create a separate advertisement record for each. Then assign a unique code to each one. This lets you track the effectiveness of various publications.

6. Use the Description field to convey any additional information about the advertisement.

7. Use the Cost to Publish region to record Expected and Actual publication costs.

   Currency: The monetary unit.

   Expected: The expected cost of the advertisement.

   Actual: The actual cost of the advertisement.

8. Use the Responses region to monitor the Expected and Actual number of responses to the advertisement.

   Expected: The number of expected responses.

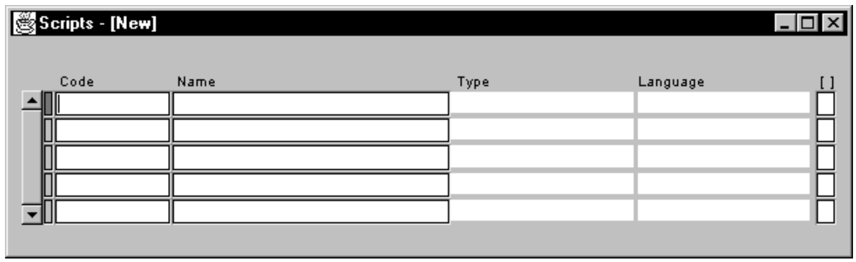
   Actual: The Actual Response field automatically increases by one each time the advertisement code is referenced as a promotion in the Find Account and Contact window.

   Target Reach: The total amount of coverage you expect the advertisement to have. For example, for a magazine or journal, the target reach would equal the publication's circulation.

9. Use the Run Dates region to record the from and to date of the advertisement.
10. Check the Enabled check box to use this advertisement.
11. Choose Save on the toolbar to add the new advertising record to the database.

▶ To link a script to the advertisement:

1. Choose the Scripts button to open the Scripts window.



2. Enter the script code or name.

   The remaining information: Type and Language automatically displays on the selected line once you tab to the next field or line.

   By linking a script to an advertisement, you can ensure a uniform approach to processing advertisement responses.

▶ To update an existing advertisement:

1. From the Navigator, choose Promotions –> Advertisement to open the Advertisements window.
2. Choose Enter from the Query menu.
3. Enter identifying information of the advertisement you want to update.

   You can enter information in any field to locate the advertisement.
4. Choose Run from the Query menu to perform the search.

   If an advertisement is located, it is displayed in the Advertisements window. If not, enter less restrictive search criteria and run the query again.

5. Update any information in the Advertisements window as required.

   Uncheck the Enabled check box if you no longer want to use this advertisement.

6. Choose the Scripts button to open the Scripts window to update the names of the scripts that are linked to this advertisement.

▶ **To monitor advertisement results:**

- Each time a contact responds to an advertisement, use the Promotion Code or Promotion Name field of the Find Account or Contact window to enter the advertisement code or advertisement name, respectively. This increments the Actual Responses field for the advertisement by one, which lets you monitor the effectiveness of the campaign.

  In addition, if you link a script to an advertisement, that script automatically opens when you choose the Scripts button from a Contact window. If you link more than one script, a window opens from which you select the appropriate script.

CHAPTER

11

Creating Scripts

A script is a set of predefined questions and answers used to guide you through a telephone conversation or help you record answers received on promotional response cards or event evaluations. You can set up the script to cause automatically generated actions, such as sending collateral, creating a lead, entering a product interest, or enrolling a contact in an event, depending on the answer to each question.

The following topic is included:

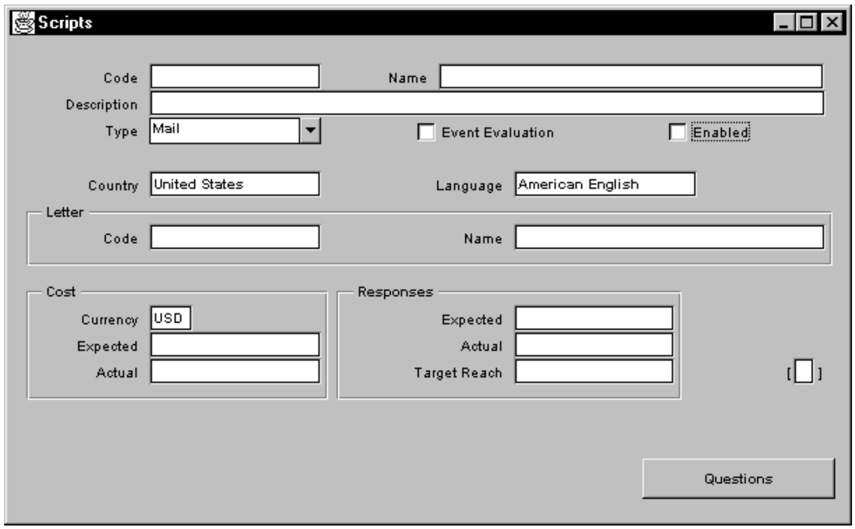
The following tasks are included:

Defining a Call or Mail Script

The Scripts window lets you create or define a new script, enter questions, and relate the script to a promotion.

▶ **To define a script:**

1. From the Navigator, choose Promotions –> Scripts to open the Scripts window.



2. Enter the script identifying information in the Code, Name, Description, and Type fields.

   Code: The unique identifying number for this script, also called a promotion code. Your system administrator determines if the code is user or is system generated.

   Attention: If you are creating a mail script, print the unique script code on the response card, so you can easily identify it when you receive the filled–in card back from a prospect.

   Suggestion: If you operate in a multilingual environment, you can create identical scripts in different languages and assign a different promotion code to each.

   Type: Select *Call* when you want to use the script during telephone conversations with prospects. Select *Mail* when you want to use the script to represent questions on a mail–in response card or event evaluation.

3. To query for all existing scripts, choose Find All from the Query menu.

4. Choose Save on the toolbar to add the script to the database.

▶ **To attach a cover letter to collateral, send in a response to a script answer:**

- Enter the letter code and name in the Letter region.

  Depending on how each question in a script is answered, you can send more than one collateral item to a contact. The Process Script Answers concurrent program bundles all collateral selections into a single collateral request, removing duplicate collateral items, and assigns the cover letter you enter here to the bundled package for processing.

▶ **To track costs and response rates:**

1. Any costs associated with the script can be monitored in the Cost region.

2. If the script is associated with a promotional campaign, use the Responses region to enter data in the responses Expected and Target Reach fields. The Actual (response) field automatically increases by one each time the script is used.

   Expected: The number of responses you expect from your target.

   Actual: The number of responses you received from your target.

   Target Reach: The number of contacts or prospects you expect to reach over the course of the promotion.

Entering Script Questions, Answers, and Actions

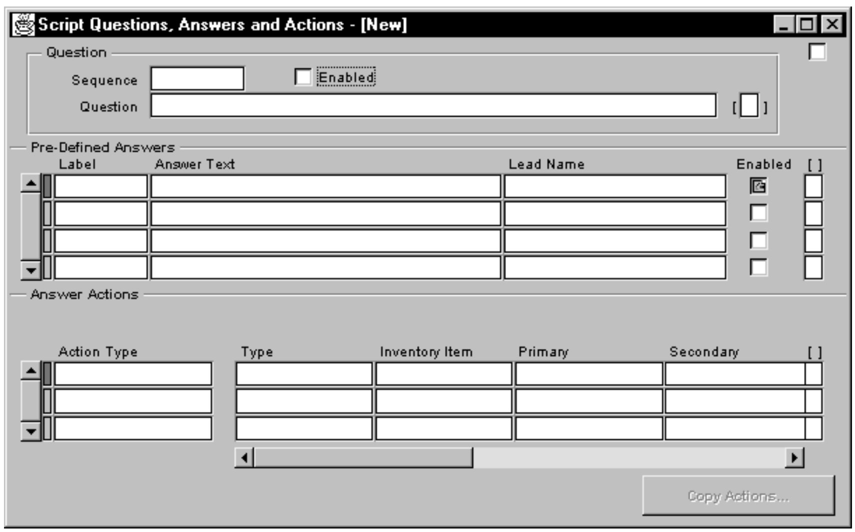
For each defined script, you must enter the question number and text, possible answers for each question, and, for each answer, the action(s) you want performed in the Script Questions, Answers, and Actions window.

Prerequisites

❑ Enter the script's identifying information.

▶ **To enter a script question and its answers:**

1. Choose the Questions button in the Scripts window to open the Script Questions, Answers, and Actions window.



2. Enter the question number and text:

   Sequence: A number identifying the question text. Within an individual script the sequence must be unique for each question.

   Question: The question text to be read during a telephone conversation, or for mail response scripts, the question as printed on the response card.

3. Verify that the Enabled check box is checked.

   If it is not checked, then the question does not appear when you use the script.

4. Enter Pre–defined Answers.

   Each question can have as many predefined answers as you need.

   Label: Identifies each answer across all sequence numbers. For example, if question 1 has three possible responses: A, B, and C; then the labels for question 2 cannot also be A, B, and C.

Suggestion: You may want to use the sequence number as part of the label. For example, label the answers to question 1 as 1A, 1B, and 1C and the answers to question 2 as 2A, 2B, and 2C.

Suggestion: To make it easier to process mail responses, make sure the sequence and label numbers can be easily matched to the questions and possible responses printed on the card.

For example, suppose you had a card that looked like this:

Please respond to the following questions.

My company has:	**My industry has:**
A. 1–50 employees	A. Pharmaceuticals
B. 51–100 employees	B. Medical Supplies
C. 101–200 employees	C. Homeopathic Supplies
D. over 200 employees	D. Non–health Care

Table 11 – 1 Example of a Card (Page 1 of 1)

You represent the card with two script questions each having four answers.

Sequence	Question
1	My company has:
Label	**Answer Text**
1A	1–50 employees
1B	51–100 employees
1C	101–200 employees
1D	Over 200 employees

Table 11 – 2 Example of a Card with Script Question #1 (Page 1 of 1)

Sequence	Question
2	My industry has:
Label	**Answer Text**
2A	Pharmaceuticals
2B	Medical supplies
2C	Homeopathic supplies
2D	Non–health care

Table 11 – 3 Example of a Card with Script Question #2 (Page 1 of 1)

5. Enter the Answer Text.

Suggestion: When processing mail responses, the question does not appear in the Mail Responses window. To help ensure responses are accurately entered, compose the answer text in a way that reflects the question asked. For example, if the question is: *Was the seminar worth your time?* Enter an affirmative answer as *Yes, the seminar was worth my time* and a negative answer as *No, the seminar was not worth my time.*

6. Enter a default lead name, if appropriate.

   This is especially useful if you plan on entering several *Generate Lead* automatic actions for this answer. The lead name will be automatically entered in the Lead Name field of the Answer Actions region saving you the effort of having to enter the same lead name several times. You can override the default lead name in the Answer Actions alternative region, if appropriate.

When the responses to a script are processed, multiple actions that specify the same lead are consolidated so that only one lead is generated.

7. Repeat this task to enter additional questions and answers.

▶ To branch the script:

There may be instances where you wish to have the script question jump ahead to a question out of sequence because the responder indicated a certain response to a question. The *Next Seq* field in the Pre–Defined Answers region defines the question number that the response leads to. For example, you may have Question 1, Pre–defined Answer 2, lead to Question 18 in your script.

- If all your script questions are defined, you may call the list of values from the Next Seq field.

▶ To define automatic actions for an answer:

1. Select an answer in the Pre–Defined Answers region and enter automatic actions for that answer in the Answer Actions region.

   For each answer you can record an action that you want the system to automatically perform based on the responses. Possible actions are:

Action Type	Result
Enroll for Event	Enrolls a contact in the specified event.
Product Interest	Creates an interest for a contact of specified type, primary code, and secondary code.
Create Lead	Creates a lead defined by name, rank, sales stage, item, and interest.
Send Collateral	Creates a collateral request for the specified collateral piece. If a letter is specified in the Scripts window, it is attached as the cover letter.

Table 11 – 4 Action Types (Page 1 of 1)

Depending on the action type you select, you also enter some combination of the following fields:

Action Type	Create Lead	Enroll for Event	Product Interest	Send Collateral
Interest Type	X		X	
Item	X			X
Code	X	X	X	X
Secondary Code	X		X	
Description		X	X	X
Interest Status			X	
Lead Name	X			
Lead Rank	X			
Lead Sales Stage	X			

Table 11 – 5 Field Combinations for Action Types (Page 1 of 1)

Fields not requiring information are disabled after you select an Action Type.

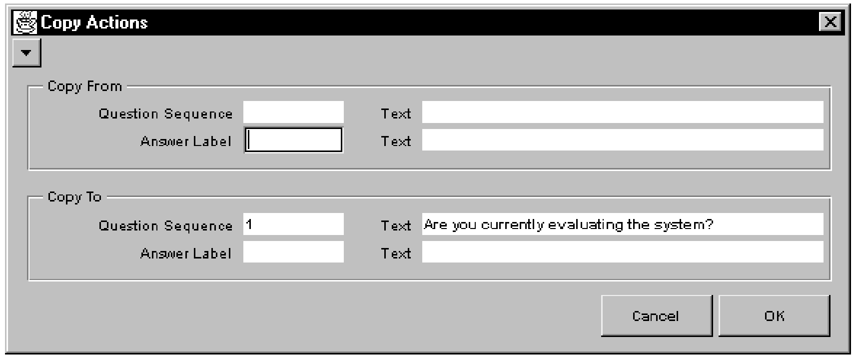
You can enter more than one action per answer, if appropriate.

2. After entering all actions for an answer, select the next answer from the Pre–Defined Answers region and continue with step 1.

Copying Actions

▶ **To copy actions from one answer to another:**

1. Choose the Copy Actions button to open the Copy Actions window.



2. Use the Copy To region to enter the Question Sequence (number) and Answer Label fields to create actions if different from those you selected before navigating to this window.
3. Use the Copy From region to enter the Question Sequence (number) and Answer Label fields you want to copy actions from.

   Actions copied from one answer are added to existing answers in the new region.
4. Choose OK to copy the actions and return to the Script Questions, Answers, and Actions window.

▶ **To enter the next question:**

- Choose New Record button from the toolbar.

▶ **To review all questions:**

- Use the arrow keys to page through questions.

Updating a Script

▶ **To update an existing script:**

1. From the Navigator, choose Promotions –> Script to open the Scripts window.
2. Choose Find All from the Query menu, or choose Query –> Enter; then choose Query –> Run from the Query menu to perform the search.
3. Enter identifying information of the script to update.

   You can enter information in any field to help you locate the script.

   If a script is located, it is displayed in the Scripts window. If not, enter less restrictive search criteria and run the query again.
4. Update any information in the Scripts window, if appropriate.

   Uncheck the Enabled check box if you no longer want to use this script.
5. Choose the Questions button to open the Script Questions, Answers, and Actions window.

   There are no restrictions on what information you can change. You can add, delete, or change answer actions. Any changes you make have no impact on answers already received by a contact or actions already performed on behalf of a contact. Changes affect only future responses and actions.

   ☞ **Attention:** You cannot delete a question or answer. Instead, uncheck the Enabled check box next to a question or answer if you no longer want to use it as part of the script.
6. Choose Save on the toolbar to add the updated script to the database.

Processing Actions to Script Answers

The Process Script Answer Actions concurrent program compiles all script responses from all contacts and performs the actions defined for each recorded answer. Your system administrator can help you set up this program to run automatically on a regular basis.

The program performs some consolidation when performing the actions. Specifically, if several answers on the same card result in the same action, the program performs the action only once.

Using a Script to Prompt You Through a Telephone Conversation

Once a call script is created, select the Script tab to guide you through a telephone conversation and record answers given by a contact.

☞ **Attention:** The person with whom you want to converse must be in the database as a contact before you can use a call script in a telephone conversation with them.

▶ **To use a call script:**

1. Verify that the Script Code and Script Name fields display the name of the script you want to use.

   Select *Inbound* if you are using a script during a call initiated by a contact.

   Select *Outbound* if you are using a script during a call you initiated.

2. Use the Comments field to record any general comments a contact makes that are not related to a specific question or answer.
3. Read the question to the contact.
4. Check the box to the left of the appropriate answer.
5. If a contact has comments related to the answer, enter them in the Comments field.
6. Continue working through the script.

   Choose the up arrow (▲) button to move forward through the script.

   Choose the down arrow (▼) button to move backward through the script.

Entering Responses from Mail–in Response Cards

Once a mail script is created, use the Mail Responses window to guide you through the script and record answers given by a contact. Scripts are usually created by the person at your facility who is responsible for managing marketing promotions.

Before information on a mail–in response card can be entered using the Mail Responses window, the name that appears on the response card must already be a contact in the database.

Since you may be entering many response cards, some recommended procedures for streamlining this process are discussed in this section.

▶ **To process mail–in response cards when the percentage of unentered contacts is high:**

1. Enter the name of the contact for whom you want to process a mail–in response card in the Contact Region of the Find Account or Contact window. See: Finding and Viewing Contact Information: page 3 – 2.

   You can enter any other information, such as an account name to help you narrow down your search.

2. Choose Fuzzy Find.

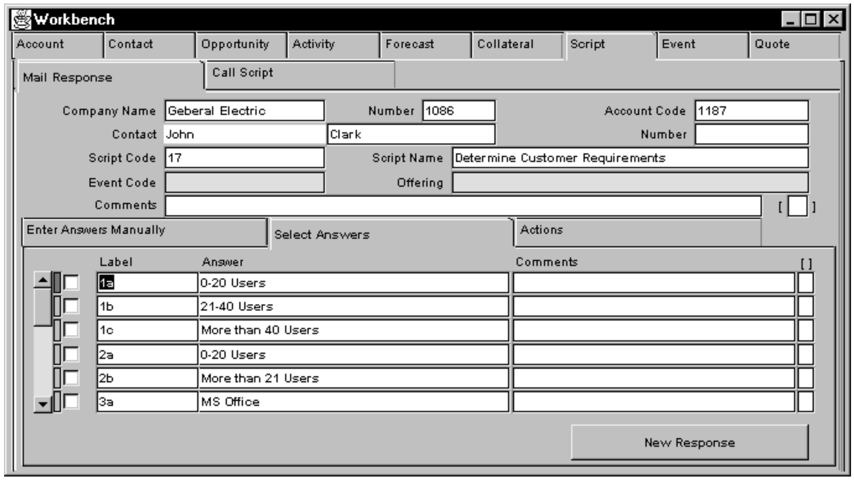
   If a contact is found, the Contacts window opens. Write the contact number on the response card. If you specified an account in the search, the Account Contact window opens.

   > **Note:** The Contacts window is a folder form. If the contact number is not visible, choose Show Field from the Folder menu to display the Contact Number field.

   If the name on the response card is not in the database, enter it as a new contact and write the contact number on the response card. See: Entering a New Contact: page 3 – 4.

3. Once you have written the contact number on each mail–in response card, sort the cards by script number.

4. Choose Mail Responses from the Navigator to open the Mail Responses Window.



5. Enter the script code in the Code field.
6. Enter the contact number in the Number field.
7. Enter the script responses.
8. Continue entering script responses for each contact. Once all contact responses have been entered for one script, enter the next script number in the Script Code field and continue with step 6.

▶ **To process mail–in response cards when the percentage of unentered contacts is low:**

1. Sort the cards by script number.
2. Choose Mail Responses from the Navigator to open the Mail Responses Window.
3. Enter the script code in the Code field.
4. Enter the contact name in the Contact Name field.

   If the contact is not found, put the card aside and go on to the next card.
5. Enter the script responses.
6. Continue entering script responses for each contact. Once all contact responses have been entered for one script, enter the next script number in the Script Code field and continue with step 4.
7. Once all cards have been processed for existing contacts, navigate to the Find Account or Contact window.

8. Enter a contact name that was not found in the database in the Contact region and choose Fuzzy Find.

   Fuzzy Find searches the database for names that resemble the contact name. For example, if a contact's name is Rob Leakey, Fuzzy Find searches for Robert, Bob, and Bobbie Leakey.

   If a match is found, the Contacts window opens. Verify the correct contact is listed and write the contact number on the response card. See: Finding and Viewing Contact Information: page 3 – 2.

   If a match is not found, you can enter a new contact. Write the contact number on the response card. See: Entering a New Contact: page 3 – 4.

9. Once all new contacts are entered, process these response cards as described in this section.

   Use the contact number to locate a contact. This method is the most efficient way of searching the database.

▶ **To use a mail script:**

1. Verify that the Script Code and Script Name fields display the name of the script you want to use and that the account and contact fields match those on the response card you want to process.

2. Use the Comments field to record any general comments a contact might write on a response card.

3. Enter the answers recorded on the response card.

   There are two ways to record answers:

   - Use the Enter Answers Manually region to manually enter the label for each response.
   - Use the Select Answers region if you want to display all possible answers for a script. Then, record the responses by selecting the box to the left of the appropriately labeled field.

