Oracle® Sales Online

Implementation Guide

Release 11*i*

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Oracle Sales Online Implementation Guide, Release 11*i*

Part No. A87352-01

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Oracle Sales Online Implementation Guide Release 11*i*

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- Did you find any errors?
- Is the information clearly presented?
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Preface

This Implementation Guide provides information and instructions to help you implement Oracle Sales Online, Release 11*i*.

This preface explains how the guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide describes how to set up and configure Oracle Sales Online. The intended audience includes system administrators and Oracle implementation consultants. This is not meant to be a user's guide.

Related Documentation and Resources

The following documents provide additional information on installing and implementing Oracle CRM products.

Reference Documentation

Installing Oracle Applications, Release 11i (A69409-02)

This manual documents the Rapid Install installation process.

Oracle Applications Concepts (A82932-01)

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*.

Oracle Applications Flexfield Guide (A75393-01)

This guide contains information about using Oracle Flexfield features. It also offers flexfield implementation suggestions.

Oracle Applications Product Update Notes, Release 11i (A85297-01)

This document contains information about new product features and functions for various Oracle applications.

Oracle Applications System Administrator's Guide (A75396-01)

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

Oracle Applications User's Guide (A75394-01)

This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11*i*.

Additional Product-Related Documentation

Implementing CRM Applications (A85301-01)

This document provides instructions for completing installation of Oracle Customer Relationship Management (CRM) products.

Implementing Oracle HRMS (A73313-01)

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide (A86122-01)

This guide describes set up and configuration tasks for all the foundation components.

Oracle CRM Foundation Technical Reference Manual (A86150-01)

This manual contains table and view descriptions for all the Oracle CRM foundation components.

Oracle Inventory User's Guide (A83507-01)

This guide contains information about product features and functions for Oracle Inventory.

Oracle Marketing Concepts and Procedures (A83622-01)

This document is a printed compilation of the Oracle Marketing online help system, including implementation information.

Oracle Marketing Encyclopedia Concepts and Procedures (A83637-01)

This document is a printed compilation of the Oracle Marketing Encyclopedia online help system.

Oracle Order Capture Concepts and Procedures (A86136-01)

This document is a printed compilation of the Oracle Order Capture online help system.

Oracle Sales Compensation Implementation Guide (A86178-01)

This guide describes set up and configuration tasks required to implement Oracle Sales Compensation.

Oracle Sales Online Technical Reference Manual (A86175-01)

This manual contains table and view descriptions for Oracle Sales Online.

Implementing Oracle Sales Online

Overview of Oracle Sales Online

Oracle Sales Online is an HTML-based application for use by field sales representatives, distributors, resellers, and sales executives.The Oracle Sales Online web architecture enables global deployment, painless upgrades for remote users, and easy customization.

Functionality

Oracle Sales Online functionality includes the following:

Customer and Contact Management

Oracle Sales Online provides representatives with a complete customer overview at each stage of the sales process, in both Business to Business and Business to Customer environments. Before contacting a customer, a sales representative can review customer information including: products installed, outstanding service requests, payment history, key contacts, open opportunities, and specific sales team members assigned to the customer account. Comprehensive customer information allows sales representatives to better manage their customer accounts and to plan each customer interaction more efficiently.

Opportunity Management

Account managers, sales managers, and territory managers can use Oracle Sales Online to analyze their pipelines. Oracle Sales Online can be used to obtain real time reports for any prospect, sales representative, or sales group by sales channel, sales status, and sales stage.

Opportunity Forecasting

Salespeople can create and revise forecasts at the deal level. Executives can create their own views of their sales representatives' forecasted opportunities and can also track forecast adjustment histories.

Multi-Currency Support

Oracle Sales Online provides support for international sales teams with transactions involving multiple currencies. Salespeople can create and view their opportunities, forecasts, and reports in both the transaction currency as well as the user base currency.

Global Forecasting Report

Oracle Sales Online consolidates divisional forecasts with multiple currencies to provide sales executives with a more extensive, global view of their company revenue forecasts. Senior executives are able to view global roll-ups of sales forecasts across geographic regions, currencies, sales organizations, and product lines. Oracle Sales Online also allows sales executives to drill down from a global forecast to the detail level of deals and opportunities in the local currency.