4. If a contact has comments related to the answer, enter them in the Comments field.

5. Choose the New Responses button to save the responses and clear the identifying information for the current contact.

   If you have additional response cards to process, use the list of values to select another contact name, or if the contact number is written on the response card, enter it in the Number field.

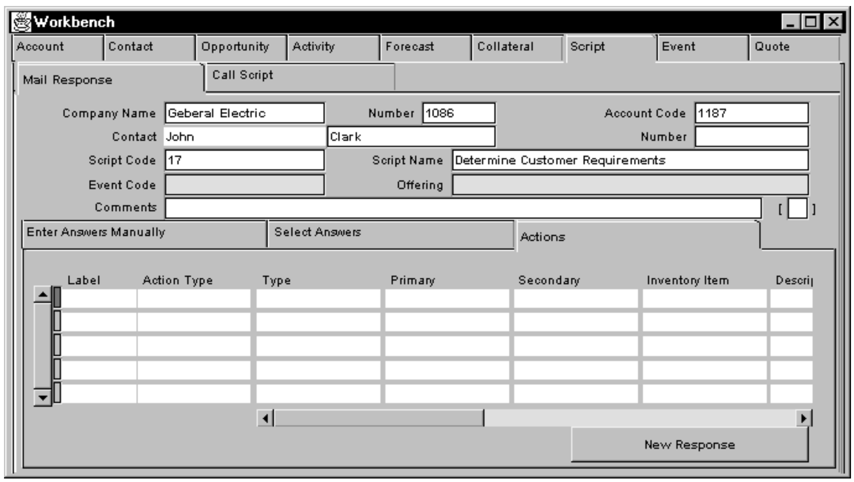
Reviewing Automatic Actions for a Processed Script

After a call or mail script is processed, you can review the actions that will be automatically generated based on selected answers. Possible automatic actions are:

- Send collateral
- Create a lead
- Create a product interest
- Enroll a contact in an event

▶ **To review actions associated with answers to each question:**

1. From either the Mail Responses or Use a Call Script window, choose the Actions button to open the Answer Actions window.



An action type is listed next to each answer. If the action type is:

Send Collateral: The Description field displays the selected collateral item name.

Enroll for Event: The Description field displays the event name.

Product Interest: The Interest Type field displays the product interest that will be entered for the contact.

Create Lead: The Lead region displays the Lead Name, Rank, and Sales Stage fields.

2. Choose OK to return to the Use a Call Script window.

Sending Collateral to a Contact after Processing a Script

After processing a scripted response and reviewing the resulting automatic actions, you can choose to send additional collateral items to a contact.

▶ **To send additional collateral items to a contact:**

- From the Workbench, select the Collateral tab to open the Send Collateral Package window.

  If the script created an action to send collateral, any additional collateral you select will be sent as a separate collateral package.

Linking Scripts to Promotions

You can link a script to other promotions. For example, if you want a sales representative to use a particular script when a contact responds to an advertisement, you can link the script to that advertisement.

Linking several different scripts to the same promotion gives you the flexibility to provide scripted responses for different situations, such as inbound or outbound call responses, while tying all responses to a single promotion.

▶ **To link a script to a promotion**:

1. Select the desired item line.
2. Choose the Script button.
3. Select the code, name, type of script (*Call* or *Mail*).
4. Choose Save from the toolbar.

CHAPTER

12

Promotional Programs

This chapter describes how to track promotional programs.

The following topic is included:

- Overview of Promotional Programs: page 12 – 2

The following tasks are included:

- Tracking Promotional Programs : page 12 – 2
- Copying Promotions: page 12 – 5

Overview of Promotional Programs

A program is a series of marketing promotions that make up a larger marketing effort designed to create company, product, or service awareness and to generate leads in the form of prospect responses.

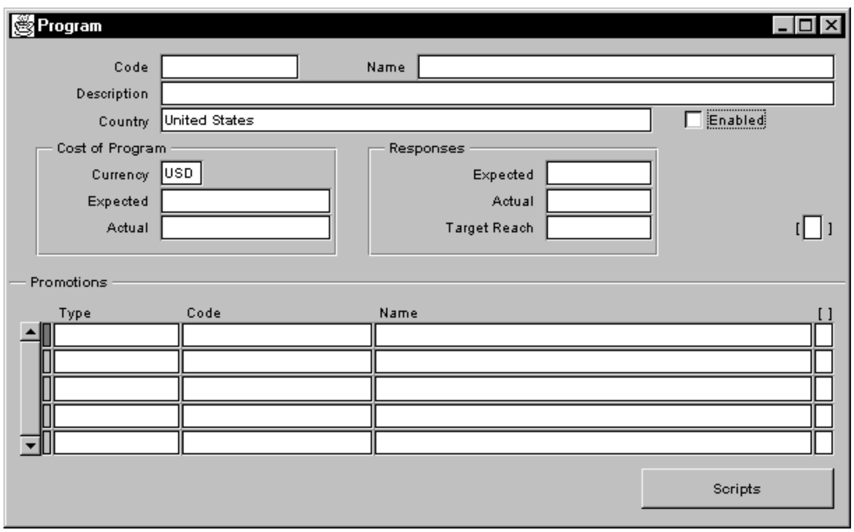
A program can consist of advertisements, collateral, events, mail blitzes, and scripts each of which is first created as stand alone promotions and then bundled into a program. You can tie several promotional campaigns together into a promotional program.

Tracking Promotional Programs

You can organize and track the effectiveness of your program.

▶ **To define a program:**

1. From the Navigator, choose Promotions –> Program to open the Program window.



2. Enter the code and name.

   Your system administrator determines if the code is system generated or entered by you.

Attention: If you plan on tracking program responses, you'll need a method for identifying each program to which a contact responds. For example, if the program includes print advertisements, include the program code on the advertisement copy. A contact responding to the advertisement via telephone can read the code to you when calling in or, for mail–in responses, you will then have the code preprinted on the card. You enter the code in the Promotion Code field of the Find Account or Contact window.

3. Record expected and actual costs in the Cost of Program region.

4. Monitor the expected and actual number of responses to the program in the Responses region.

   The Actual (response) field automatically increases by one, each time the program code is referenced as a promotion in the Find Account or Contact window.

   Target Reach is the total amount of coverage you expect the program to have. Depending on the promotion medium used, this coverage may be measured by number of businesses, households, people, or some other unit.

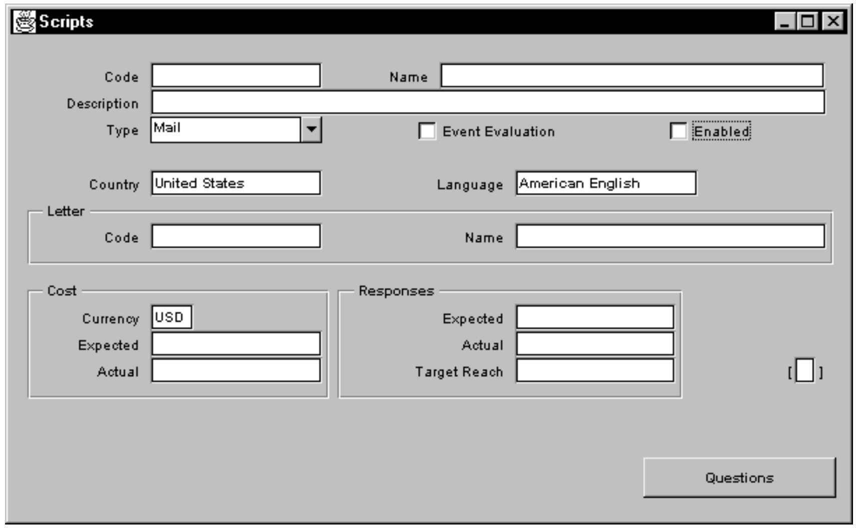
5. Enter the promotions associated with the program in the Promotions region.

   You can enter more than one of any promotion type. For example, you may want to enter several collateral pieces or several advertisements.

Suggestion: Standard promotion types include advertisements, mail blitz, and collateral. Since the source of many leads is either unknown or by word–of–mouth, you might create two programs to monitor how many leads are generated by these non–standard methods. One program could be called *unknown* and the other *word–of–mouth*. When entering a lead that does not match any other program, a salesperson can enter the code for one of these programs in the Find Account or Contact window.

▶ To link a script to the program:

1. From the Navigator, choose Promotions –> Script to open the Scripts window.



2. Select the Scripts tab to open the Scripts window.
3. Enter the script code or script name.

   The remaining information: Type and language automatically displays on the selected line once you tab to the next field.

   By linking a script to a program you can ensure a uniform approach to processing program responses.

▶ To update an existing program:

1. From the Navigator, choose Promotions –> Program to open the Program window.
2. Choose Enter from the Query menu.
3. Enter identifying information of the program you want to update.

   You can enter information in any field to help you locate the program.

4. Choose Run from the Query menu to perform the search.

   If a program is located, it is displayed in the Program window. If not, try entering less restrictive search criteria and run the query again.

5. Enter updated information in the Program window, as appropriate.

   Uncheck the Enabled check box if you no longer want to use this program.

6. Choose the Scripts button if you want to change the list of scripts that are linked to this program.

7. Choose Save on the toolbar to add the updated program to the database.

▶ **To monitor program results:**

- Each time a contact responds to a program, use the Promotion Code or Promotion Name field of the Find Account or Contact window to enter the program code or program name, respectively. This increments the Actual (responses) field for the program by one, letting you monitor the effectiveness of the campaign.

  In addition, if you link a script to a program, that script automatically opens when you choose the Scripts button from a Contact window. If you link more than one script, a window opens from which you select the appropriate script.

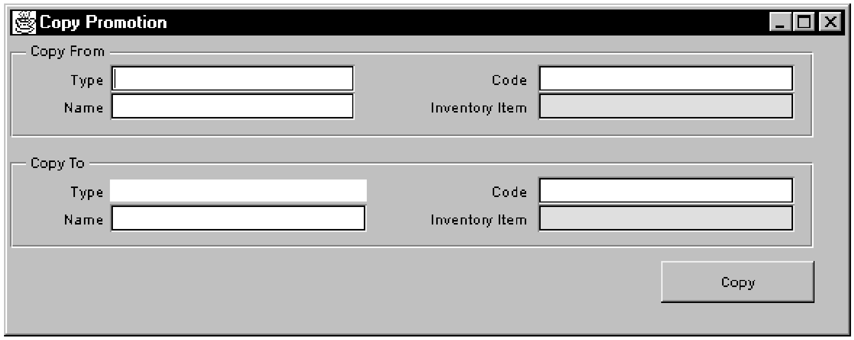
Copying Promotions

The Copy Promotions window lets you copy an existing promotion type and rename it to create a similar one. This is particularly useful when you want to use major elements of an existing script or program in a new campaign. The Copy Promotion window is available from the Navigator.

Promotion types you can copy are: advertisements, mail blitz, collateral, events, letters, programs or scripts.

▶ **To copy a promotion:**

1. From the Navigator, choose Promotions –> Copy Promotions to open the Copy Promotion window.



2. Enter the name or code of the promotion you wish to copy, in the Copy From region.

   If you do not know the name of the promotion, you can search for available documents from the list of values in either the Type field or the Code field. When you select a promotion type, the list of available documents of that type becomes available from the list of values in the Code field.

   The promotion type appears in the Copy To region.

3. Enter a name for the new program in the Name field.

4. Choose the Copy button.

   A new code number is automatically assigned to the new program.

CHAPTER

13

Managing Territories

Once you have your sales territories set up, Oracle Sales and Marketing routes lead, account and contact information to the sales representative for that territory. You will find that this is a very helpful feature of Oracle Sales and Marketing.

The following topic is included:

The following tasks are included:

Maintaining Your Sales Organization

This section describes how to add people to your sales force. Each person must be added to a sales force to be assigned to a sales team or group. Your sales organization, including your sales force, sales groups and sales partners, are entered and organized at implementation time and is a prerequisite to defining territories.

You must add employees to a sales group *first* because by defining your sales groups first, each employee you add is added to the sales force as well, relieving you of the task of adding employees to both rosters.

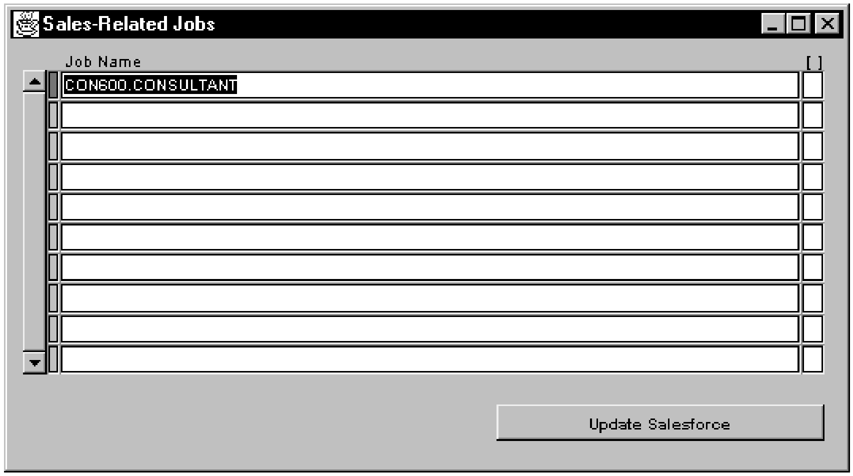
The Sales Organization menu item is contained in both the Sales and Marketing Super User and Territory Administrator default menus. If you are at the point of initially entering your sales force, see the *Oracle Sales and Marketing Implementation Guide* for specific implementation steps.

Defining Sales–Related Jobs to Add New Employees

The Sales–Related Jobs window lets you move employees from the HR database to your sales organization based on their job title. From the Sales–Related Jobs window, you need to select all job titles relevant to your organization from the list of values. When you choose Update Salesforce, the HR database is scanned for all employees with that job title. All employees with matching job titles are loaded into the sales force.

▶ **To define Sales–Related jobs:**

1. Logged in as the Superuser, navigate to Setup –> Sales Organization –> Territories –> Sales–Related Jobs.



2. Select from the list of values to enter, your sales and marketing job titles, one on each line.
3. Choose Update Salesforce.

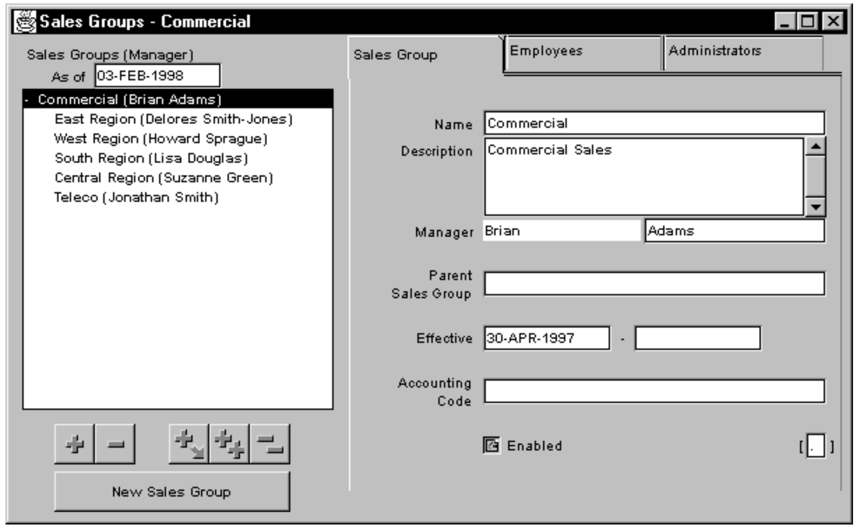
Adding a New Employee to a Sales Group

When you add a new employee to a sales group, the system checks to see if that person is already in your sales force. If the system does not find the name, it automatically adds the name to your sales force.

▶ **To add a new employee to a sales group:**

1. Log in as Territory Administrator or Sales and Marketing Super User.
2. From the Navigator, choose Sales Organization.

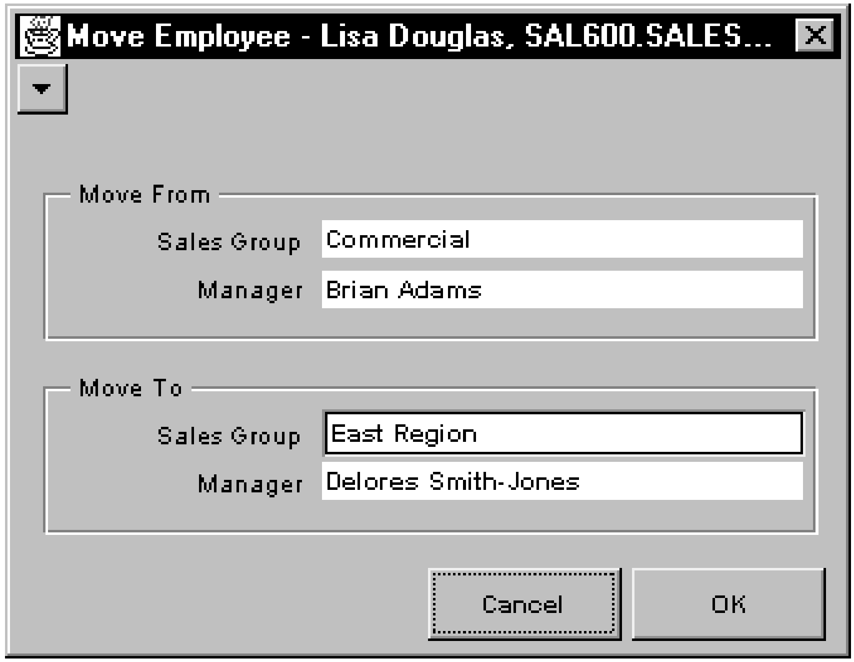
   In the Territory Administrator menu, Sales Organization is on the first level. In the Sales and Marketing Super User menu, Sales Organization is a submenu under Setup.



3. Choose Sales Groups.
4. Choose the management level within which the new employee reports *or* if a new manager, choose the parent sales group.
5. Choose the New Sales Group button.
6. Enter the new employee's name, description of their duties, and manager.
7. Enter the parent sales group or select from the list of values.
8. Enter a start date for the employee.
9. Enter the accounting information.
10. Choose Save on the toolbar to add the new sales force employee to the database.

▶ **To move an employee to another group, choose the Move button:**

1. Choose the Move button.



2. Designate where to move the employee.

▶ **To designate an administrator for a sales group:**

The sales group administrator has full write access to revise:

- Opportunity information for those employees within the sales group, equivalent to Team Leader access.
- Forecasting information for those employees within the sales group, equivalent to Team Leader access.
- Account information for those employees accounts within the sales group.

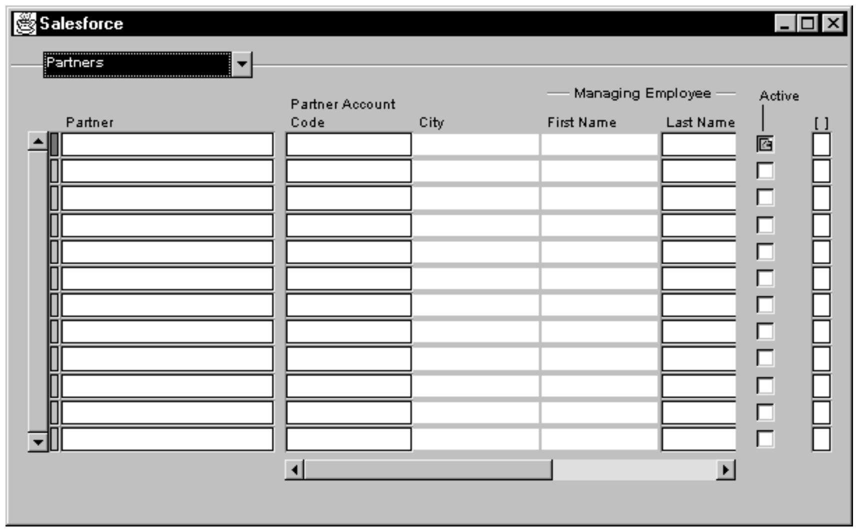
■ Enter the name of the sales group administrator in the Administrator window by choosing from the list of values.

Adding a Sales Partner to Your Sales Organization

You might have a number of active sales partners who work with managing employees within your organization. By entering sales partner information in the Salesforce window, sales partners can automatically be notified of sales leads and opportunities.

▶ **To add or edit sales partner information:**

1. From the Navigator, choose Setup –> Sales –> Sales Force to open the Salesforce window.
2. Select the Partners tab.



3. Select the first blank line in the Partner field.
4. Choose Find All from the Query menu.

   All your current partners should display.
5. Choose New Record from the Edit menu.
6. Enter the new partner information.

   If there is a list of values for you to select from, the list of values button on the toolbar will be active.
7. Enter the name of the managing employee in the appropriate fields.

   Use the scroll bar to fill in fields.
8. Enter the name of the sales partner in the Primary Contact field.

9. Choose Save on the toolbar to add the information to the database.

▶ **To deactivate a sales partner:**

- If a sales partner is no longer active, you may deactivate the partnership status by unchecking the Active check box. Do not delete the record.

Managing Territories

This section contains information on managing and updating territories for your sales organization. You can define a territory using a combination of criteria, assign a territory to an individual or a business partner, and organize territories into functional groups.

For information, discussion and examples of setting up territory groups and types, see the Territory Administrator section of the *Oracle Sales and Marketing Implementation Guide.*

Controlling Territory Access

Access to accounts, contacts, and leads within Oracle Sales and Marketing is granted at two levels.

First Level

First, the system administrator assigns an *Access Privilege* profile option to each user. There are three possible values:

- *Full Access* lets you update and view information about any account, contact, or lead in Oracle Sales and Marketing, without having any territory assigned to you and without limitation.
- *Territory Access* lets you update and view information about accounts, contacts, and leads in your territory only. It is *limited* access.
- *Prospecting* lets you view all information about any account, contact, or lead. You may not update any information, unless you are a member of the sales team for that account. You can, under this access privilege, enter new opportunity information. To have update privileges to account information, existing opportunities, and contact information, you must be added to the sales team for that account.

For example, direct response telemarketing representatives may need *Full Access* since they receive calls from many different contacts without regard to territory. Account representatives receive *Territory Access* since they do not have a need to view account, contact, or lead information that is not within their territories. You can alternatively assign *Prospecting Access* to telemarketing representatives who may be calling prospective leads, but should not have write access to account and contact information.

Second Level

The second level of access is set at the territory group level. Each territory group you create must have an *Access Type* assigned to it. The access type only applies to those users whose access privilege is *Territory Access* and describes the version of territory access they have as *limited* access. There are three possible values for a territory access type:

- *Account Access* gives the employee access to an account and to all contacts associated with the account, but *not* to any associated leads.
- *Lead Access* gives the employee access to a specific lead, the account the lead belongs to, and the contacts associated with the account but *not* to other leads from the same account.
- *Account and Lead Access* gives the employee access to an account, and to all contacts and leads associated with the account. This is the most powerful territory access type.

Since access is assigned at the group level, all the territory type attributes that you assign to the territory group inherit the access of the group. Because a sales representative can have many territories and each territory can be in a different group having a different access type, a sales representative can end up with different accesses to different accounts.

☞ **Attention:** You cannot change the access for the territory group once it is set. In the event you need to change the access privilege of a particular group, you must create a new territory group with the appropriate access privilege and deactivate the existing one.

To illustrate how a sales representative can have different accesses from different territories, suppose the territories are assigned as follows:

Territory Group	Access	Territory Type	Territory	Sales Rep
Account Reps	Account and Leads	Large Regional Accounts	Jerzy Tools, Bortag Industries, in California, Oregon, Washington	Mckenna
Account Reps	Account and Leads	Geographical Regions	California, Oregon, Washington	Rose
Product Reps	Lead	Regional Lead Expected Purchase	Lab Equipment, in California, Oregon, Washington	Thomas
Product Reps	Lead	Lead Expected Purchase	Lab Benches	Mckenna

Table 13 – 1 Territory Assignment Example (Page 1 of 1)

Notice that Mckenna, in the Sales Rep column, is assigned to two different territories in two different groups. Mckenna gets access to all account, contact, and lead information for *Jerzy Tools* and *Bortag Industries* in *California, Oregon*, and *Washington*. In addition, Mckenna gets access to all leads with a lead item value of *Lab Benches* regardless of what account or state the lead is in.

This discussion is intended to clarify the access distinction between individuals in your sales force and hopefully to point to a situation that can occur. Your Telemarketing Representatives, and other individuals with *Full Access*, may be able to see account changes and lead changes that a Field Representative with *Territory–Account and Lead Access* cannot see due to his or her access privilege.

Access Type Qualifier Rules

Even though you assign the territory access at the group level, Oracle Sales and Marketing has rules for qualifiers you assign to a territory type. These rules exist to simplify which access type to specify when creating the territory group.

Qualifier Rules for Territory Types

The following table shows the list of qualifiers with their recommended access types.

Qualifier Name	Suggested Access Type for the Territory Group
Account Classification	Account and Leads
Account Code	Account and Leads
Area Code	Account and Leads
City	Account and Leads
Contact Interest	Account
Country	Account and Leads
County	Account and Leads
Customer Name	Account and Leads
Customer Name Range	Account and Leads
Lead Channel	Lead
Lead Classification	Lead
Lead Expected Purchase	Lead
Lead Item Number	Lead
Lead Total Amount Range	Lead
Postal Code Range	Account and Leads
Sales Partner	Account and Leads
State	Account and Leads
Territory Name	None

Table 13 – 2 Recommended Access Types for Qualifiers (Page 1 of 1)

If the territory group has:

- *Account* access, then you *cannot* select a qualifier with a suggested access of *Lead.*
- *Lead* access, then you can select any qualifier, but at least one of them *must have* a suggested access of *Lead*.
- *Account and Leads* access, then you *cannot* select a qualifier with a suggested access type of *Lead*.

Using the Assign Territory Access Concurrent Program

Oracle Sales and Marketing automatically creates access records based on the territories defined for your enterprise when you run the Assign Territory Access program. Oracle Sales and Marketing keeps a list of new or changed accounts, leads, and territories. The Assign Territory Access program reads the list to determine which accounts and leads to analyze.

Suggestion: Since account and lead information changes frequently, you should run the Assign Territory Access program once a day, preferably during off hours.

Territory Access Example

The following example shows the access records that automatically result given the specific territory definitions, accounts, and leads shown below.

Examine the way the territory types have been organized into groups and the way territories have been defined under territory types. Notice how the access defined in the territory group affects the access the sales representatives ultimately have to a particular account or lead. Also notice the role rank plays in determining territory assignment.

Territory Group Name	Assigned Access Type
AR — Account Representatives	Account and Leads
PR — Product Representatives	Lead
CR — Contact Representatives	Account

Table 13 – 3 Territory Groups (Page 1 of 1)

Territory Group	Territory Type	Qualifier	Rank	Resulting Access Type
AR	Key Account	Account Code	Very High	Account and Leads
AR	Key Customer	Customer Name	High	Account and Leads
AR	Industry by State	Account Classification State	Moderate	Account and Leads
AR	State	State	Low	Account and Leads
PR	Lead Expected Purchase in Key State	Lead Expected Purchase State	Very High	Lead
PR	Lead Item Number in Key State	Lead Item Number State	Very High	Lead
PR	Lead Expected Purchase	Lead Expected Purchase	High	Lead
PR	Lead Item Number	Lead Item Number	High	Lead
CR	Contact Interest	Account or Contact Interest	Very High	Account

Table 13 – 4 Territory Types (Page 1 of 1)

Territory Group	Territory Type	Rank	Qualifier	Qualifier Values that Define the Territory	Assigned Sales Rep
AR	Key Account	Very High	Account Code	100 (Xyron in Tracy, CA) or 200 (Xyron in Fresno, CA)	Anderson
AR	Key Account	Very High	Account Code	300 (Xyron in Phoenix, AZ)	Bradley
AR	Key Customer	High	Customer Name	Xyron	Cummings
AR	Key Customer	High	Customer Name	Antel	Dunn
AR	Industry by State	Moderate	Account Classification	Pharmaceuticals	Elkins
			State	CA	
AR	Industry by State	Moderate	Account Classification	Pharmaceuticals	Farmer
			State	AZ	
AR	State	Low	State	CA	Goldman
AR	State	Low	State	AZ	Henderson
PR	Lead Expected Purchase in Key State	Very High	Lead Expected Purchase	Lab Equipment	Ingalls
			State	CA	
PR	Lead Item Number in Key State	Very High	Lead Item Number	12–933 (Ammonium Sulfate)	Jackson
			State	CA	
PR	Lead Expected Purchase	High	Lead Expected Purchase	Lab Equipment	Kendall
PR	Lead Expected Purchase	High	Lead Expected Purchase	Chemicals	Lawson
PR	Lead Item Number	High	Lead Item Number	12–497 (Serum Centrifuge)	Monroe
PR	Lead Item Number	High	Lead Item Number	12–933 (Ammonium Sulfate)	Niles

Table 13 – 5 Territories (Page 1 of 2)

Territory Group	Territory Type	Rank	Qualifier	Qualifier Values that Define the Territory	Assigned Sales Rep
CR	Contact Interest	Very High	Account or Contact Interest	Lab Equipment	Oliver
CR	Contact Interest	Very High	Account or Contact Interest	Chemicals	Parker

Table 13 – 5 Territories (Page 2 of 2)

Customer Name	Description of Customer
Xyron	Pharmaceutical company
Antel	Pharmaceutical company
Brighton	Pharmaceutical company
Biology Dept., Univ. of California	University

Table 13 – 6 Customers (Page 1 of 1)

The following table shows accounts, contacts, and contact interests. The far right column shows the name of the sales representative that gets access to the account, based on the territory rules shown in the tables above. Notice that the sales representatives Ingalls, Jackson, Kendall, Lawson, and Niles get access to the account because they are each the assigned sales representative for a lead associated with the account. (See: the Leads table: page 13 – 18.) Because they have Lead access, they can also see the account the lead belongs to and all contacts associated with the account. Refer to the Resulting Accesses table: page 13 – 19, to see how the access permission is granted.

Acct Code	Description of Account	Contact	Contact's Interest	Sales Reps That Receive Access to Account & Contact
100	Xyron in Tracy, CA	Smith	Lab Equipment	Anderson
				Ingalls
				Oliver
200	Xyron in Fresno, CA	Taylor	Lab Equipment	Anderson
				Jackson
				Oliver
300	Xyron in Phoenix, AZ	Ulman	Lab Equipment	Bradley
				Kendall
				Oliver
400	Antel in Oakland, CA	Vale	Chemicals	Dunn
				Parker
500	Brighton in Tucson, AZ	Wilson	Chemicals	Farmer
				Parker
				Lawson
				Niles
600	Biology Dept., Univ. of CA			Goldman

Table 13 – 7 Accounts and Contacts (Page 1 of 1)

The following table shows leads, lead classifications, and lead item numbers. The far right column shows the name of the sales representative that gets access to the lead, based on the territory rules shown in the tables above. Notice that the sales representatives Anderson, Bradley, Farmer, and Goldman, who as account representatives have Account and Lead access, get access to all leads for the account. Refer to the Resulting Accesses table: page 13 – 19 to see how the access permission is granted.

Lead Number	Account	Expected Purchase on Lead Line	Lead Item Number on Lead Line	Sales Reps. That Receive Access to Lead
1000	100—Xyron in Tracy, CA	Lab Equipment		Anderson Ingalls
2000	200—Xyron in Fresno, CA		12–933	Anderson Jackson
3000	300—Xyron in Phoenix, AZ	Lab Equipment		Bradley Kendall
4000	500—Brighton in Tucson, AZ	Chemicals	12–933	Farmer Lawson Niles
5000	600—Biology Dept., Univ. of CA	Filters		Goldman

Table 13 – 8 Leads (Page 1 of 1)

The following table shows the accesses that Oracle Sales and Marketing creates by applying the territory rules to the account and lead information.

Sales Rep.	Access Type	Account	Leads
Anderson	Account and Leads	100—Xyron in Tracy, CA	All
Anderson	Account and Leads	200—Xyron in Fresno, CA	All
Bradley	Account and Leads	300—Xyron in Phoenix, AZ	All
Dunn	Account and Leads	400—Antel in Oakland, CA	All
Farmer	Account and Leads	500—Brighton in Tucson, AZ	All
Goldman	Account and Leads	600—Biology Dept., Univ. of CA	All
Ingalls	Lead	100—Xyron in Tracy, CA	1000
Jackson	Lead	200—Xyron in Fresno, CA	2000
Kendall	Lead	300—Xyron in Phoenix, AZ	3000
Lawson	Lead	500—Brighton in Tucson, AZ	4000
Niles	Lead	500—Brighton in Tucson, AZ	4000
Oliver	Account	100—Xyron in Tracy, CA	None
Oliver	Account	200—Xyron in Fresno, CA	None
Oliver	Account	300—Xyron in Phoenix, AZ	None
Parker	Account	400—Antel in Oakland, CA	None
Parker	Account	500—Brighton in Tucson, AZ	None

Table 13 – 9 Resulting Accesses (Page 1 of 1)

Additional Information

Rank is instrumental in determining who gets access. Within a territory group, the matching territories having the highest rank are the only ones that gain access. For example, Anderson is the only sales representative from the Account Representatives territory group that gets access to Xyron in Tracy. Because the Key Account territory is ranked Very High, he beats out Cummings, Elkins, and Goldman. Dunn gets access to Antel because there is no Key Account representative for Antel in Oakland. Farmer gets access to Brighton because Farmer is the representative for pharmaceutical companies in

Arizona and there are no Key Account or Key Customer representatives for Brighton.

Notice also that if there are several territories that all have the highest rank, they all get access. Lawson and Niles both get access to lead 4000 because Lawson handles all chemical sales and Niles handles any non–California Ammonium Sulfate sales. Since Lawson and Niles both have territories with rank High, they both get access.

You can automatically create the most appropriate sales team for each lead, based on account and product information. For example, Anderson and Ingalls are the sales team for Xyron in Tracy, CA because Anderson is the Key Account representative for Xyron in Tracy, and Ingalls gets involved with all lab equipment sales in California (lead number 1000 in the Leads table). Whereas the team for Xyron in Fresno, CA is Anderson and Jackson because Anderson is also the Key Account representative for Xyron in Fresno, and Jackson handles all Ammonium Sulfate sales in California (lead number 2000 in the Leads table). By putting the territories that are based on account information in a different territory group from the territories that are based on lead information, you can build effective sales teams.

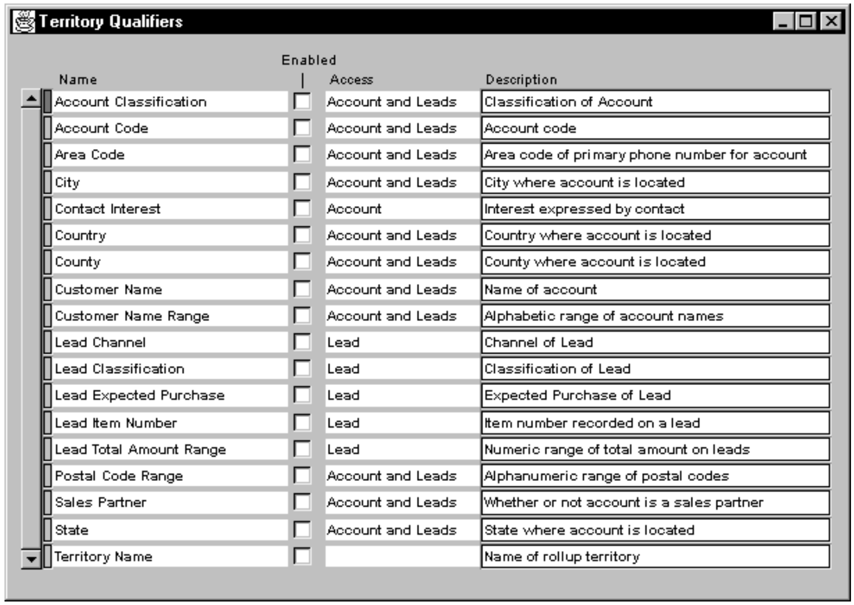
You can grant account–only access to a product marketing representative, if you want to let the marketing representative create lists of contacts for mailings or call campaigns based on the interests of the contact. By putting this type of territory in a different group than the other territories, your product marketing representatives do not compete for access with your sales representatives. For example, since Oliver has account–only access based on contact interest, he can create a list of all contacts interested in lab equipment.

Selecting Territory Qualifiers

Once you have decided which qualifiers to use for your territory definitions, use the Territory Qualifiers window to enable those qualifiers.

▶ To select territory qualifiers

1. From the Navigator, choose Setup –> Sales Organization –> Territories –> Qualifiers to open the Territory Qualifiers window.


Territory Qualifiers

Name	Enabled	Access	Description
Account Classification		Account and Leads	Classification of Account
Account Code		Account and Leads	Account code
Area Code		Account and Leads	Area code of primary phone number for account
City		Account and Leads	City where account is located
Contact Interest		Account	Interest expressed by contact
Country		Account and Leads	Country where account is located
County		Account and Leads	County where account is located
Customer Name		Account and Leads	Name of account
Customer Name Range		Account and Leads	Alphabetic range of account names
Lead Channel		Lead	Channel of Lead
Lead Classification		Lead	Classification of Lead
Lead Expected Purchase		Lead	Expected Purchase of Lead
Lead Item Number		Lead	Item number recorded on a lead
Lead Total Amount Range		Lead	Numeric range of total amount on leads
Postal Code Range		Account and Leads	Alphanumeric range of postal codes
Sales Partner		Account and Leads	Whether or not account is a sales partner
State		Account and Leads	State where account is located
Territory Name			Name of rollup territory

2. Enable the qualifiers you want to use by checking the Enabled check box.

   Only those qualifiers that are enabled can be used to define a territory.

Suggestion: You can increase the speed of the Assign Territory Access Concurrent program by enabling only those qualifiers that you intend to use.

Entering Territory Groups

The Territory Groups window lets you enter, update, or view territory groups.

Prerequisites

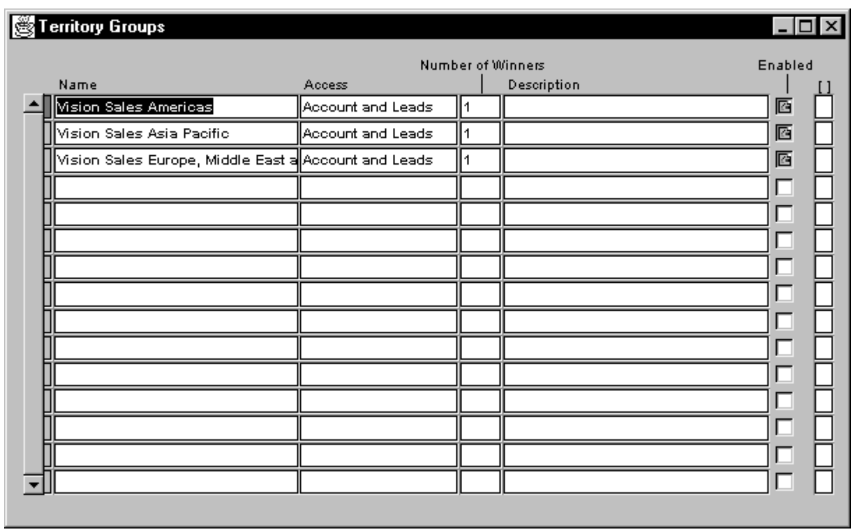
❑ Know the type of access you want to assign to the group (*Account, Lead,* or *Account and Lead*).

❑ Have a good idea about the territory types you plan on assigning to each group.

▶ **To enter territory groups:**

1. From the Navigator, choose Setup –> Sales Organization –> Territories –> Groups to open the Territory Groups window.

   Depending upon your user responsibility, setting the territory selections may be listed under the Setup / Organization option in the Navigator.



2. Enter the group name and access type in the Name and Access fields, respectively.

   Each territory group must have an access assigned to it.

   See: Controlling Territory Access: page 13 – 9.

3. Enter a number in the Number of Winners field or accept the default value of 1.

   The Number of Winners field specifies the total number of territories a lead or account can be assigned to within a territory group.

   For example, if you set this value to four, Oracle Sales and Marketing randomly selects four territories from the set of highest ranked qualifying territories when assigning an account or lead. If you want all highest ranked qualifying territories to gain access, set this number to 9999. If you do not specify a number, this field defaults to a value of 1, and one territory is randomly selected from the set of highest ranked qualifying territories.

4. Check or uncheck the Enabled check box to disable or re–enable a territory group, respectively.

5. Choose Save on the toolbar to add the territory group to the database.

Entering Territory Types

The Territory Types window lets you define the territory types for a previously defined territory group.

Prerequisites

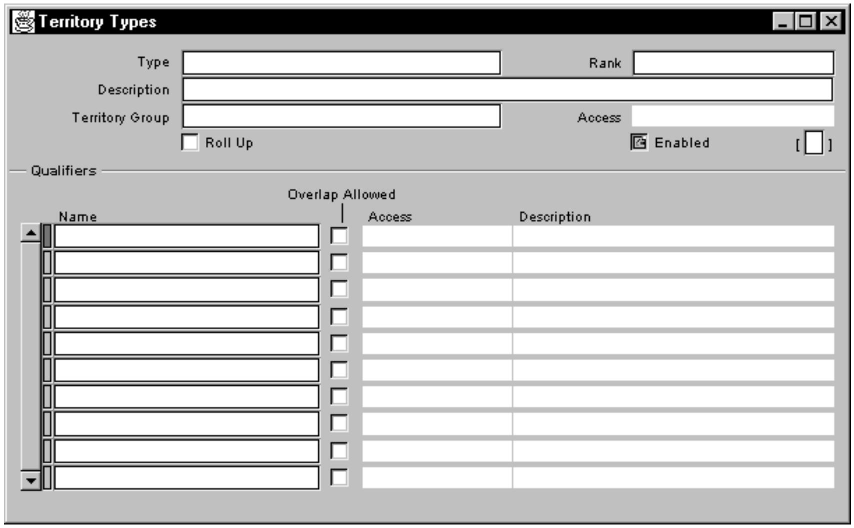
❑ Territory Groups must be entered

❑ Appropriate Territory Qualifiers must be entered.