Attachments

Oracle Sales Online users can create file attachments and link them to customers, opportunities, sites, tasks, etc. All standard file formats are supported. By selecting and clicking on an attachment, users can launch corresponding applications automatically.

Performance Measurements

Integration with Oracle Sales Compensation enables Oracle Sales Online to align salesforce behavior with business goals and imperatives.

Sales representatives can view their compensation summary and break down their commissions by deal, product line, period, adjustments, and transactions.

Custom Fields

Oracle Sales Online provides additional implementation flexibility by allowing organizations to define custom fields on their screens and track business-critical data.

New in this Release

The following new features have been added to Oracle Sales Online in this release.

Enhanced User Interface

Oracle Sales Online takes advantage of new HTML standards to provide salespeople with a more interactive user interface over the internet. This interface is designed to give users easy access to key information while minimizing the number of drill downs, screens, and keystrokes necessary to perform business functions.

Personalization

Sales professionals can personalize the application in many ways through an intuitive profile screen. The user can customize the home page to display relevant information such as news, important sales metrics, etc. The user can customize various table views, and choose display and sorting options. Additionally, the user can select the language, currency, date formats and other display options through the same profile screens. Frequently used queries can also be easily set up and saved for future use.

Customer Relationship Manager

This release of Oracle Sales Online takes advantage of the new customer model which is shared by all Oracle applications. The user has the ability to create and manage complex relationships (such as partners, subsidiaries, competitors, clubs, etc.) among multiple parties and maintain these relationships as they change.

Globalization

Users can now select language and date formats, as well as preferred base currency.

Tasks and Interactions

Users can create and assign tasks to themselves or other team members. Tasks are organized in a work queue and can be sorted by priority, due date, status, etc. Oracle Sales Online users have visibility into all customer touch points through integration with the Oracle E-Business suite of applications and can view interactions performed by other systems and/or individuals.

Collateral Fulfillment

Through integration with the Oracle CRM Foundation 1-to-1 Fulfillment component, users can send collateral to their contacts and/or prospects.

Quota Planning and Distribution

Through integration with Oracle Sales Compensation, sales managers and executives can plan and distribute quotas to different sales groups and/or professionals through a simple HTML interface.

Enhanced Territory Management

Oracle Sales Online takes advantage of the enhanced Territory Management module. Users can define flexible territories where qualifiers can be defined using any attribute related to the customers and/or opportunities.

Marketing Encyclopedia Integration

Through integration with the Oracle Marketing Encyclopedia System, sales and marketing professionals can organize corporate information into categories and channels for use by the sales force. Marketing Encyclopedia System users can set up groups to swiftly publish content to the appropriate users.

Application Architecture

The application architecture for Oracle Sales Online is as follows:

Technology Stack

Oracle Forms Designer, version 6.0.8.8.0

Oracle 8 Enterprise Edition Release, version 8.1.6

Oracle Reports Designer, version 6.0.8.8.3

Oracle WebDB, version 2.2.2.1

Apache version, version 1.3.9

Java Developer Kit Server Side, version 1.1.6

Dependencies

Oracle Sales Online requires the following related products and components to be installed and implemented:

- Oracle CRM Foundation Components (Resource Manager, Task Manager, Notes)
- Oracle Sales

Related Products and Components

Oracle Sales Online provides functional integration with the following Oracle applications:

- Oracle ERP applications (HRMS, Inventory, Order Entry, Accounts Receivable)
- Oracle CRM Foundation Components (Interaction History, Territory Manager, 1-to-1 Fulfillment)
- Oracle Marketing
- Oracle Marketing Encyclopedia
- Oracle Partners Online
- Oracle Sales Compensation
- Oracle Service
- Oracle TeleSales

Setting Up Oracle Sales Online

Overview

The following sections of this document describe the steps necessary to implement Oracle Sales Online.

Implementation Steps

The table below summarizes the necessary steps to successfully implement Oracle Online. Further information detailing the implementation procedures is provided in the sections following the table.

Prerequisites

Completion of installation and implementation steps as outlined in the following documents:

- *Oracle System Administrator's Guide (A75396-01)*
- *Implementing CRM Applications Release 11i (A85301-01)*

User creation and assignment of Oracle Sales Administration, Order Management Super User, System Administrator responsibilities.