▶ **To enter territory types:**

1. From the Navigator, choose Setup –> Sales Organization –> Territories –> Type to open the Territory Types window.

   Depending upon your user responsibility, setting the territory selections may be listed under the Setup / Organization option in the Navigator,



2. Check Roll Up and Enabled check boxes, if appropriate.

   Check the Roll Up check box if you are defining a territory that you use as a qualifier to define other territories.

   To ensure that you do not use a territory type, you can disable it by unchecking the Enabled check box. You cannot define a territory using a disabled territory type.

3. Enter the territory type and rank.

   Type: (User definable). The name denoting the territory type.

   Rank: Establishes an order of preference for a territory type compared to other territory types in the group. There are five predefined ranks: *Very high, High, Moderate, Low,* and *Very Low.*

4. Select the qualifier(s) you want to use to define this territory type, using the list of values.

   Make sure the qualifiers you use are enabled. When you enter the territory qualifier, Oracle Sales and Marketing fills in the suggested access (*Account, Lead,* or *Account and Lead*) in the Access field and the qualifier description in the description field.

   If you are using a roll up territory as one of your qualifiers, enter *Territory Name* in the Name field of the Qualifiers region.

Attention: Once territories are defined and assigned to a territory type, you cannot change or delete the territory qualifiers or delete the territory type.

5. Check the Overlap Allowed check box, if appropriate.

   Overlap Allowed: Indicates whether qualifier values can overlap between territories of this type. For example, if values assigned to the qualifier *Postal Code Range* can overlap, then one value could be 94400 – 94410 and another value could be 94408 – 94420. If overlap is not allowed, Oracle Sales and Marketing does not let you assign a qualifier value to a territory if the value overlaps an existing value for a territory under the same type.

Assigning Territories

The Territories window lets you assign a territory to an employee or business partner and to enter the qualifier values for the territory qualifier(s) you selected in the Territory Types window.

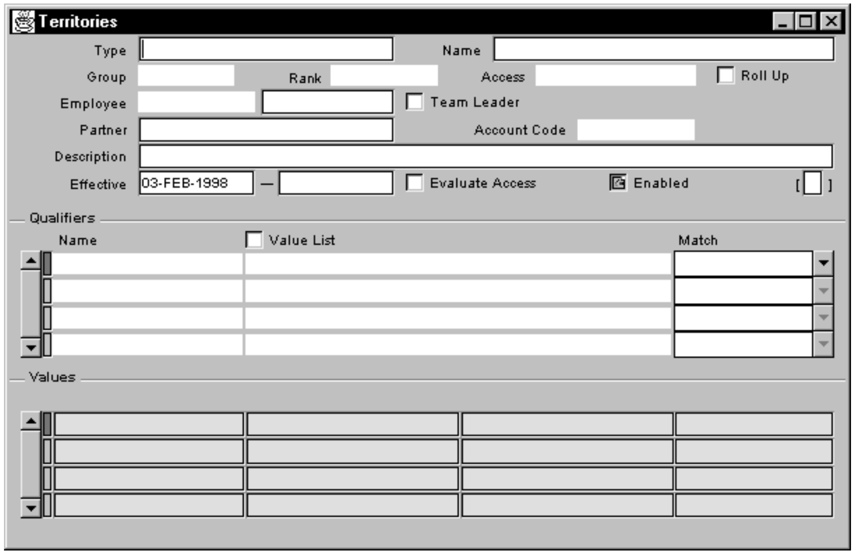
Prerequisites

❑ Territory Types must be entered.

▶ To assign a territory:

1. From the Navigator, Choose Setup –> Sales Organization –> Territories –> Territory to open the Territories window.

   Depending upon your user responsibility, setting the territory selections might be listed under the Setup / Organization option in the Navigator.



2. Enter the territory type in the Type field.

   Oracle Sales and Marketing fills in the Group, Rank, Access, and Roll Up fields with the values you entered in the Territory Groups and Territory Types windows and displays the list of territory qualifiers in the Qualifier column.

3. Enter a descriptive name for the territory in the Name field.

4. Enter the name of the person assigned to this territory in the Employee field.

   If you want to assign the territory to a business partner, enter the name of the business in the Partner field and their account number in the Account Code field.

   Attention: You cannot enter both an employee and a partner. If you enter a partner, they must be an established account in Oracle Sales and Marketing and must be defined as a sales partner on the Sales Force window.

5. The Team Leader check box allows full read and write capability over all lead, account, and contact records assigned to this territory. Although you may have more than one Team Leader within your sales team, consider that read / write access is a powerful capability, and use it with discretion. Each sales team should have at least one team leader.

6. Enter the start date this territory will become effective in the Effective field.

The start date is required for all except roll up territories. If you enter an end date, the territory is not activated until that date.

7. Enter an end date if you only want the territory to be active for a set period of time.

8. Check the Value List check box if you want the qualifier values to appear in the Value List column next to the Name column.

Suggestion: This feature is useful if you have more than one territory qualifier for a territory and you want to see all the values listed together. However, it slows down system response time, so use it only after you have entered all the values.

9. Choose Save on the toolbar to add the territory to the database.

▶ **To enter values for a territory qualifier:**

1. Select one of the territory qualifiers listed in the Name column.

2. Enter the qualifier values in the Values region.

   The fields in which you enter values depend on the territory qualifier. For example, if the territory qualifier is State, enter the state name in the Primary Value field. If the territory qualifier is Postal Code Range, enter the first number of the range in the Primary Value field and the last number of the range in the Secondary Value field. If the territory qualifier is Contact Interest, enter the contact interest type in the Interest Type field and, if you choose, the primary interest code and secondary interest code in the Primary Value and Secondary Value fields, respectively. If you are using a roll up territory as a qualifier value, enter the name of the roll up territory in the Primary Value field. Oracle Sales and Marketing highlights the fields you need to enter values in, based on the selected qualifier.

3. Choose Save on the toolbar to add the values to the database.

The Access Window

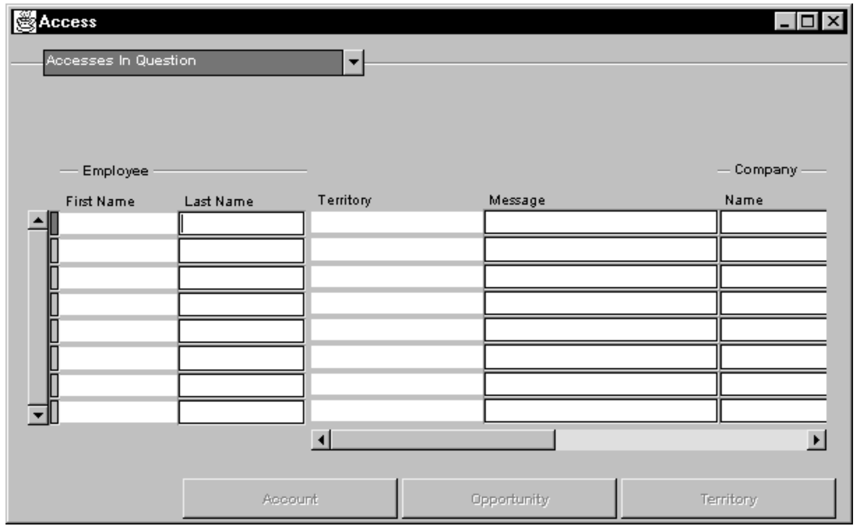
The Access window lets you view and create territory access records for an account or lead, to freeze existing territory assignments, or to reassign an access. You can view access privileges by account, lead, employee, territory, or partner.

If an account or lead is erroneously assigned to a territory, a sales representative can request that it be reassigned by sending notification to the territory administrator. You, as territory administrator, use the Reassignment region of the Access window to view all reassignment requests.

If you make changes within the Access window, remember to freeze an assignment so the Territory Access program doesn't change it. To freeze assignments, check the Freeze check box that appears in most of the region poplists described.

▶ To see territories to be reassigned:

1. From the Navigator, choose Setup –> Sales Organization –> Territories –> Accesses to open the Access window.
2. Select the Accesses in Question tab in the Access window.



3. Choose Query to search for outstanding reassignment requests.

   Any reassignment notifications will be presented. Check the message provided with the reassignment request for instructions.

▶ To reassign a territory:

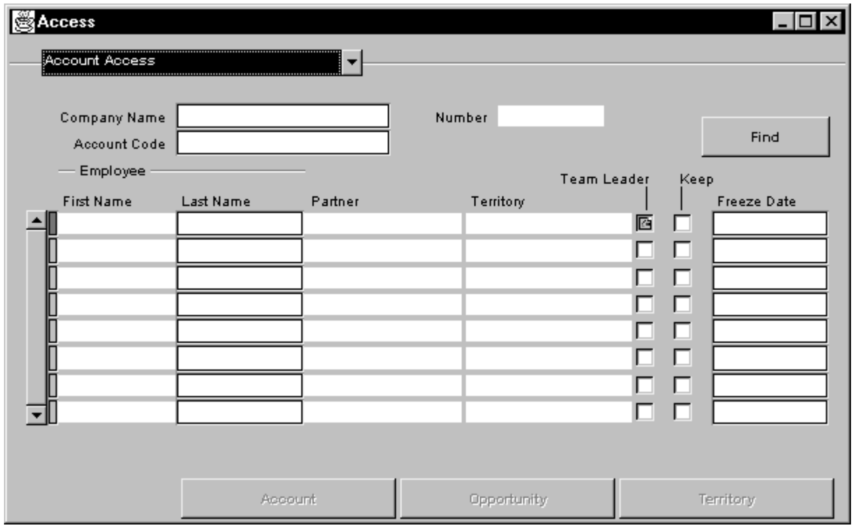
1. Reassign the account or lead to the appropriate territory by changing the territory information displayed in the Reassignment window as appropriate.

   ☞ **Attention:** It's important to correct the cause of the incorrectly assigned territory in the account, lead or territory information because the next time the Assign Territory Access Program runs, it will reassign the account or lead back to its original (incorrect) territory.

2. Choose Save on the toolbar to add the reassigned territory to the database.

▶ **To view or manually update territory assignments for an account:**

1. Select the Account tab.



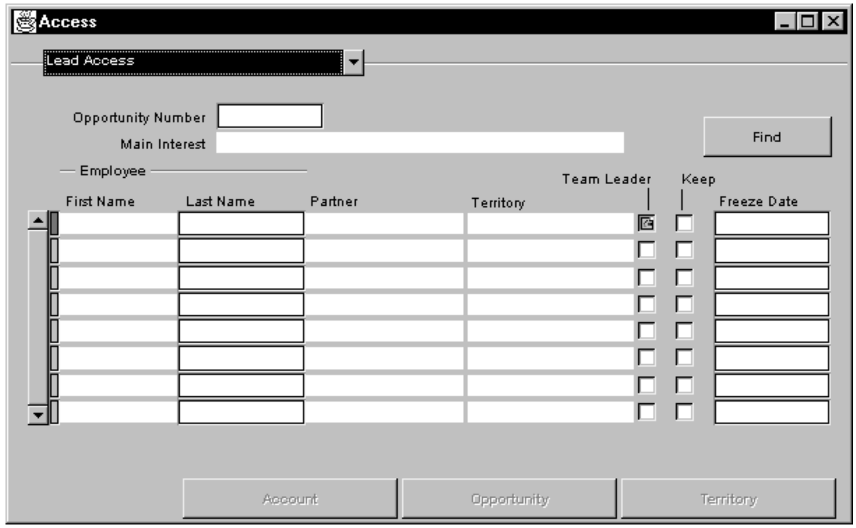
2. Enter the account's identifying information in the Customer Name, Number, and Account Code fields.
3. Choose Find.

   The system displays all employees and/or partners having access to the account along with the territory name and access type.
4. Enter an employee or partner and check the Keep check box.

   If you are adding an employee or partner who would not normally have access to this account, check the Keep check box so that the assign territory access program will not try to reevaluate the assignment.
5. Check the Team Leader check box for the respective employee or partner.
6. Choose Save on the toolbar to add the assignments for an account to the database.

▶ **To view or update territory assignments for a lead:**

1. Select the Opportunity tab.



2. Enter the opportunity number.

3. Choose Find.

   The system displays all employees and/or partners having access to the opportunity along with the territory name and freeze date.

4. Enter an employee or partner and check the Keep check box.

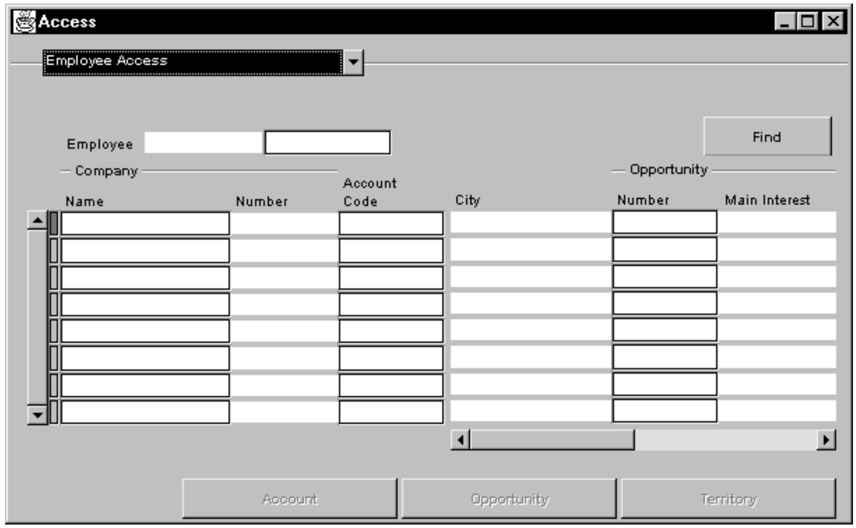
   If you are adding an employee or partner who would not normally have access to this lead, check the Keep check box so that the Assign Territory Access program will not try to reevaluate the assignment.

5. Check the Team Leader check box for the respective employee or partner.

6. Choose Save on the toolbar to add the assignments for a lead to the database.

▶ **To view or manually update territory assignments for an employee:**

1. Select the Employee tab.



2. Enter the employee's name.

3. Choose Find.

   The system displays all accounts assigned to this employee along with an opportunity number and main interest. If applicable, it might display the territory name and freeze date.

4. Add an account.

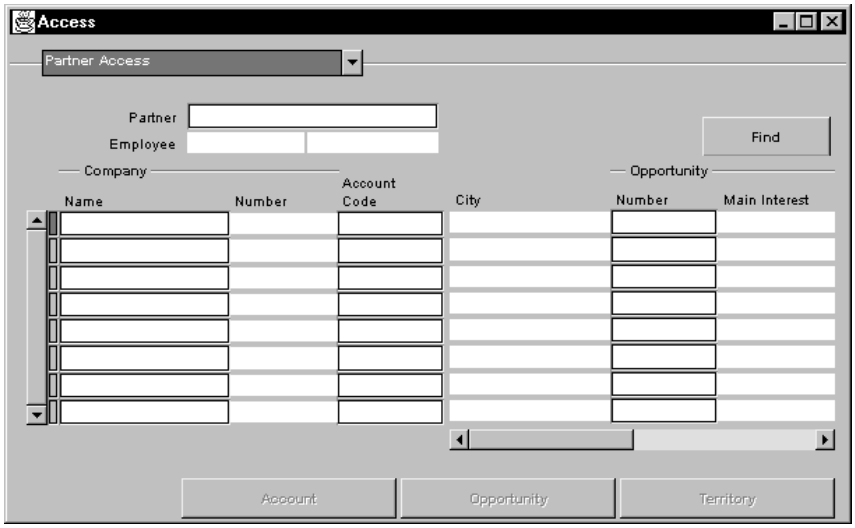
   If you are adding an account that would not normally be assigned to this employee, check the Keep check box so that the assign territory access program will not try to reevaluate the assignment.

5. Check the Team Leader check box for the respective employee or partner.

6. Choose Save on the toolbar to add the assignments for an employee to the database.

▶ **To view or manually update territory assignments for a partner:**

1. Select the Partner tab.



2. Enter the partner's name.
3. Choose Find.

   The system displays all accounts assigned to this partner along with an opportunity number and main interest. If applicable, it might display the territory name and freeze date.

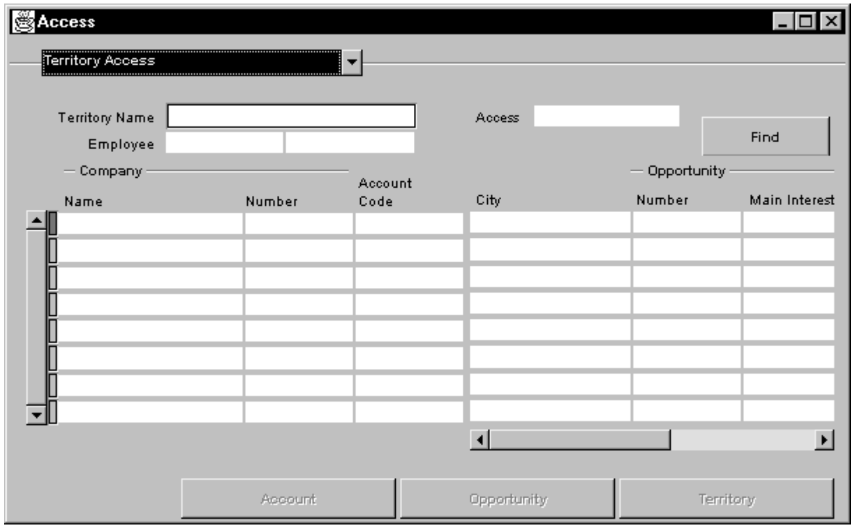
4. Add an account.

   If you are adding an account that would not normally be assigned to this partner, check the Keep check box so that the assign territory access program will not try to reevaluate the assignment.

5. Check the Team Leader check box for the respective employee or partner.
6. Choose Save on the toolbar to add the assignments for a partner to the database.

▶ **To view accounts belonging to a particular territory:**

1. Select the Territory tab.



2. Enter the territory name.
3. Choose Find.

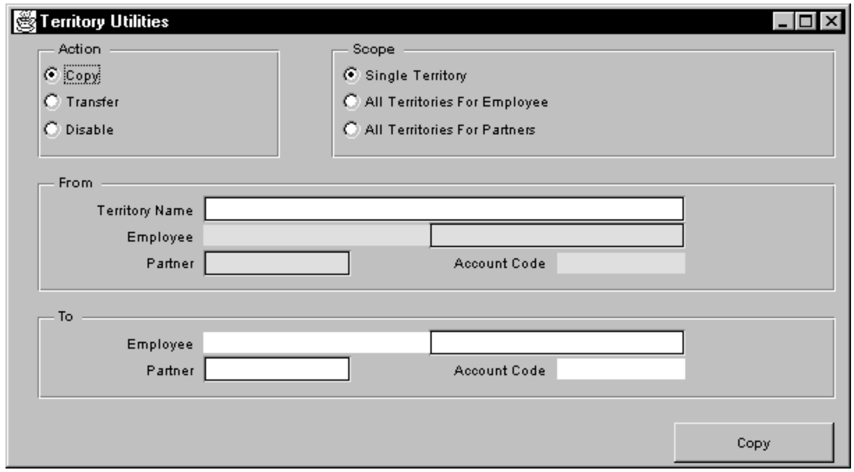
   The system displays all accounts assigned to this territory along with an opportunity number and main interest. If applicable, it might display the territory name and freeze date.
4. Check the Team Leader check box for the respective employee or partner.

Territory Utilities – Copying, Transferring, or Disabling Territories

The Territory Utilities window helps you manage established territories by letting you copy or transfer a single territory or all territories for an employee or partner to another employee or partner. You can also use this window to disable a single territory or all territories for an employee or partner.

▶ **To use the Territory Utilities window:**

1. From the Navigator, choose Setup –> Sales Organization –> Territories –> Utilities to open the Territory Utilities window.



2. Select the desired action: Copy, Transfer, or Disable from the Action region.

3. Select the desired scope of the action: Single Territory, All Territories For Employee, or All Territories For Partner in the Scope region.

4. Specify the territory name, employee, or partner.

   If the scope is for a single territory, enter its name in the Territory Name field of the From region.

   If your action is a *copy* or *transfer*, enter the name of the employee or partner you are copying or transferring from in the From region, and the name of the employee or partner you are transferring to in the To region. Choose Copy.

   If your action is *Disable*, enter the employee's or partner's name in the From region.

CHAPTER

14 Forecasting Sales

The forecasting module within Oracle Sales and Marketing lets you project where you're going and assesses where you have been.

The following topics are included:

The following tasks are included:

Overview of Forecasting Sales

Oracle Sales and marketing provides an easy way for sales representatives and managers to build their sales forecast. By combining actual data from Oracle Sales and Marketing's opportunity management system with sales representatives judgement, companies can obtain accurate and reliable forecasts. Additionally, managers also have the ability to adjust the sales representatives forecasts at the opportunity or aggregate levels.

The Enter Forecast tab within the Workbench contains two sub menus:

Enter Forecasts: Lets you view and adjust individual and group forecast information.

View Forecasts: Lets you view forecasting and pipeline information in a variety of ways.

Definitions – Opportunity Status Values

An opportunity becomes part of your forecast when its status is *Won, Forecasted,* or *Upside*. Sales and Marketing automatically sets the status to *Forecasted* when the win probability reaches or exceeds a predetermined level. Your implementation team determines what that level is. Your implementation team also determines whether you are permitted to override the opportunity status.

Possible opportunity status values are:

Preliminary: Opportunities with a preliminary status are not included in the reference totals on the Forecast window, and are not visible from the Opportunity Adjustments window.

Upside: This status is assigned to opportunities that are further along than Preliminary, but do not have the win confidence of a Forecasted opportunity. These are included in the Upside totals on the forecast screen. These opportunities also appear on the Opportunity Adjustments screen.

Forecasted: The opportunity is far enough along in the sales cycle that you reasonably expect it to close by the date indicated. Opportunities with a forecasted status will appear in the pipeline aggregate on the Forecast tab and on the Opportunities Adjustment window.

Won: Used for opportunities that have been closed successfully.

Dealer: For opportunities that are being worked through a partner or reseller.

Expired: For opportunities that are closed due to inactivity. The length of time before an opportunity expires is determined by your implementation team.

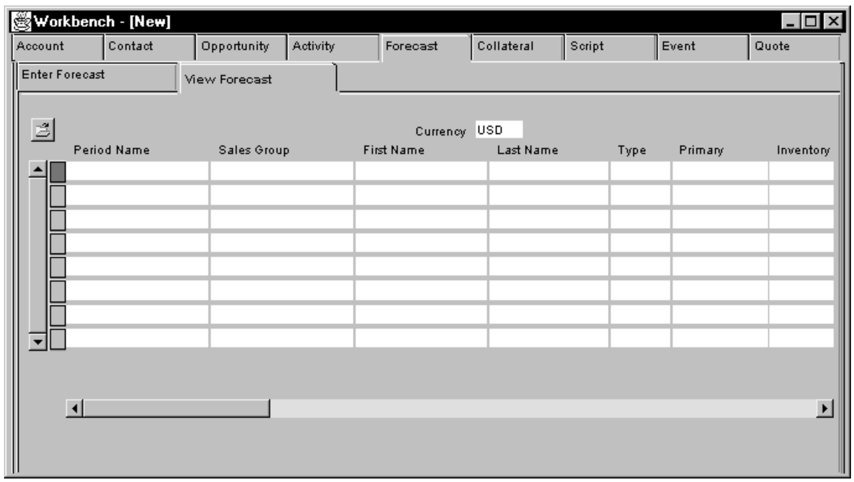
No Opportunity: This status is for opportunities that close without a sale.

Lost: This status is assigned to opportunities lost to competitors.

Viewing Forecast Information

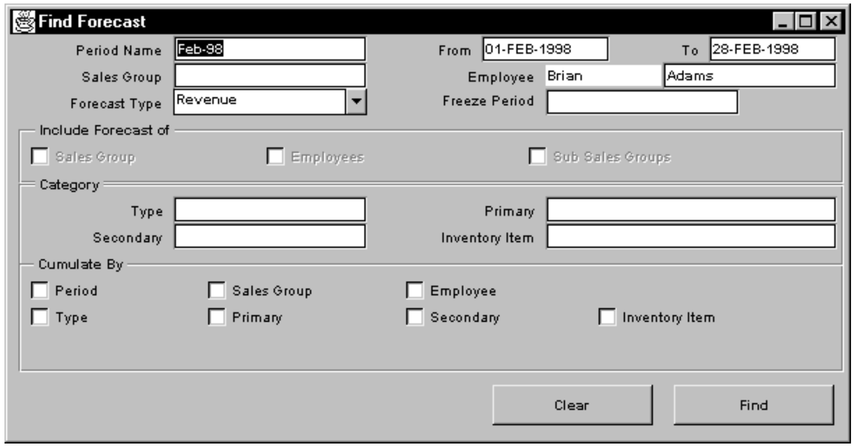
The View Forecast window is a view–only window. You can use folder tools (from the Folder menu) to customize the screen to suit your needs.

You can use the View Forecast window to view forecast information in a variety of ways.



▶ **To find forecast information:**

1. Enter search criteria in the Find Forecast window.



Search criteria can be as general as all forecasted information for your group or your own account, or as specific as forecasted business for a specific account within a date range. Note the default settings:

Period Name: Displays the current forecast period and the calendar from and to dates that define this period.

Sales Group: Displays the sales group you belong to.

Forecasts of: If you are a manager, the field defaults to Group / Sub Group; otherwise, it defaults to Member and your name appears in the Employee field.

Forecast Type: Defaults to Revenue.

The following information is displayed:

General Information

- The period start and end
- Forecast type set to revenue
- Your employee name as an individual member of group or manager of group.

Revenue Amount Information (Amount Region)

Specify amount of revenue to search for by selecting a type of revenue amount from the poplist. Specify a period of time in the From and To fields, if other than the default period.

Aggregate Information (Cumulate By Region)

The Cumulate By region lets you cumulate your opportunities by one or more parameters. For example, if you want to see all quota credit information for the period, by customer, check the corresponding boxes in this region (and choose Quota Credit in the Type field of the Amount region).

2. Modify the default search criteria, if appropriate.
3. Choose Find.

Forecasting Revenue

Your sales administration department keeps track of all sales representatives and their managers within Oracle Sales and Marketing. One of the key uses of this information is for rolling up sales forecasts. When a sales representative complete their forecast, it is passed up to their manager. The manager's forecasts are passed up accordingly until a company–wide forecast is generated.

The Forecast window lets you review and enter sales forecasts for yourself or your sales group. Forecasts are tied to accounting periods and product lines, as defined by your implementation team.

▶ **To review or enter new information into a forecast:**

1. Enter search criteria in the Find Forecast window.

   Search criteria can be as general as all forecasted information for your group or your own account, or as specific as forecasted business for a specific account within a date range. Note the default settings:

   Period Name: Displays the current forecast period and the calendar from and to dates that define this period.

   Sales Group: Displays the sales group you belong to.

   Forecasts of: If you are a manager, the field defaults to Group / Sub Group; otherwise, it defaults to Member and your name appears in the Employee field.

   Forecast Type: Defaults to Revenue.

For each period and each quota category, Sales and Marketing displays your quota, together with the total revenue credit from the pipeline that is already won, forecasted to close during the period, and upside for the period.

Sales and Marketing calculates and displays the percent of quota that you have achieved to date, based on the amounts already won.

▶ **To see a backlog of opportunities:**

If you have active opportunities that were expected to close during an earlier period but didn't, the Backlog button is enabled.

- Choose Backlog to display the Opportunity window.

  All opportunities that should have closed before this forecast period but haven't yet, are displayed.

▶ **To see a history of your forecasts:**

1. Select a forecast.
2. Choose History.

   A list of your earlier forecasts for the period appears.

Adjusting Your Revenue Forecast and Quota Credits

The Adjustments button is only available when the user is recognized in the database as a reporting manager. A manager who has permission to view and adjust forecast information can select either forecast amount information or sales quota information to display within the Forecasting Adjustment window.

Forecast amounts are presented by product type, primary and secondary codes, and item type, depending on what level you set your sales quotas.

Each sales group and employee involved in the forecast for this designated period is shown. The manager can adjust the amounts in the forecasted and upside columns. Should you make changes to the information, your name, the date, the time, and the previous value, are recorded in the History window.

You can view other forecast revenue and quote credit information as follows:

- If you wish to see a list of opportunities this employee is working on, choose the Opportunity button.
- If a particular sales group has sub–organizations working with it, for example, a Western Sales group is comprised of California, Oregon, and Washington subgroups, the Sub Sales Groups button is activated. Choose this button to see detailed information.
- If the employee has opportunities that were expected to close during an earlier period but didn't, OSM highlights the Backlog check box and enables the Backlog button. Choose Backlog to display the Opportunity window showing the backlogged opportunities.

▶ **To adjust a sales forecast record:**

1. Make your adjustments to individual employee records. When you are satisfied with the adjusted figure, check the Commit check box.
2. Check the Reviewed check box to indicate that you have reviewed the record for that period.
3. Choose Save on the toolbar to add the record to the database.

CHAPTER

15

Generating Customer Quotes

This chapter explains how Sales and Marketing quotation system can be used to generate real–time pricing and inventory availability information for customers considering a purchase.

The following topics are included:

The following tasks are included:

Overview of Generating Customer Quotes

With Oracle Sales and Marketing quotation system, you can access pricing and order history and apply discounts based on information in your database. Quotes are formulated to describe products and services giving list prices and possible discounts. In this manner, Oracle Sales and Marketing can establish and track a sales cycle: from opportunity, to generating a quote, taking an order, tracking its progress, and completing the shipment.

Accessing Privileges and Quotes

The Quote window follows the access privileges given with territory access. If you have *full* territory access, you can draft a quote for any account within Oracle Sales and Marketing. If you have *territory* access, you can only see and access the accounts in which you are designated to be on the sales team or on the opportunity team for that account. If you have *prospecting* access, you can see all account or contact information, but you cannot copy, print, or change the status of a quote unless you are assigned to the sales team or to the opportunity team.

Integrating Quotes with Opportunities

Quotations are integrated with Opportunities in two ways.

- Create a quotation from an opportunity by entering the opportunity number into the Quote window. The default account information includes customer name, customer number, account code, company comment, any account comments made, and sales credits. Sales accounting information, such as commission amount, is included in the new quote when it is generated from an opportunity.
- Create a new quotation and when you do, the quotation information is translated into an opportunity. The opportunity created is given the status of *Preliminary*. Sales credit is given to the employee designated in the Quotes window.

What Can Be Quoted?

The following items can be quoted:

- Products ready for sale
- Products that have a valid inventory item number and an associated price list
- Services

Setting Up Quotes

On the user level, you should set the following profiles:

- The *OSM: Order Entered State* should be set to either *Booked* or *Entered,* depending on how your organization enters orders into your Oracle Order Entry system when the status changes from Quoted to Order.
- The *OSM: Quote Order Type* determines the order type of the converted order. This order type should contain default standard value rule sets, price list, and order cycle information.

Sales Credit

Sales credit information is coordinated between the Oracle Receivables definition of a sales representative and the Oracle Sales and Marketing sales representative definition. These two definitions must agree.

Price Adjustments

Price adjustments can be made to a quote or corresponding order line according to the *OSM: Quote Discount Privilege* profile option you have established within Oracle Sales and Marketing.

To provide for manual adjustment of discounts, three options are available to you at the user level:

- *None:* Permits no discounting.
- *Full:* Allows discounting by rules set up in Oracle Order Entry.
- *Unlimited*: Assumes full discounting, but also lets the user override the discount and enter another amount.

When generating a quote, Oracle Sales and Marketing uses pricing and discount data defined in Oracle Order Entry. The tax calculation feature of Oracle Receivables lets you calculate VAT, Japanese Consumption Tax, or Canadian GST / PST. Once invoice tax calculation is properly set up in Oracle Receivables, Oracle Sales and Marketing calculates the tax for you.

Standard Value Rule Sets

Your Standard Value Rule Sets are set by default by the Order Type you or your organization designate.

Quote Status

The status of a quote changes throughout the life cycle of its function. When you have created a quote and it has reached a certain status, you can look back at the history of the quote and see when a quote status was changed.

Quote Versions

Oracle Sales and Marketing keeps track of your iterations of a quote, marked by the quote number, as a *version*. A quote number and version uniquely identify a quote version.

Creating new versions of a quote maintains an audit trail of that quote process. All change information is preserved. A version cannot be changed; a new version is created, unless the version has a status of *drafted*.

Constructing a Quote

You can construct quotations for existing customers only. To draw customer information into a new quotation, you can use one of the following methods:

- Select the customer information for a new quotation by querying the company name or entering the information in the fields of the Quote window.
- Enter the number of an existing opportunity and Oracle Sales and Marketing fills in the customer information and expected purchase line items from the opportunity.
- If the quote is associated with a promotion, and a special price list for that promotion, you can enter a promotion code within the Find Quotes window. When you enter the promotion code in this window, Oracle Sales and Marketing loads the proper price list for the quote.

Three fields are defaulted into a new quote:

Expiration Date: This value is set by adding the value of the profile option *OSM: Quote Duration* to the current date. This default value is 30 days, but you can set it for longer or shorter period.

Price list: This is the from *OSM: Quote Order Type* profile option.

Currency Code: This is from the default price list.

When you enter an existing customer in the Company field, any price list and associated currency information for that customer replaces the default value.

Pre–Defined Quote Status

The status of a quote indicates the current stage of development a quotation has achieved. A quote can change status several times during its life cycle, and Oracle Sales and Marketing keeps automatic control of the cycle. The Quotation Status Log is updated for each quote version you make. The status is the only thing you can change on a quote version.

The available quote status terms are:

Drafted: Initial status.

Bid: Presented to customer.

Accepted: Customer accepted terms.

Order Problem: There is a problem with placing the order.

Order Reviewed: The order has been reviewed for conformance to Order Entry rules and processes.

Ordered: The order has been sent on to Order Entry for processing.

Lost: The quotation has not been accepted by the customer.

Inactive: No more activity on this quotation.

The following grid shows when and what you can change the status of a quotation to. Note that once a quote has been changed to the status of ordered, you cannot change the status, unless it is to order reviewed. The intent of rule enforced status change is to prevent a user from accidentally changing a quote status back to a non–ordered status.

From/To	Drafted	Bid	Accepted	Order Problem	Order Reviewed	Ordered	Lost	Inactive
drafted	No	Yes	Yes	Yes	Yes	No	Yes	Yes
bid	No	No	Yes	Yes	Yes	No	Yes	Yes
accepted	No	No	No	Yes	Yes	No	Yes	Yes
order problem	No	No	No	No	Yes	No	Yes	Yes
order reviewed	No	No	No	No	No	Yes	Yes	Yes
ordered	No	No	No	No	No	No	Yes	Yes
lost	No	No	No	No	No	No	No	Yes
inactive	No	No	No	No	No	No	No	No

Table 15 – 1 Changing the Status of a Quotation (Page 1 of 1)

▶ To create a new quote:

1. Enter the name in the Quote Name field.

   This is not a mandatory step, but helps to identify the quote.

2. Select a status from the Status field. Press the F9 key for a list of values.

   Drafted is usually the initial quote status, but you can choose any value from the list of values.

   See: Pre–Defined Quote Status: page 15 – 5.

3. Select the Opportunity Num field or the Company field depending on whether you are creating a quote from an opportunity or not. If you are creating a quote that does not have an existing opportunity, one is created for you.

   To create a quote from an existing opportunity:

   - Use the Opportunity Num field to draw in information from an existing opportunity. When you enter the number and leave the field, the company and item information is retrieved for you. If this quote is not from an opportunity, leave this field blank.

   If not from an opportunity:

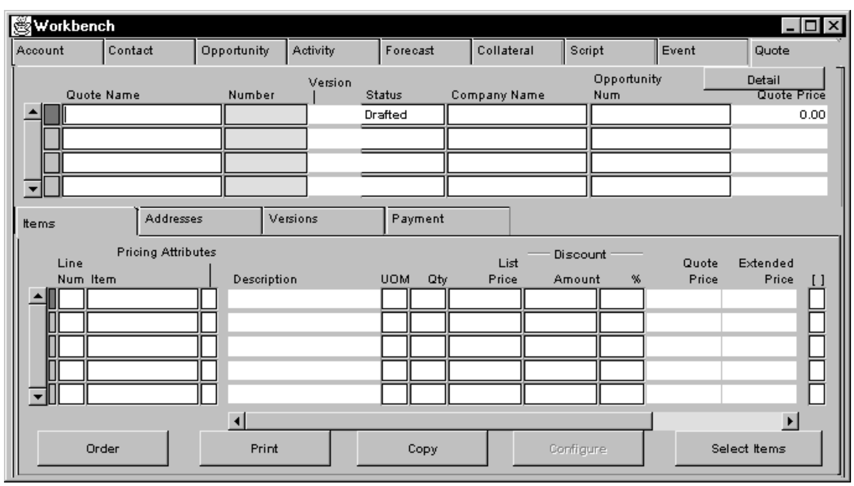
   - Use the Company field to select a customer from your database.
   - Enter the Account Code for the company.

4. Enter the sales representative name associated with the account in the Employee field.

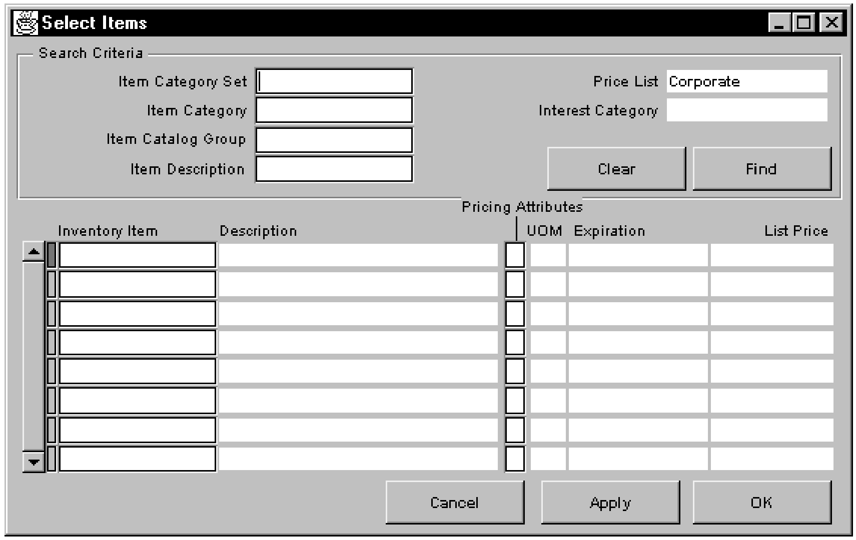
5. You can still change the Price List value by selecting the list of values. The list shows all valid price lists for the customer.

6. Enter line item information in the Items tab.

   - Choose the Select Items button to access the Find Items window. You can search for particular inventory items.
   - If you already know inventory item information, enter the information. You can press the F9 key for a list of values. The fields are validated by Order Entry.



7. Choose the Select Items button to find specific line items to quote.



▶ **To search for and select an item:**

The Select Items window lets you search by: Item Category Set, Item Category, Catalog Group, or Item Description. You can retrieve a list of all inventory items by choosing Find.

Note: Items are selected when the line item color changes to blue.

1. To select a single item, press the Control key on your keyboard and click the left mouse button.
2. To select several single lines, press the Control key, then select each single line with a click of the left mouse button.
3. To select a group of lines, press the Control key and select the first line, then press the Shift key and select the last line in the group.
4. If you make a mistake or change your mind, the select process toggles. Click once, the line is selected. Click a second time and the line is deselected.
5. When you have made your selections, choose OK to add the line items to your quote.

The Apply button adds lines to your quote, and is useful if you are adding several items from different item categories. When you choose the Apply button, the Select Items window is not closed.

When you return to the Quote window, your items are added to the Items lines. The lines are not automatically numbered, so if you have many lines in your quote, you may need to add line numbers.

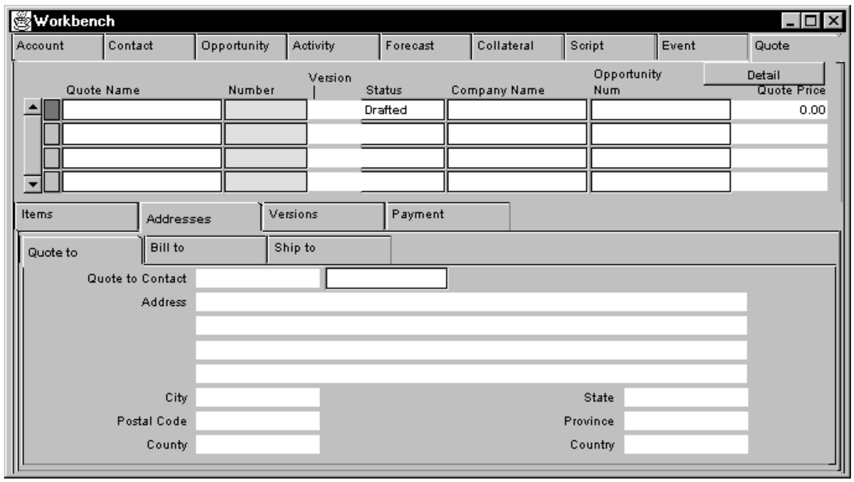
If you need to adjust the quantity of an individual item, you can enter a new number in the quantity field. The extended price field shows the total for that quantity of the item.