Steps

Mandatory	Step Number	Oracle Sales Online Implementation Steps
❏ Yes	❏ Step 1	Create employee in HR Reference: *Implementing Oracle HRMS (A73313-01)*
❏ Yes	❏ Step 2	Define users and assign responsibilities. (Switch to System Administrator responsibility to perform this step.) Reference: *Oracle Applications System Administrator User's Guide*
❏ Yes	❏ Step 3	In Resource Manager: **a.** Define Resource Groups **b.** Import Employees **c.** Create Resources and Assign Roles **d.** Assign Resources to Group Source: *Implementing Oracle CRM Foundation, Resources*
❏ Yes	❏ Step 4	Create Locations and Organizations Source: *Implementing Oracle HRMS (A73313-01)*

Mandatory	Step Number	Oracle Sales Online Implementation Steps
❑ Yes (steps 5 h, i, j are optional)	❑ Step 5	Set up Opportunity and Forecasting: **a.** Status **b.** Win Probability **c.** Stages **d.** Calendar **e.** Define Credit Types (Switch to Order Management responsibility for this step) **f.** Interest Types **g.** Interest Codes **h.** Plan Element Mapping **i.** Define Inventory Structures **j.** Category Set Mapping **k.** Currencies **l.** Forecast Category Mapping
❑ Yes	❑ Step 6	Lookups
❑ Yes	❑ Step 7	System Profile Options
❑ Yes	❑ Step 8	Set up Note Types and map to source Reference: *Implementing Oracle CRM Foundation, Notes*
❑ Optional	❑ Step 9	Set up Territory Management Reference: *Implementing Oracle CRM Foundation, Territories*
❑ Yes	❑ Step 10	Set up Task Manager (types, status, priorities) Reference: *Implementing Oracle CRM Foundation, Task Manager*
❑ Optional	❑ Step 11	Set up Interaction History Reference: *Implementing Oracle CRM Foundation, Interaction History*
❑ Optional	❑ Step 12	Set up Marketing Encyclopedia Source: *Oracle Marketing Encyclopedia Concept and Procedures*

Mandatory	Step Number	Oracle Sales Online Implementation Steps
❏ Optional	❏ Step 13	Set up Marketing Campaigns Reference: *Implementing Oracle Marketing*
❏ Optional	❏ Step 14	Set up Fulfillment Reference: *Implementing Oracle CRM Foundation, 1-to-1 Fulfillment*
❏ Optional	❏ Step 15	Set up Opportunity Exchange
❏ Mandatory	❏ Step 16	Run Concurrent Programs

Step 1: Creating an Employee in Oracle HRMS

This step must be performed by a user with HRMS Manager responsibility. The user must be defined as an employee/user in Oracle HRMS.

Reference: *Managing People Using Oracle HRMS Release 11i*, Chapter 1 - Employee Management, Special Information Types, Entering and Maintaining a New Person.

Step 2: Define Users and Assign Responsibilities

This step must be performed by a user with System Administrator responsibility.

In this step, you will create an Oracle Applications user and associate the user to the HRMS employee defined. Then you will give the user the responsibility of Oracle Sales Online User, Sales Online Manager, Oracle Sales Administrator, or any responsibility that has access to Oracle Sales Online.

Reference: *Oracle Applications System Administrator's Guide*, Managing Oracle Applications Security, Users Window, Responsibilities Block

Step 3: Creating, Modifying, and Importing Resources

Follow the general guidelines as outlined in *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*. Tasks and tips specific to implementation for Oracle Sales Online are provided below.

3a) Define Resource Groups

1. Under the Oracle Sales Administrator responsibility, choose **CRM Foundation > Resource Manager >Maintain Resources > Groups**

The Define Groups window appears.

2. To find an existing resource group:
   a. Click **Find** on the application toolbar to open the Find Group window.
   b. Select a group name from the list of values in the Group Name field and click **Find.** The application populates the Results section with the group name search results.
   c. Select a group name in the Results table and click **OK**. The application populates the Define Groups window with the group information.
3. To create a new group:
   a. Enter a group name in the Group Name field.
   b. Enter a brief description of the group in the Group Description field.
   c. Enter the effective dates for the group in the **Start** and **End** fields.
4. Use the Relations tab to relate Parent Groups.
5. Save your work when finished.