The total for all items and the List Price is shown in the header region of the Quote window. The List Price, together with any discounts (as taken from the price list and discounting information for this customer) are added to result in the Quote Price.

Entering Address Information

▶ **To enter address information:**

1. From the Quotes window, select the Addresses sub tab.

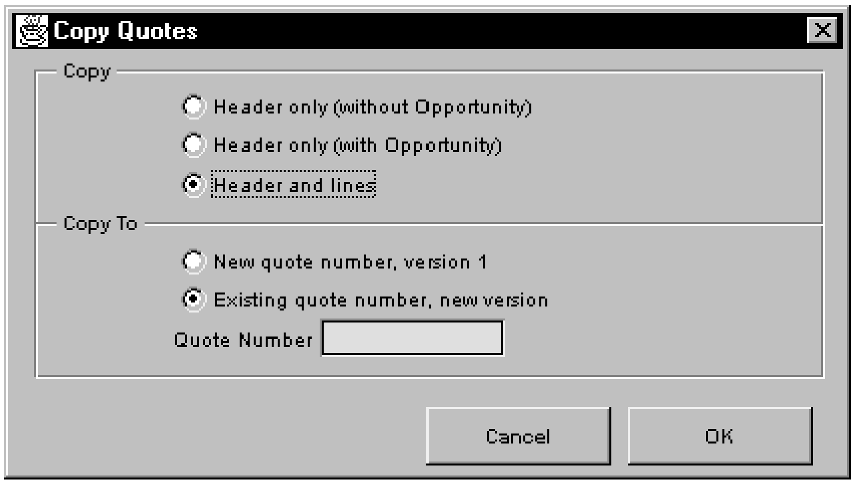


2. Enter the address information in the appropriate sub tab:
   - The *Quote to* sub tab asks you to select a contact from a list of values. The address shown is that of the account code.
   - The *Bill to* sub tab asks you to select a billing address from a list of values for this account. Addressing information is drawn in from the contact information.
   - The *Ship to* sub tab displays a contact selected from list of values; default address for this person is from the contact information.
3. Choose Save on the toolbar to add the address information to the database.

Copying Quotes and Creating Quote Versions

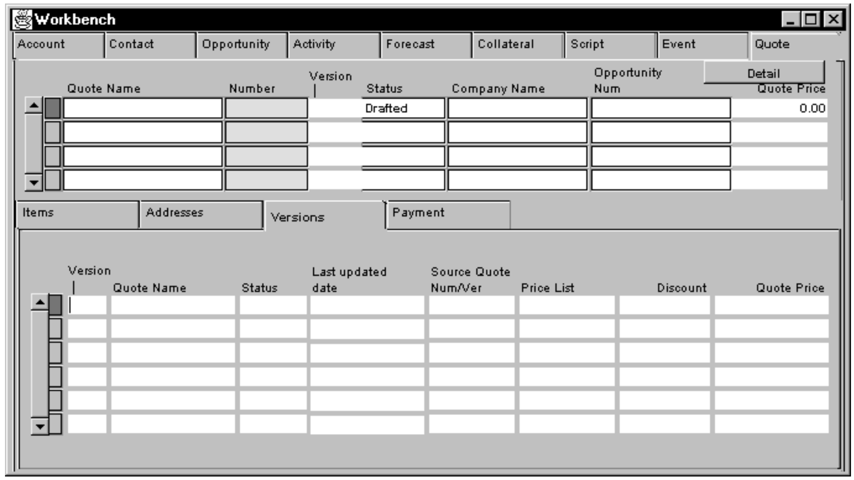
To copy a quote that contains most of the relevant information to create a new quote based on the current one or a *version*, select the Items sub tab and choose the Copy button. You can choose between copying the header only or copying the header and the item lines below.

You may also choose between copying the information to a new quotation number, making a complete new entity, or using the existing quotation number to create the next version. The advantage of creating a new version comes from the simple tracking method contained within the window. The Versions sub tab tracks the number, date, and status of the quote version.



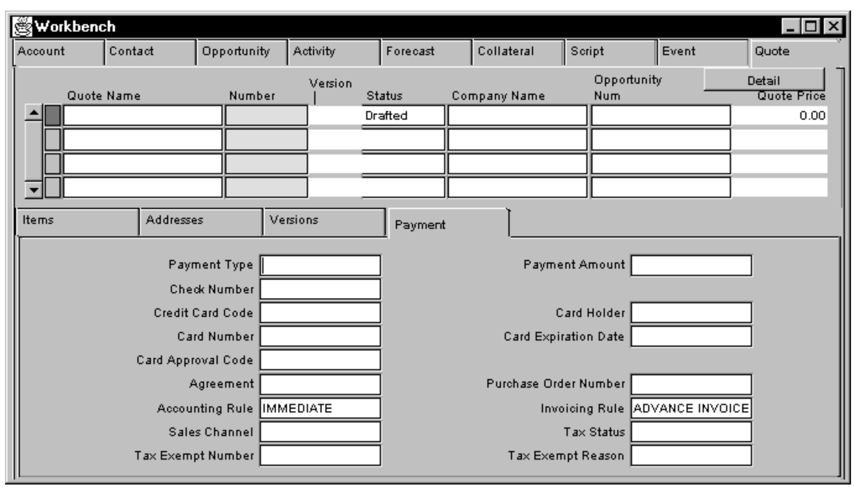
The Versions Tab

If you have copied a quote, the version history is contained in the Versions sub tab**.** Versions are listed from last to first. The last updated date is shown for each quote. The source quote number and the version number are shown. By drilling down on each line entry, you can see the detail of that version. This is often a useful feature when a customer has subtle changes to a quote, or can show how a quote evolves over time.



Payment Information

Payment information is taken from Order Entry. Each order that is sent as a quote from Sales and Marketing must have all relevant fields in this form answered. Most fields on the Payment window are defaulted from Order Entry, if the account has an order type in the system. The default order type also contains information such as the agreement and invoicing rules.



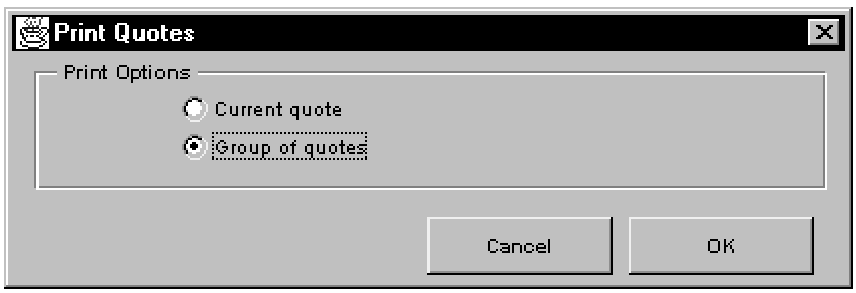
If the customer you are quoting for has a *tax exempt status***,** you can indicate this information in the Tax Status and the Tax Exempt Number fields in this window. Indicate the reason in the Tax Exempt Reason field.

If the customer you are quoting for is *paying by credit card***,** you can note the type of card in the Credit Card Code field, and then enter pertinent information in the Card Number, Card Holder, and Card Approval Code fields. This information is passed to Order Entry for processing.

The customer's PO number should be entered in the PO Number field.

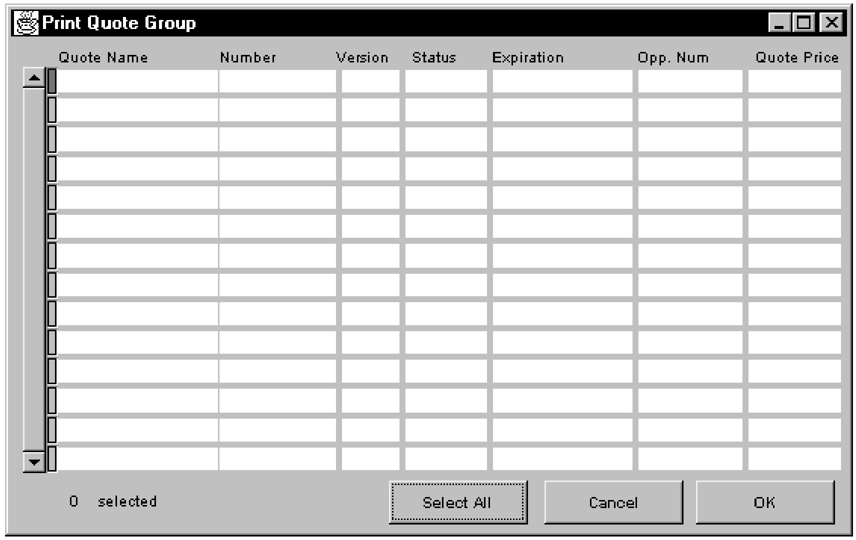
Printing Quotes

You can choose the Print button to print a quotation. The Print Quote feature allows single quotes or a group of quotes to be printed.



When you choose the Print button, the window lets you choose whether you would like to print the current quote or whether you would like to print a group of quotes on your screen .

To better organize quotes, all quotes can be grouped together for printing for a customer. You can also provide sets of quotes based on expected or projected purchases. Use the mouse and the Control key to select multiple entries.



When you select one or a group of quotes for a customer's review, Oracle Sales and Marketing opens Microsoft Word®. The customer information is translated into a form letter, filling in the customer name, address, your standard salutation, and any standard terms and conditions that you may commonly send out with your quotations. The line item information from your quote is presented as a table.

The Quote Letter

When you choose Print in the Quote window, the form letter specified in *OSM: Quote Letter* is opened within Microsoft Word. The form letter template is a public letter that is accessed by all users. If you have installed the product with its default configuration, the template letter has been designated in the default profile option *OSM: Quote Letter*. This is a generic letter that contains *merge tokens* that place customer information where the merge tokens are located. This information includes name, address, salutation information, price list, and other general information. Your site may have added standard paragraphs to this template to accommodate your sales needs. For example, this information can include the period of time the quote is good for, and other relevant terms of the sales agreement. The signature on the letter is the name designated in the Employee field on the Quote window. Finally, all quote lines are displayed in table form.


Susan Pepper
1111 Alameda
SAN JOSE, CA 95013

Dear Ms. Pepper,

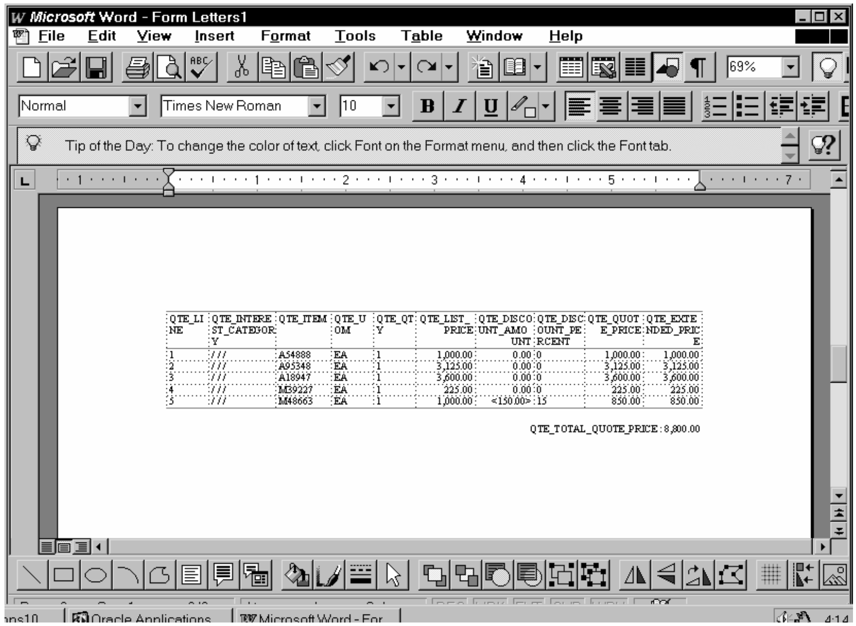
Thank you for your interest in the Black Cat family of products. The quotation you requested for the items shown below is effective for thirty (30) days from the date of this letter.

We look forward to your business and the opportunity to serve you further. Should you have any further questions regarding Black Cat products, please do not hesitate to call me.

Sincerely,

Joanne Babunovic
Joanne Babunovic

The formulated lines from the quote letter are shown below.



QTE_LINE	QTE_INTEREST_CATEGORY	QTE_ITEM	QTE_UOM	QTE_QTY	QTE_LIST_PRICE	QTE_DISCOUNT_AMOUNT	QTE_DISCOUNT_PERCENT	QTE_QUOTE_PRICE	QTE_EXTENDED_PRICE
1	/ / /	A54888	EA	1	1,000.00	0.00	0	1,000.00	1,000.00
2	/ / /	A95348	EA	1	3,125.00	0.00	0	3,125.00	3,125.00
3	/ / /	A18947	EA	1	3,600.00	0.00	0	3,600.00	3,600.00
4	/ / /	M39227	EA	1	225.00	0.00	0	225.00	225.00
5	/ / /	M48663	EA	1	1,000.00	<150.00>	15	850.00	850.00

QTE_TOTAL_QUOTE_PRICE : 8,800.00

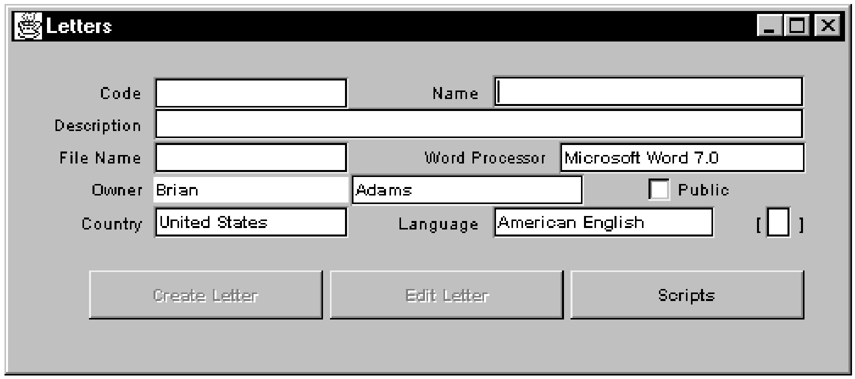
You can edit the letter, save it, and give it a name other than the template letter name. You can personalize any of the information from the template, and also print the letter on your local printer.

Customizing the Quote Letter

You may supersede the default letter by specifying a letter of your own in the User profile field of *OSM: Quote Letter.*

▶ **To create your own quote letter template:**

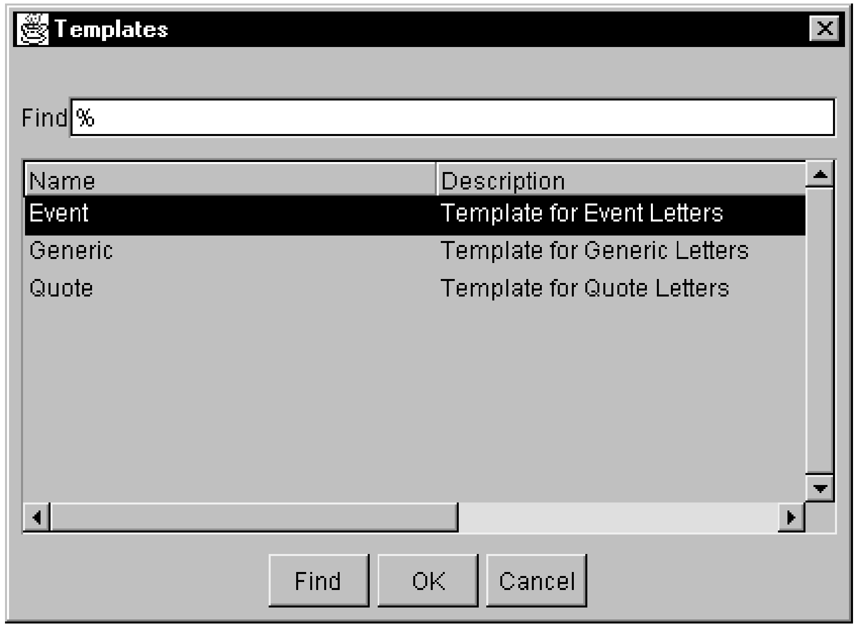
1. From the Navigator, choose Events –> Letter.



2. Name the letter.
3. Give the file a name (maximum 8 characters).
4. Choose a word processor. Press the F9 key for a list of values.

   The Create Letter button is activated.
5. Choose the Create Letter button.

   The Templates window appears.



6. Select Quote from the list of letter names.
7. The quote template letter opens within Microsoft Word.

   The fields with <<text>> are *merge token* fields that supply customer information.

   You can change the salutation or insert text in the body of the letter.

   If you want to insert more merge tokens to insert more information into the letter, choose the Insert Merge Field button. You will see a list of all available merge tokens. Select one to insert it.
8. Save the letter.
9. Navigate to Setup –> Personal Profile and bring up *OSM: Quote Letter.*
10. Enter the name of your quote letter in the User Value field.
11. Navigate to Workbench –> Quote tab.

    When you print your quotations, your template letter is used to formulate the letter.

APPENDIX

A

Windows and Navigator Paths

This appendix shows you the default navigator path for each Oracle Sales and Marketing window. Refer to this appendix when you do not already know the navigator path for a window you want to use.

Sales and Marketing Windows and Navigator Paths

Although your system administrator may have customized your navigator, typical navigational paths include the following:

Note: Text in brackets ([ ]) indicates a button. Text in parentheses ( ) indicates a sub tab.