Note: Group usages must be "Sales & Telesales" or the user will not be able to log in.

It is easiest to build the hierarchy from the bottom up.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager, Defining Resource Groups.

3b) Import Resources

1. Under the Oracle Sales Administrator responsibility, choose **CRM Foundation > Resource Manager >Maintain Resources > Import Resources**

   The Selection Criteria window appears.
2. "Employee" should be the entry in the **Resource Category** field.
3. When importing a single employee, choose to find employees by name, otherwise use job title, competency or other criteria to find resources.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager

3c) Create and Modify Resources

1. Under the Oracle Sales Administrator responsibility, choose **CRM Foundation > Resource Manager >Maintain Resources**

   The Roles window appears.

2. Select from the list of values in the **Category** field.
3. Optionally, select from the list of values in the **Transaction Number** and **Name** fields.
4. Enter the required dates for the resource in the **Start Date** and **End Date** fields and click **Find**.
5. The Resource Search results window opens
6. Select the desired resource and click **Resource Details** to open the Resource window.
7. In the Roles tab, assign a Role with a role type of Sales. Role type must be Sales or the user will not be able to log into Oracle Sales Online.
8. Save your work when finished.

Note: Sales managers need to have Sales roles. Seeded roles include Sales Representative and Sale Manager. Additional Sales roles can be created but the seeded roles are tied to specific Oracle Online Sales functionality. Use of the seeded roles is recommended.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager

3d) Assign Resources to Groups

1. Under the Oracle Sales Administrator responsibility, choose **CRM Foundation > Resource Manager >Maintain Resources**

   The Roles window appears.

2. Select from the list of values in the **Category** field.
3. Enter the required dates for the resource in the **Start Date** and **End Date** fields and click **Find**.
4. The Resource Search results window opens
5. Select the desired resource and click **Resource Details** to open the Resource window.

6. In the Groups tab, assign the resource to a group.
7. Save your work when finished.

Note that a resource can be in multiple groups. This is supported in Oracle Sales Online's Opportunity and Forecasting module.

If a manager has his or her own opportunities, then he or she should be both a manager and a member of the group. This is accomplished by:

1. Giving the manager resource both the Sales Manager and the Sales Representative roles
2. Adding the manager to the group once and assigning both Sales Manager and Sales Representative roles for that group.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i,* Using Resource Manager

Step 4: Create Locations and Organizations

This step is part of multi-org setup. Employees are assigned to organizations and users are tied to responsibilities that are specific to their organization.

Reference: *Implementing Oracle HRMS (A73313-01)*

Step 5: Setting Up Opportunity and Forecasting Administration

Sales representatives can categorize opportunity purchases using three variables.

- Sales Status is a user-defined and modifiable classification required for forecasting roll-ups. This classification can be user-defined. Statuses can be defined as open or closed. If the status is closed, it can be further defined as won or lost. Status can also be flagged as forecastable.
- Win Probabilities: the percentage chance that a particular purchase will be won. This is a user-modifiable classification which defaults to ten win probabilities in ten percentage increments, from 0 to 100.
- Sales Stages is a user defined and modifiable classification starting with the initial contact with a customer through to the sale.

System Profiles for Categorizing Opportunities

Opportunity and Forecasting classifications are governed by the following profiles (See Step 6: Setting Profile Options for more information):

Opportunity Profiles

- **ASO: Product Organization**: Org id used in displayed inventory items
- **OSO: Enable Lead Share:** Display Lead Share button
- **OS: Inventory Category Integration**: Flag to populate Inventory categories in Oracle Sales
- **OS: Compensation Sales Credit Type**: Compensation Sales Credit Type
- **OS: Customer Address Required for Opportunity and Sales Lead:** Customer address required for opportunity.
- **OS: Default Close Date Days**: Default Opportunity Close Date days
- **OS: Default Opportunity Sales Stage**: Default Sales Stage
- **OS: Default Opportunity Status**: Default Opportunity Status
- **OS: Default Opportunity Win Probability**: Default Opportunity Win Probability
- **OS: Default Sales Channel**: Default Sales Channel
- **OS: Generate Opportunity System Notes**: Determines whether or not notes are generated when parts of the opportunity change.
- **OS: Maximum Roll Days for Converting Amount**: Maximum Roll Days for Converting Amount if no conversion rate for a day.
- **OS: No Opportunity Ceiling**: Levels above which the opportunity status cannot be changed.
- **OSO: Opportunity Delete Ceiling**: Level above which a probability can no longer be deleted. No default is set.
- **OSO: Opportunity Probability Link**: Determines whether a warning or an error is given if the win probability amount does not fall within the sales stage probabilities. The warning is turned on by default.
- **OS: Opportunity Sales Credit Enforced Sales Team Definition**: Opportunity Sales Credit Enforced Sales Team Definition

- **OS: Opportunity Status Override**: Determines whether or not the opportunity status can be changed.
- **OS: Sales Methodology**: Sales methodology
- **OS: Sales Team Creator Keep Flag**: Default keep flag for sales team creator.
- **OS: Forecast Sales Credit Type**: Forecast Credit Type for Opportunity Sales Credits
- **OS: Daily Conversion Type**: Currency conversion type used for daily conversion rates.

Forecasting Profiles

- **OSO: Default Forecast Currency**
- **OSO: Default Forecast Period Type**
- **OSO: Default Forecast Worksheet Lines**
- **OSO: Display Subordinate Current Pipeline**
- **OSO: Display Opportunity Worksheet Grand Totals**
- **OSO: Forecast Calendar Month**
- **OS: Date Mapping Type of a Period for Pseudo Period Rates**: Indicates whether the first or last date of the period is used for calculating pseudo period rates.
- **OS: Forecast Calendar**: The name of the calendar being used to manage forecasts.
- **OS: Forecast Currency Code**: Currency used to sum up forecast total amounts.

5a) Opportunity Status

There is a set of predefined statuses included with the application. You may choose not to use the predefined set and create customized statuses of your own. Or, you can use both the predefined set and additional customized statuses.

The following statuses are predefined:

- Active
- Inactive
- Lost

- Won
- Forecast
- No Opportunity
- Dealer
- Expired
- Preliminary
- Upside
- New Opportunity

Use the following procedure to define Opportunity Status.

Steps

1. Under the Sales Administrator responsibility, choose **Oracle Sales Set up > Opportunity > Status**
2. Enter the status code meaning and description for the status. The meaning is displayed on the user interface.
3. The Open checkbox is used to signify whether the opportunity is open or closed. If the checkbox is selected, it means that the opportunity is open.
4. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox in the Used For region. Oracle Sales Online does not currently support Sales Leads.
5. The Win Loss Indicator region indicates whether the deal has been won, lost, or closed. If the open flag is unchecked, then the choices are won, lost, or neither.
6. Select the Used in Forecast checkbox in order to be able to include the opportunity in the forecast.
7. Select the Enabled checkbox to activate the opportunity status.
8. Save your work.

5b) Modifying Win Probabilities

Win probabilities are used to calculate weighted pipeline amounts (opportunity amount multiplied by win probability).

There is a set of predefined Win Probabilities included with the application. You may choose not to use the predefined set and create customized win probabilities of your own. Or, you can use both the predefined set and additional customized Win Probabilities.

Use the following procedure to define or modify Win Probabilities.

Steps

1. Choose **Oracle Sales Setup > Opportunities > Win Probabilities** under the Oracle Sales Administrator responsibility.

   The Define Win Probabilities Window appears.

2. To enter a new probability:

   a. Click in a **Win Probability** field in a new row.

   b. Enter a Value between 0 and 100.

3. Enter or change the information in the **Meaning** and **Opportunity Status** fields.

   If the profile "OS: Opportunity Status Override" is set to yes, then changing the win probability will set the status accordingly.

4. Enter a start date in the **From** field. An entry in this field is mandatory.

5. Optionally, enter an end date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.

6. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Win probability will be displayed on the Partners Online screen, the Oracle Sales screen, or both. The default entry is All.

7. Click the Enabled checkbox to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user's interface.

8. Save your work.

5c) Sales Stages

There is a set of predefined Sales Stages included with the application. You may choose not to use the predefined set and create customized Sales Stages of your own. Or, you can use both the predefined set and additional customized Sales Stages.

Use the following procedure to define or modify Sales Stages.

Steps

1. Choose **Oracle Sales Setup > Opportunities > Sales Stages** under the Oracle Sales Administrator responsibility.

   The Sales Stages Window appears.