Window Name	Navigation Path
Access: page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses
Access (Accesses in Question): page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses > (Accesses in Question)
Access (Account): page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses > (Account)
Access (Employee): page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses > (Employee)
Access (Opportunity): page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses > (Opportunity)
Access (Partner): page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses > (Partner)
Access (Territories): page 13 – 28	Navigator > Setup > Sales Organization > Territories > Accesses > (Territories)
Account: page 2 – 6	Navigator > Workbench > Account
Account (Address): page 2 – 6	Navigator > Workbench > Account > (Address)
Account (Classifications): page 2 – 14	Navigator > Workbench > Account > (Classifications)
Account (Company Profile): page 2 – 8	Navigator > Workbench > Account > (Company Profile)
Account (Environment): page 2 – 12	Navigator > Workbench > Account > (Environment)
Account (Employees): page 2 – 16	Navigator > Workbench > Account > (Employees)
Account (Partners): page 2 – 16	Navigator > Workbench > Account > (Partners)
Account (Phones): page 2 – 10	Navigator > Workbench > Account > (Phones)
Activity Detail: page 6 – 11	Navigator > Workbench > Activity > [To Dos]
Advertisements: page 10 – 4	Navigator > Promotions > Advertisements

Window Name	**Navigation Path**
Answer Actions: page 11 – 15	Navigator > Mail Reponses > [Action]
	Navigator > Use a Call Script > [Action]
Contact (Summary / Detail): page 3 – 4	Navigator > Workbench > Contact > [Summary / Detail]
Contact (Work Classification): page 3 – 6	Navigator > Workbench > Contact > (Work Classification)
Contact (Private Address): page 3 – 8	Navigator > Workbench > Contact > (Private Address)
Collateral: page 4 – 2	Navigator > Workbench > Collateral
Collateral: page 9 – 12	Navigator > Mailings > Collateral
Collateral: page 9 – 15	Navigator > Telemarketing Workbench > Collateral
Collateral (Private Address): page 4 – 7	Navigator > Workbench > Collateral > (Private Address)
Collateral (Requested Items): page 4 – 7	Navigator > Workbench > Collateral > (Requested Items)
Collateral (Shipment): page 4 – 7	Navigator > Workbench > Collateral > (Shipment)
Collateral (Work Address): page 4 – 7	Navigator > Workbench > Collateral > (Work Address)
Contact (Interests): page 3 – 9	Navigator > Workbench > Contact > (Interests)
Contact (Phones): page 3 – 11	Navigator > Workbench > Contact > (Phones)
Contact (Profile): page 3 – 13	Navigator > Workbench > Contact > (Profile)
Copy Actions: page 11 – 9	Navigator > Promotions > Scripts > [Questions] > [Copy Actions]
Copy Promotions: page 12 – 5	Navigator > Promotions > Copy Promotions
Customer Order: page 7 – 6	Navigator > Account Management > Order History > [Find Order Lines]
	Navigator > Account Management > Order History > [Find Orders]
Customer Order Line Summary: page 7 – 5	Navigator > Account Management > Order History > [Find Order Lines]
Customer Order Summary: page 7 – 4	Navigator > Account Management > Order History > [Find Orders]
Event: page 4 – 2	Navigator > Workbench > Event
Event (Events Enrollment): page 4 – 5	Navigator > Workbench > Event > (Events Enrollment)
Event: page 8 – 2	Navigator > Events > Event
Event: page 8 – 22	Navigator > Workbench > Events > Event
Event Facility: page 8 – 13	Navigator > Events > Facility
Event Letters: page 8 – 28	Navigator > Events > Offering > [Roster] > [Letters]
Event Offering: page 8 – 6	Navigator > Events > Offering

Window Name	Navigation Path
Find Account or Contact (Advanced): page 2 – 4	Navigator > Workbench > Account
Find Account or Contact (Advanced): page 3 – 2	Navigator > Workbench > Contact
Find Account or Contact (Basic): page 2 – 2	Navigator > Workbench > Account
Find Account or Contact (Basic): page 3 – 2	Navigator > Workbench > Contact
Find Order History: page 7 – 2	Navigator > Account Management > Order History
Letter Merge: page 8 – 28	Navigator > Events > Letter Merge
Letters: page 9 – 5	Navigator > Letters
Letters: page 8 – 18	Navigator > Events > Letter
List Workbench: page 9 – 20	Navigator > Mailings > List Management > List Workbench
Mail Blitz: page 9 – 3	Navigator > Mailings > Mail Blitz
	Navigator > Workbench > Collateral > [New Letter]
Mail Responses: page 11 – 12	Navigator > Mail Reponses
Notes: page 6 – 4	Navigator > Workbench > Activity > [Notes]
Opportunities: page 5 – 3	Navigator > Workbench > Opportunities
Opportunity (Classification): page 5 – 16	Navigator > Workbench > Opportunities > (Classification)
Opportunity (Closing): page 5 – 12	Navigator > Workbench > Opportunities > (Closing)
Opportunity (Credits): page 5 – 10	Navigator > Workbench > Opportunities > (Credits)
Opportunity (Obstacles): page 5 – 11	Navigator > Workbench > Opportunities > (Obstacles)
Opportunity (Purchases): page 5 – 8	Navigator > Workbench > Opportunities > (Purchases)
Opportunity (Sales Team): page 5 – 17	Navigator > Workbench > Opportunities > (Sales Team)
Opportunity (Summary / Detail): page 5 – 6	Navigator > Workbench > Opportunities > [Summary / Detail]
Opportunity Adjustments: page 5 – 19	Navigator > Workbench > Opportunity Adjustments
Personal Collateral Kit: page 9 – 18	Navigator > Mailings Personal Collateral Kit
Process Mail Response: page 8 – 26	Navigator > Workbench > Events > Event > [Roster] > [Script]
Program: page 12 – 2	Navigator > Promotions > Program
Quote: page 15 – 5	Navigator > Workbench > Quote
Quotes (Addresses): page 15 – 9	Navigator > Workbench > Quote > (Addresses)

Window Name	Navigation Path
Quotes (Payment): page 15 – 11	Navigator > Workbench > Quote > (Payment)
Quotes (Versions): page 15 – 10	Navigator > Workbench > Quote > (Versions)
Requested Items: page 9 – 15	Navigator > Telemarketing Workbench > Collateral > [Requested Items]
Roster: page 8 – 25	Navigator > Workbench > Events > Event > [Roster]
Sales Groups: page 13 – 4	Navigator > Setup > Sales Organization
Sales–Related Jobs: page 13 – 3	Navigator > Setup > Sales Organization > Territories > Sales–Related Jobs
Salesforce: page 13 – 7	Navigator > Setup > Sales Force
Scripts: page 9 – 9	Navigator > Letters > [Scripts]
Scripts: page 11 – 2	Navigator > Promotions > Scripts
Scripts: page 12 – 2	Navigator > Promotions > Scripts > (Scripts)
Select Items: page 9 – 15	Navigator > Telemarketing Workbench > Collateral > [Select Items]
Select Items: page 15 – 5	Navigator > Workbench > Quote > [Select Items]
Send Collateral: page 4 – 7	Navigator > Workbench > Collateral >Send Collateral
Territories: page 13 – 25	Navigator > Setup > Sales Organization > Territories
Territory Groups: page 13 – 22	Navigator > Setup > Sales Organization > Territories > Groups
Territory Qualifiers: page 13 – 21	Navigator > Setup > Sales Organization > Territories > Qualifiers
Territory Types: page 13 – 23	Navigator > Setup > Sales Organization > Territories > Type
Territory Utilities: page 13 – 34	Navigator > Setup > Sales Organization > Territories > Utilities
Use a Call Script: page 8 – 26	Navigator > Workbench > Events > Event > [Roster] > [Script]
View Forecast: page 13 – 34	Navigator > View Forecast ??
Warehouse Merge Files: page 9 – 19	Navigator > Mailings > Letter Merge

APPENDIX

B Standard Menus

This appendix contains tables that list the menus and submenus associated with each of the default responsibilities assigned in Oracle Sales and Marketing. As your site warrants, you may need to change menus to reflect the responsibilities of the job functions within your organization.

You will note that some of the menus are embedded several times, containing up to four levels of submenus. When planning your own menus we recommend that you build menus from the lowest function to the highest. This generally means planning functions on paper prior to building menus in the system.

Oracle Sales and Marketing Standard Menus

This section contains tables that list the menus and submenus associated with each of the default responsibilities assigned in Oracle Sales and Marketing. As your site warrants, you may need to change menus to reflect the responsibilities of the job functions within your organization.

You will note that some of the menus are embedded several times, containing up to four levels of submenus. When planning your own menus we recommend that you build menus from the lowest function to the highest. This generally means planning functions on paper prior to building menus in the system.

Menu Name	Navigation Prompt	Function	Description
AS_	To Dos List		List and assign action items
EVENT_	Events		Submenu for event management
ADMINISTRATOR		Event	Enter event name and description
		Event Offering	Schedule event offering
		Event Facility	Define event facility
		Letters	Create event–related letters
		Event Enrollment	Enroll contacts for event offerings
		Event Merge	Prepare event letter merge files
	Invitations		Submenu to prepare invitational mailings
		Letter	Prepare letter
		Collateral	Define collateral pieces
		Lists	Define lists
		Mail Blitz	Define mail blitz
		Warehouse Merge	Prepare invitation letter merge
	Scripts		Define promotional or evaluation scripts
	Find Account or Contact		Find account or contact

Table B – 1 Event Administrator (Page 1 of 2)

Menu Name	Navigation Prompt	Function	Description
	Personal Profile		Profile user values to enter your own personal user options

Table B – 1 Event Administrator (Page 2 of 2)

Menu Name	Navigation Prompt	Function	Description
AS_FIELD_	To Dos List		Use to organize action items
SALES_	Account Management		Submenu for accounts and contacts
REPRESENTATIVE		Find Account	Find account or contact information
		Dossier	Review customer dossier
	Opportunity Management		Manage your sales opportunities
	Forecasting		Forecasts to your management
	Mailings		Submenu to prepare contact mailings
		Collateral Package	Send collateral package
		Letters	Prepare letters
		Personal Collateral	Prepare personal collateral kits for customer mailings

Table B – 2 Field Sales Representative (Page 1 of 1)

Menu Name	Navigation Prompt	Function	Description
AS	To Dos List		Use your To Dos list
LEAD	Find account or contact		Find account or contact information
GENERATOR	Process mail response		Process inbound reply cards
	Mailings		Submenu to prepare contact mailings
		Collateral Package	Send collateral package
		Lists	Define lists
		Letters	Prepare letters
		Collateral Kits	Prepare collateral kit for personal use
	Personal Profile		Enter your own personal profile values here
		Profile User Values	

Table B – 3 Lead Generator (Page 1 of 1)

Menu Name	Navigation Prompt	Function	Description
AS_	To Dos List	To Dos items	Use your To Dos list
MARKETING_	Mailings		Submenu to prepare contact mailings
MANAGER		Collateral Package	Send collateral package
		Lists	Define lists
		Mail Blitz	Prepare for large promotional mailing
		Collateral	Send collateral
		Letter	Prepare letters
		Personal Collateral	Assemble personal collateral kits
		Collateral Categories	Define collateral categories
		Letter Merge	Prepare letter merge file

Table B – 4 Marketing Manager (Page 1 of 2)

Menu Name	Navigation Prompt	Function	Description
	Events		Submenu for event management / manage promotional events
		Event	Enter event name and description
		Event Offering	Schedule event offering
		Event Facility	Define Event facility
		Letters	Create event–related letters
		Event Enrollment	Enroll contacts for event offerings
		Event Merge	Prepare event letter merge files
	Advertisement		Define advertisements
	Scripts	Scripts	Define call or mail scripts
	Programs	Programs	Define marketing programs
	Copy Promotions	Copy promotion	Define new promotion by copying
	Mail Response	Process mail	Process inbound reply cards
	Word Processors	Word processor program	Define word processors
	Personal profile	Profile options	Profile user values

Table B – 4 Marketing Manager (Page 2 of 2)

Menu Name	Navigation Prompt	Function	Description
AS_	To Dos List		Submenu to manage To Dos items
SALES_		List	Use your list schedule and track To Doss items
MANAGER		Reassign	Reassign action items to others
	Account Management		Submenu to manage accounts

Table B – 5 Sales Manager (Page 1 of 2)

Menu Name	Navigation Prompt	Function	Description
		Find account or contact	Find account or contact information
		Contacts	Enter contact detail
		Dossier	Review customer information
		Customer Relationship	Define customer relationships
	Opportunity Management		Manage your opportunities
	Forecasting		Forecast your sales
	Mailing		Submenu to manage mailings
		Collateral Package	Send collateral packages
		Letters	Prepare letters
		Collateral Kits	Prepare collateral kits
	Personal Profile	Profile User Values	Create your personal profile options

Table B – 5 Sales Manager (Page 2 of 2)

Menu Name	Navigation Prompt	Function	Description
AS_SALES_	To Dos Lists		Submenu to manage To Dos list
AND_		List	List of action items on To Dos list
MARKETING_SUPERUSER		Reassign	Reassign items to others
	Account Management		Submenu of items related to account management
		Find account or contact	Find account or contact information
		Contacts	Enter contact detail
		Dossier	Review customer information
		Customer Relationship	Define customer relationships

Table B – 6 Sales and Marketing Super User (Page 1 of 3)

Menu Name	Navigation Prompt	Function	Description
	Opportunity Management		
	Forecast		Forecast to your management
	Process Mail Response		Process inbound response cards
	Mailings		Submenu to prepare promotional mailings
		Collateral Package	Send collateral package
		Mail Blitz	Define mail blitz
		Letter	Prepare letters
		Collateral	Define collateral pieces and kits
		Collateral Kit	Prepare collateral kit for personal distribution
		Warehouse Merge	Prepare fulfillment letter merge file
		Lists	Define lists
	Events		Submenu for event management / manage promotional events
		Event	Enter event name and description
		Event Offering	Schedule event offering
		Event Facility	Define event facility
		Letters	Create event–related letters
		Event Enrollment	Enroll contacts for event offerings
		Event Merge	Prepare event letter merge files
	Promotions		Submenu for promotional campaigns
		Advertisements	
		Scripts	
		Promotions	
		Copy Promotions	
	Concurrent Reporting		Submenu – Standard report submission and view report for Forms 4.0

Table B – 6 Sales and Marketing Super User (Page 2 of 3)

Menu Name	Navigation Prompt	Function	Description
		Run	Run report
		View	View report
		Set	Request sets (user mode)
	Setup		
		Personal Profile	
		Quick Codes	
		Sales Organization	Submenu for sales organization structure
		Account	Account structure
			Executive job
			Current environment
			Word replacement rules
		Opportunities	
		Interests	
		Promotions	
			Word Processors
			Collateral categories
	Remote		Perform remote options
			Word Processor
			Collateral setup
	Personal Profile		Enter your personal profile options
	Purge		Purge notes

Table B – 6 Sales and Marketing Super User (Page 3 of 3)

Menu Name	Navigation Prompt	Function	Description
AS_TERRITORY_	To Dos		Submenu to manage action items
MANAGER		List	List all To Dos items
		Reassign	Reassign To Dos item to another
	Sales Organization		Submenu to deal with hierarchy
		Sales Force	Define sales force
		Sales Groups	Define sales groups
		Territories	Submenu for territories
			Territory – Listing of territories
			Type – Type of territory
			Groups – Groups associated in territory
			Accesses – Set access privilege
			Qualifiers
			Utilities
		Sales Quotas	Assign sales quotas
		Sales–Related	Identify sales and marketing jobs
		Personnel	Submenu to set up personnel structure
			Organizations (F4 Define Organization)
			Locations (F4 Define Location)
			Jobs (F4 Define Jobs)
			Employees (F4 Enter Employee)
	Find Account		Find account or contact information
	Find Opportunity		Find opportunity information
	Concurrent Reporting		Submenu – Standard report submission and view report for Forms 4.0
		Run	Run report

Table B – 7 Territory Administrator (Page 1 of 2)

Menu Name	Navigation Prompt	Function	Description
		View	View report
		Set	Request sets (user mode)
	Personal Profile		Enter your personal profile options

Table B – 7 Territory Administrator (Page 2 of 2)

Menu Name	Navigation Prompt	Function	Description
AS_SYSTEM_	Security		Submenu for security
ADMINISTRATOR		User	Submenu for Users
			Define Users
			Monitor user participation
		Menu Name	
			Define Menu Name
			Request
			Value Set –submenu Define / Assign
			Terminal – submenu Assign / Group
		Oracle	Submenu for Oracle
			Register
			Data Group
		AuditTrail	Submenu for Audit
			Install
			Groups
			Tables
	Concurrent		Submenu for concurrent processes
		Requests	
		Set	

Table B – 8 System Administrator (Page 1 of 3)

Menu Name	Navigation Prompt	Function	Description
		Manager	Submenu for management
			Administer
			Define
			Workshifts
			Rule
		Program	Submenu for programming
			Define
			Executable
			Types
		Databases	
	Profile		Submenu for profile settings
		System	
		Personal	
	Application		Submenu for application
		Register	
		Function	
		Menu	
		Validation	Submenu for validation
			Set
			Values
		Flexfield	Submenu – See Oracle System documentation
			Key
			Descriptive
			Flexbuilder
		Document	Submenu for documentation
			Define

Table B – 8 System Administrator (Page 2 of 3)

Menu Name	Navigation Prompt	Function	Description
			Categories
			Assign
		Currency	
	Install		
		Information	
		Printer	Submenu for printers
			Register
			Types
			Style
			Driver
		Nodes	
		Terminals	
	Requests		Submenu for concurrent processes
		Requests	
		Set	
		Manager	Submenu for management

Table B – 8   System Administrator (Page 3 of 3)

Menu Name	Navigation Prompt	Function	Description
AS_	Event Letter Merge		Merge event letters
WAREHOUSE_	Fulfillment Letter Merge		Merge fulfillment letters
ADMINISTRATOR	Send Collateral Package		Review collateral package requests

Table B – 9   Warehouse Administrator (Page 1 of 1)

APPENDIX

C

QuickCode Lookup Types

This appendix includes all Oracle Sales and Marketing QuickCode lookup types and any default value furnished with the product. A *No* or *Yes* in the *User Maintained* column indicates whether the value is updatable and viewable at the user level.

Your Setup menu also includes a separate category called *Receivables QuickCodes*. These QuickCodes are differentiated because they are set within Oracle Accounts Receivable. Though, it is necessary to set the Accounts Receivable QuickCodes, the values and settings are not discussed here.

QuickCode Lookup Types

This section includes all Oracle Sales and Marketing QuickCode lookup types and any default value furnished with the product. A *No* or *Yes* in the *User Maintained* column indicates whether the value is updatable and viewable at the user level.

Your Setup menu also includes a separate category called *Receivables QuickCodes*. These QuickCodes are differentiated because they are set within Oracle Accounts Receivable. Though, it is necessary to set the Accounts Receivable QuickCodes, the values and settings are not discussed here.

Lookup Type	Lookup Value	Comments	User Maintained?
Access Privilege	Territory or Full	A user has access to a Territory or access to all territories. Provides LOV for Access Privilege profile option	No
Access Type	Account Account and Lead Lead	LOV for access when defining territory types.	No
Advertisement Status	User created list of values	Suggested values include: C Cancelled P Planned S Scheduled U Unscheduled	Yes
Amount Scaling In	Thousands Millions	LOV for Amount Scaling profile option	No
Astata_Run_Mode	New Restart Total	LOV for Territory concurrent program	No
ASXCSPMR Navigation Fields	Address ID Contact Last Name Contact Number Contact Name Customer Number	These values are options for the Process Mail Response window.	No

Table C – 1 QuickCode Lookup Types (Page 1 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Blitz_Status	Cancelled Complete Scheduled	Not configurable. The application expects one of these values.	No
Blitz_Type	Call Blitz Mail Blitz	Not configurable. The application expects one of these values.	No
Close_Reason	User created list of values	Enter a list of values that are meaningful to your site, such as: C Competition F Functionality P Price	Yes
Collateral Fulfillment Method	FH Fulfillment House N Neither OE Order Entry	LOV for Collateral Fulfillment Method profile option.	No
Collateral Request Status	B Backordered C Completed CA Cancelled E Error I In Process P Pending PS Partial Shipment R Ready RJ Rejected S Shipped	Set at site level in System Profile.	No
Collateral Status	B Backordered I In Stock K Collateral Kit O Obsolete Personal_Kit Public_Kit U Unknown	Set at site level in System Profile.	No
Competitor	User–maintained list of values	Enter a list of competing companies for opportunities	Yes
Contact Degree	User–maintained list of values	Enter a list of possible educational degrees a contact may have earned.	Yes

Table C – 1 QuickCode Lookup Types (Page 2 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Contact Education Type	User–maintained list of values	Enter a list of possible educational types that describe a contact.	Yes
Contact Family Event	User–maintained list of values	Enter a list of contact family events such as birthdays or anniversaries, that you may want to remember.	Yes
Contact Military Branch	User–maintained list of values	Enter contact's military service, if any.	Yes
Contact Relations	User–maintained list of values	Enter all possible family relationships important to your contact knowledge.	Yes
Contact Sport	User–maintained list of values	Enter a list of sports enjoyed by your contacts	Yes
Contact Trait	User–maintained list of values	Enter a list of traits that are important for others to observe when dealing with contact. Examples: Humor No Humor Sharp Soft Spoken	Yes
Date Format	dd mon yyyy day month year month day year	Not configurable. The application expects one of these values.	No
Delivery Method	E Email F Fax FH Fulfillment House M Manual Shipment OE Order Entry	Not configurable.	No
Department Code	User–maintained list of values	Enter a list of department codes. Example: Physics Purchasing Textiles Chemistry IS	Yes

Table C – 1 QuickCode Lookup Types (Page 3 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Environment Application	User–maintained list of values	Enter a list of possible applications contacts may be using. Example: ASK–MANMAN Excel Lotus OE–SAP	Yes
Environment Category	User–maintained list of values	Enter a list of possible categories of applications contacts may be using. Example: Email Finapps Other	Yes
Environment Database	User–maintained list of values	Enter a list of possible databases your contacts are working with. Example: Oracle ASK Informix Ingres Sybase	Yes
Environment Hardware	User–maintained list of values	Enter a list of possible machines your contacts are working on. Example: HP–9000 IBM6000 VAX–6000	Yes
Event Enrollment Status	Attended Cancelled Confirmed Enrolled No Show Waitlisted Walk In	Not configurable. The application expects one of these values.	No
Event Facility Type	User–maintained list of values	Enter a list of event facilities. Example: Convention Center Hotel Inhouse University	Yes

Table C – 1 QuickCode Lookup Types (Page 4 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Event Letter Type	Specified Date Status Change	Not configurable. The application expects one of these values.	No
Event Status	Cancelled Complete Planned Scheduled	Not configurable. The application expects one of these values.	No
Field Validation	Free Text Validate	Let users enter free text or limit to LOV.	No
Flag	Y Flags set N No flags set	Set at Site level through System Profile.	No
Freight Carrier	User–maintained list of values such as: DHL Fedex UPS	Enter the list of freight carriers used at your site.	Yes
Freight Carrier Source	OE Oracle Order Entry OSM Oracle Sales and Marketing	Not configurable. The application expects one of these values.	No
Generate Keys Mode	Address Contact Customer	Argument for Generate Customer Keys concurrent program	No
Interaction Type	Collateral Event Inbound Mail In Response Mail Blitz Outbound Visit	Not configurable. The application expects one of these values.	No

Table C – 1 QuickCode Lookup Types (Page 5 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Interest Status	User–maintained list of values	Status for interest type. Example: Downsizing Evaluating Installed Rejected Upgrading Obsolete	Yes
Interest Use	Company Classification Contact Interest Lead Classification	Not configurable. The application expects one of these values.	No
Issue	User–maintained list of values	Issue related to a lead or opportunity. Example: Performance Price Size Support	Yes
Language	User–maintained list of values–a full list of languages is provided and can be enabled or disabled	Language of the contact.	Yes
Lead Channel	User–maintained list of values	Sales channel for a lead or opportunity.	Yes
Lead Status	Dealer Expired Forecasted Lost No Opportunity Preliminary Upside Won	Not configurable. The application expects one of these values.	No
Letter Template	Event Generic	Not configurable. The application expects one of these values.	No

Table C – 1 QuickCode Lookup Types (Page 6 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
List Type	Account Contact Lead One Time	Not configurable. The application expects one of these values.	No
Media Type	User–maintained list of values such as: EDI Electronic Data I Interchange F Fax NP Newspaper R Radio TV Television	Types of advertisement media.	Yes
Month	01 = January ascending to 12 = December	Numerical values assigned to months	No
Note Source	Account Comment Company Comment System Generated User Entered Note	Not configurable. The application expects one of these values.	No
Notification Type	F Fulfillment Request L Lead	Not configurable. The application expects one of these values.	No
Opportunity Probability Link	Error Warning	Not configurable. The application expects one of these values.	No
Pre–Defined Action Types	CL Create Lead EE Enroll for Event PI Contact Interest SC Send Collateral	Not configurable. The application expects one of these values.	No
Processing Status	CA Cancelled CO Complete I In Process R Ready	Not configurable. The application expects one of these values.	No

Table C – 1 QuickCode Lookup Types (Page 7 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Promotion Status	User maintained list of values such as: Completed Expecting Planning	Enter a list of promotional status.	Yes
Promotion Type	A Advertisement B Blitz C Collateral E Event L Letter P Program S Script	Not configurable. The application expects one of these values.	No
Publication Type	Example: Financial Home Technical	Enter a list of publications in which your advertisements appear, or a source of opportunity.	Yes
Qualifier Format	C Character M Money N Number	Not configurable. The application expects one of these values.	No
Qualifier Type	D Discrete M Template R Range	Not configurable. The application expects one of these values.	No
Rank (Level of importance)	1 Very High 2 High 3 Moderate 4 Low 5 Very Low	Not configurable. The application expects one of these values.	No
Salesforce Relationship	None specified	Enter internal codes or descriptions of business unit relationships your salesforce is likely to have with customers.	No
Salesforce Role	Account Manager	Enter a list of possible responsibilities an employee is likely to have with respect to a given sale.	No

Table C – 1 QuickCode Lookup Types (Page 8 of 9)

Lookup Type	Lookup Value	Comments	User Maintained?
Salesforce Type	Employee Partner	Not configurable. The application expects one of these values.	No
Script Type	C Call M Mail	Not configurable. The application expects one of these values.	No
Time Format	24HR format AM / PM format	Not configurable. The application expects one of these values.	No
Word Replacement Type	Address Customer First Name Key Last Name Name	Not configurable. Choose a first key field for the Customer Key Word replacement program. The application expects one of these values.	No
Worksheet Region	Account Collateral Contact Enter Forecast Note Opportunity To Do View Forecast	This quickcode fills a list of values for the profile option *OSM: Initial Worksheet Region*. That profile determines which worksheet appears on top when file tab windows are arranged in the Telemarketing Workbench window.	No
Blank User–Maintained QuickCode Screen	Undetermined	Not set	Yes

Table C – 1 QuickCode Lookup Types (Page 9 of 9)

APPENDIX

D

OSM – Microsoft Schedule+ Integration

This appendix describes the Oracle Sales and Marketing (OSM) and Microsoft ® Schedule+ integration.

The following topics are included:

Overview of OSM and Schedule+ Integration

Oracle Sales and Marketing supports integration of appointments with Microsoft Schedule+. Synchronization between OSM and Schedule+ is performed for all To Dos activities with a valid start and end time. If either the start date or end date is null, then the To Dos is assumed to be a task and is not inserted in Microsoft Schedule+.

▶ **To activate the integration between OSM and Schedule+, the following OSM profile must be turned on**:

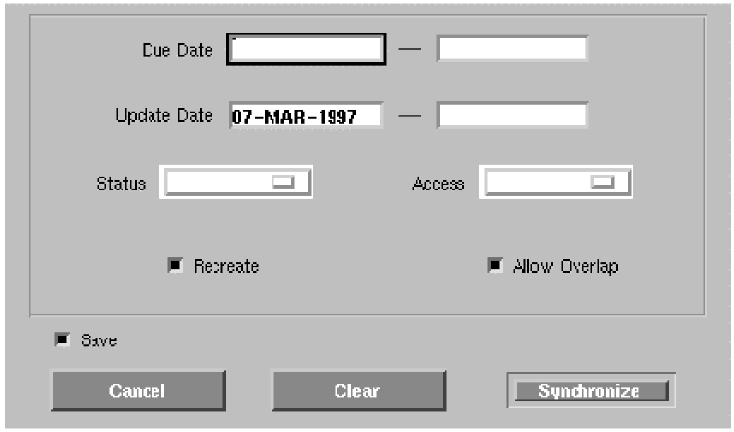
- *OSM: Enable MS Schedule+ Integration*.

  This profile can be set to YES or NO at the site or user–level.

Note: When the Schedule+ integration is turned on, the initial insert into Activities may be a bit slow as the OLE server needs to be activated.

General Behavior

When a new item is created in Oracle Sales and Marketing, a corresponding item is created in Schedule+. Any changes to this item (including delete) will be reflected in the corresponding item in Schedule+. If Schedule+ is not properly installed or the user's Schedule+ access permission is not correct, an error message is generated, but the insert/update/delete of the activity will still go through in Oracle Sales and Marketing. Any errors in the synchronization of a single Oracle Sales and Marketing To Dos are corrected later when the user performs the mass synchronization between Oracle Sales and Marketing and Schedule+, assuming that the setup issues with have been fixed by the user.



▶ **To perform a synchronization of your To Dos appointments with Schedule+:**

1. Choose the Schedule+ button on the To Dos Detail window.

   A model synchronize window will appear.

2. Choose the appropriate criteria to limit the number of records that are synchronized. There are four possible choices:

   Due Date: Date range

   (Last) Update Date: Date range

   Status: Closed, open, don't care

   - *Access:* Personal, public, don't care.

3. Choose the appropriate check box to help control the synchronization process. There are three possible choices:

   Save: If this check box is checked, the last synchronize criteria is saved in the database. The criteria saved becomes the default for the next synchronization process you perform.

   Recreate: If this box is checked and if an item existing in both OSM and Schedule+ is deleted from one place, the item will be recreated during synchronization. If it is unchecked, the item is deleted from whichever place it remains.

   Allow Overlap: This check box controls the creation of overlapping schedules. If it is unchecked, any new record in Oracle Sales and Marketing that overlaps with an item in Schedule+ will be ignored (and vice versa).

Attention: If an appointment, which exists in both Oracle Sales and Marketing and Schedule+, is later converted into a task in Oracle Sales and Marketing (i.e., one or both, the time fields are set to null); then the corresponding Schedule+ item is deleted.

Schedule+ Considerations

The Schedule+ integration can be used in shared mode as well as single–user mode. The email address of the employee stored in the HR database (in the per_people_f email_address field) should be the same as the username for the Schedule+ user. Whether working in single–user mode or shared mode, Schedule+ asks for a username.

When you are running in single–user mode, only To Dos assigned to yourself will be exported to schedule plus. To add To Dos assigned to you but created by another user into schedule plus, you will need to run the Oracle Sales and Marketing – Schedule+ synchronization.

In the group mode, a centralized Microsoft mailbox must be setup and all the shared schedules must reside on this mailbox. The usernames for the mailbox should be exactly the same as the email address stored in HR database. If a person (such as a manager) wants to assign To Dos to other employees, they must be granted access to their schedules (this can be done by the employee in Schedule+).

When the schedules are shared, a person can mark their schedule items as *private*. In this case, others can only see the start and end time of the private schedule, not the contents.

Glossary

access privilege A privilege granted to an employee by the system administrator that determines whether the employee has full access to all accounts and leads in the system (**Full Access** can query and update any account or lead), or whether the employee's access rights to accounts and leads are defined by sales territory (**Territory Access** can query and update only the accounts and leads that fall within the employee's territories).

access type An attribute of a sales territory that determines the type of access the employee has to accounts and leads falling in the territory. **Account Access** gives an employee access to an account and its associated contacts, but not to any associated leads. **Lead Access** gives an employee access to a lead as well as to its associated account and contact information, but not to any other leads for the account, unless they too, fall into the employee's territory. **Account and Leads Access** gives an employee access to an account, its associated contacts, and all its associated leads.

access record A record stored in the database that grants an employee access to a specific account or lead. OSM automatically creates access records based on the sales territories defined for your enterprise. You can also create access records manually, if you want to give an employee access to an account or lead that is outside the employee's sales territory.

account A customer or prospect at an address.

account code A system generated number that uniquely identifies an account.

account comment A special note that displays in the Account Detail window and in the header of the Notes and Opportunities windows for this account. Use account comment to record critical information that should not be lost among the other date–sorted notes.

address A physical location for a customer or a contact.

advertisement A marketing notice placed in a print or broadcast medium.

agreement An arrangement with a customer that sets business terms for sales orders in advance. Oracle Order Entry lets you assign pricing, accounting, invoicing, and payment terms to an agreement.

alternative region Segments of a window devoted to an operation are called alternative regions. You select an alternative region from a pull down menu in the window.

amounts and credits The Amounts and Credits alternative region in Dossier displays the total dollar value of a product. The Total Product Value is the Total Product List Value less the Total Product Discount Value. The Total Order Value is the Total Product Value plus the Total Service Value. The Total Commitment Value is the dollar value of a contractual guarantee, with a customer, for future purchases.

bill to The address of the customer who is to receive an invoice. Equivalent to Invoice To Address in Oracle Order Entry.

blitz An outbound fax, mail, or telephone marketing campaign directed towards a target list of suspects and contacts.

booked date The date that an order is booked, signifying that the order is firm and includes all the information necessary to be processed through its order cycle.

category A classification of collateral. You group collateral items into categories. The same collateral item can appear in more than one category.

classification A classification of the type of business area an account or opportunity is interested in. This can be anything such as a type of product, a technology, or a business sector. Classifications are created for you by your system administrator.

close date The date by which you expect your prospect to make a purchase decision. Close Date determines which period an opportunity is forecasted for.

close reason The reason an opportunity is no longer active. An opportunity closes because it turns into a sale, is lost to a competitor, or is not a viable.

code A unique identifying number used anywhere a unique identifier is required, for example, event code, advertisement code, letter code, etc. Your system administrator determines if code is user or system generated.

collateral A piece of material that you can send to a contact, ranging from a simple information leaflet to a glossy brochure or computer demo diskette. You organize collateral into categories.

collateral item See collateral.

collateral kit A collection of collateral pieces that you define and send out as a single package.

collateral piece See collateral

company A company represents an enterprise with whom you are conducting business, such as a corporation, a school district, or a city.

company comment A special note that displays in the Account Detail window for all accounts, notes, and opportunities of this company. Use this note to record critical information that should not be lost among the other date–sorted notes.

company number A system generated number that uniquely identifies a customer or prospect.

competitor A company that competes with your enterprise.

contact An individual that works for an account. You can perform many functions for a contact such as sending collateral, enrolling for an event, tracking responses, and creating action items. A contact can also have a private mailing address different from the account address.

customer A company that, at some time, has placed an order with your enterprise.

decision maker A contact having authority to make purchase decisions.

descriptive flexfield A feature you use to collect information unique to your business. You determine the additional information you need and Descriptive Flexfield lets you customize your application to your needs without additional programming.

discount A reduction of the list price of an item.

do not mail A check box indicating to exclude this account or contact from promotional mailings.

dossier A set of windows including Find Customer Orders, Customer Order Summary, Customer Order Line Summary, and Customer Order, that let you search for and view the order history for a customer.

drill down A term referring to clicking on an item within a window to open a submenu or submenus.

expected purchases Products or services you expect to sell with this opportunity.

event A promotional event, such as a trade show, seminar, or training session having a predetermined time, date, and location, and optionally a list of registered guests.

file name The name of the file on the word processor that your form letter is stored under. The file name must adhere to the file naming conventions of the word processor.

form letter A document that you write using a word processor with the intention of personalizing it by inserting database information at places that you mark with tokens.

full write A check box that when checked, extends full update privileges to a team member. Anyone having full write privilege can update the privilege for another person. Full Write privilege permits the person to update any information on an opportunity. Without it, a person cannot update or add any information to a Sales Team, or modify information in the Close Information, or Forecast Information alternative regions of the Opportunity window other than his/her own quota amounts.

fuzzy find A feature you use to search for a name, address or account for which you are not sure of the exact spelling or wording. Fuzzy find follows a prescribed set of rules to accomplish its search.

interaction An instance of communication with a contact. An interaction can occur as a result of a marketing program. An interaction can be one of the following types: Inbound Phone Call, Outbound Phone Call, Mailed–In Response, or Visit.

interest See interest type.

interest code A code created by your system administrator for an item or business area that you use to track account, contact, and opportunity interests. Each primary code can have secondary codes, so that you can break your account and contact interests down. For example, you might have one product that is available in more than one version or model. You can create a primary interest code for the product itself and then link it to a number of secondary codes representing the different versions or models.

interest type A classification of the type of business area a contact is interested in. This can be anything such as a type of product, a technology, or a business sector. Interest types are created for you by your system administrator.

invoice to See **bill to.**

key account An account you work with frequently. By checking the Prefer Key Account check box in the Find Account or Contact window you can instruct Fuzzy Find to search through only your key accounts. Use the Key Account check box in the Account Detail window to designate an account as one of your key accounts.

label uniquely identifies each script answer across all sequence numbers. For example, if question 1 has three possible responses: A, B, and C then the labels for question 2 cannot also be A, B, and C.

lead See opportunity

letter A letter you send independently or with a collateral fulfillment or mail blitz package. A letter can be created using predefined mail merge tokens representing account, contact, or event information.

letter code token Each letter must contain the Letter Code token so Word can match the form letter with the merge file when you perform the actual mail merge. You can put this token anywhere in the letter, for example, near the bottom margin. If the token is missing the mail merge does not function correctly.

list price A standard item cost charged to a customer for your product.

location A code that uniquely identifies an address and its usage.

mail merge A feature of word processing software that lets you personalize a form letter. In general, two files are involved: a *form letter* containing both the text that remains the same and tokens representing information to be personalized and a *merge file* containing database information that replaces the tokens, such as a company name or a contact's name and address.

merge file An operating system file that contains information pulled from the database, for merging into the text of a form letter to personalize it. For example, a merge file might contain name and address information for 15 contacts. When merged into the text of a form letter, it produces 15 personalized letters.

note A piece of information about a lead, account, or contact. A note is either entered by you or generated automatically to record the occurrence of a specific situation such as the receipt of a telephone call from a contact.

opportunity A qualified sales opportunity with the potential to bring in revenue. An opportunity has a life span and it eventually closes either because it turns into a sale, is lost to a competitor, or is a bad opportunity. An opportunity is assigned to one or more territories based on a variety of criteria and may be worked on by a single sales representative, by a team of employees, or by a sales partner.

order line number A number that uniquely identifies a specific line of a sales order.

order number A number that uniquely identifies a sales order.

order type A classification of a sales order.

overlap allowed A check box within the Territory Types window that indicates whether qualifier values can overlap between territory types. For example, if values assigned to the qualifier *Postal Code Range* can overlap, then one value could be 94400 – 94410 and another value could be 94408 – 94420. If overlap is not allowed you cannot assign a qualifier value to a territory if the value overlaps an existing value for a territory under the same type.

partner A company acting on behalf of your enterprise that helps close business for you by selling your products.

primary code See interest code.

private mailing address An address for a contact that is used for mailing purposes only. Each contact can have a private mailing address different from the account address with which the contact is linked.

product agreement See **agreement**.

program A series of marketing promotions that together make up a larger marketing effort. For example, a product launch program might involve one or more advertisements, blitzes, and events.

prospect A company that has not yet placed a purchase order with your enterprise.

public makes a file available for public use. When a file is public, all users have access to it. Public allows read and write access to all; allowing others to modify the file to their own purposes.

purchase order (PO) A document used to buy and request delivery of goods or services from a vendor.

quantity The number of items ordered on a sales order line.

quota credit For an expected purchase, the amount that you can count as credit towards quota. If you enter a value here, the system automatically calculates the Quota Percent.

quota percent For an expected purchase, the percentage of the amount that you can claim as credit towards your quota. If you enter a value here, the system automatically calculates the Quota Credit.

reference number The unique identifying number for an opportunity.

responses expected The number of responses you expect from the target reach area.

revenue percent For an expected purchase, the percentage of the amount that you can roll upwards on a revenue forecast. If you enter a value here, the system automatically calculates the Revenue Amount.

rollup territory A territory without rank or group that represents a region. Your rollup territories can be customer–based, geographically–based, product–based or any combination of these and other factors. Each rollup territory is of a particular territory type and is defined by a set of territory values.

revenue amount For an expected purchase, each item, the amount you can roll upwards on a revenue forecast.

sales channel A method used to generate a sales order, such as telemarketing, direct marketing or sales partner.

sales group A sales organization within your enterprise that has a manager.

sales partner A company acting on behalf of your enterprise helping close business for you by selling your products. Examples of sales partners are reseller or dealer.

sales rep A sales representative or salesperson.

sales rep territory A sales area that you assign to an employee or team. Your sales rep territories can be customer–based, geographically–based, product–based or any combination of these and other factors. You can also base a sales rep territory on any number of rollup territories such that the sales rep territory automatically inherits the qualifier values of the rollup territories. Each sales rep territory is of a particular territory type within a particular territory group, and has a rank.

sales stage A defined step in the sales cycle. Your enterprise's implementation team defines permissible values based on the sales methodology employed by your sales organization.

script A predetermined series of questions for use during telephone calls with contacts, to mimic the questions on mail–in response cards, or to record a contact's evaluation of an event. You can predefine answers for each question and you can assign actions for the system to automatically perform when a contact gives a specific answer.

secondary code See interest code.

selling price List price less any discounts.

sequence A number identifying the question text. Within an individual script the sequence must be unique for each question.

question text The question text as you want it to be read during a telephone conversation, or for mail response scripts, the question as printed on the response card.

setup path The setup path for the word processor is shown by selecting Word Processors from the Promotions menu in the Navigator. A list of all available word processors is available. The correct path to the Word 6.0 application is: C:\msoffice\winword\winword.exe

ship to The address of the customer who is to receive products listed on the invoice or order.

status Indicates the availability of a collateral item. Possible values are: Back Ordered, Collateral Kit, In Stock, Obsolete, or Unknown. A collateral kit is a set of collateral items that are frequently sent together. The Status field is manually maintained. If your site does not want to update this field your system administrator may choose to set Status to Unknown.

target reach The number of contacts or prospects you expect to reach over the course of the promotion.

template A sample form letter, containing tokens specific to Sales and Marketing, that you can use to create your own form letters.

territory An artificial aggregation of accounts, contacts, or leads.

territory group A territory group is a set of territory types that compete with each other when assigning leads and accounts to employees by territory. For a particular lead or account, access is granted to the employees whose territories rank highest within each territory group.

territory qualifier A territory qualifier defines the type of values that you can assign to a territory. Postal Code Range, Customer Name, and Contact Interest are examples of territory qualifiers. OSM pre–defines all territory qualifiers.

territory type A territory type is defined by one or more territory qualifiers and includes a rank that shows the importance of the territory type compared to other territory types within the same group when assigning leads and accounts to employees by territory.

territory value A value that describes a territory. Each territory value represents a specific territory qualifier for a particular territory. For example, territory values for the territory qualifier Area Code might be '415', '408', '617,' and so on.

to do item An action to be performed. The action can be a work–related task, or personal. If work, it can relate to an account, contact, or lead.

to do list A set of actions related to an account, contact, or lead, or a set of personal to do items to be completed within a time period.

token A named marker that you insert into the text of a form letter with the intention that Sales and Marketing substitute the appropriate database value at the time the letter is prepared for a specific person. Examples of tokens include: First Name, Last Name, Address, Event Name, Date, and so on.

total product value The total product list value less the total product discount value.

total order value The total product value plus the total service value.

total commitment value The dollar value of a contractual guarantee, with a customer, for future purchases.

usage The purpose of an address, such as *Bill To* or *Ship To.*

use for reference A check box that indicates whether an account or contact is trusted enough to act as a reference to other prospects.

win probability The likelihood that the opportunity can close as a win by the expected close date. Your implementation team determines permissible values. Win Probability can be linked to Status so that Status automatically updates when Win Probability changes.

word processor An application software package, such as Microsoft® Word for Windows or WordPerfect® that is external to Sales and Marketing and that you use for creating, editing, printing, and viewing form letters. You can personalize letters to contacts by using the mail merge feature of the word processor to combine the form letter with a merge file created by Sales and Marketing.

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