2. To enter a new Sales Stage:

   a. Click in a **Name** field in a new row.

   b. Enter a name to appear in the LOV.

   c. Enter a description

   d. Enter a minimum and a maximum win probability value for this stage in the **Min** and **Max** fields.

      If the profile "OS: Opportunity Probability link is set to warning or error, users will only be able to select win probabilities within the range for the stage selected.

   e. Enter a start date in the **From** field. An entry in this field is mandatory.

   f. Optionally, enter an end date in the **To** field. If an end date is entered, the Sales Stage will be disabled after that date.

3. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Sales Stage will be displayed on the Partner Relationship Management screen, the Oracle Sales screen, or both. The default entry is All.

4. Click the **Enabled** checkbox to enable the Sales Stage. If the **Enabled** box is not checked, the Sales Stage will not be enabled.

5. Save your work.

5d) Calendar

To be added.

5e) Define Credit Types (Order Management)

Forecast and other credit types need to be set up for use in Oracle Sales Online. Use the following procedure to define credit types.

Steps

1. Switch responsibility to Order Management Superuser.
2. Choose Set up > Sales > Credit Types

   The Sales Credit Type window appears.

3. Enter the user defined Forecast Credit Type name and description in the appropriate fields.
4. Select the Quota check box if the forecast credit type applies to revenue quota sales credit that you assign to salespeople. This means if it is forecastable
5. Select the Enabled checkbox to activate the forecast credit type.
6. Enter values in profile options.
7. Switch responsibility to System Administrator, and choose **Profiles > System**
8. Query "OS: Forecast Sales Credit Type" and enter the value that you want to use for Forecast Sales Credits. The value must have the quota checkbox selected.
9. Query "OS: Compensation Sales Credit Type" to set compensation sales credits. The quota checkbox should be unchecked.
10. Save your work.

Defining Interest Types and Codes

Interest types and codes allow you to classify your accounts, contacts, opportunities, expected purchases, i.e., purchase lines, and the current environment.

Interest types and codes can represent classes of products your company produces or provide a way to classify accounts and opportunities according to the categories your organization cares about. Examples include geographic location, business size, industry, or economic sector. Interest types and codes can also be used for assigning territories and for forecasting.

5f) Interest Types

Interest Types can be used to classify your accounts, contacts, opportunities, and purchases in a number of ways. An interest type can represent any classification of products.

The Interest Type classification has three layers:

Interest Type

Primary Interest Code
Secondary Interest Code

Use the following procedure to define Interest Types.

Steps

1. Choose **Oracle Sales Setup > Sales Categories > Interest Codes and Types >Types** under the Oracle Sales Administrator responsibility.

   The Interest Types Window appears.

2. Select the first blank **Type** field and enter the name of the interest type.
3. Optionally, enter a description in the **Description** Field.
4. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Contact Interest, Opportunity Classification, Expected Purchase).

   Note: Oracle Sales Online does **not** use interest types for account Oracle Sales Online uses the Trading Community Architecture (TCA) Customer Classification lookup. See the Lookup section of this document.

5. Select the Globally Enabled checkbox to indicate that the classification is to be activated throughout the entire implementation. Or, alternatively, select the Enabled by Organization checkbox if the classification is only to be activated within the specific organization.
6. Click the **Enabled** checkbox to enable the interest type. If the **Enabled** box is not checked, the interest type will not appear in the user's interface.
7. Save your work.

5g) Setting Up Interest Codes

For every interest type you can have two levels of interest codes: primary and secondary.

If you are defining interest types to classify your company's products, use the primary code to identify large groupings of products. For example, for a computer company you might use the primary codes computer, peripherals, connectors, printers, and so on. You might then use the secondary codes for product families: desktops, laptops, modems, inkjet printers.

Use the following procedure to create Interest Codes.

Steps

1. Choose **Oracle Sales Setup > Sales Categories > Interest Codes and Types >Codes** under the Oracle Sales Administrator responsibility.

   The Interest Category Sets window appears.

2. Enter the **Interest Type** you wish to set up codes from the List of Values (LOV). The group of checkboxes display where this Interest Type can be used. They are read only and cannot be modified.

3. Click Find to see what codes, if any, have been set up for this Interest Type. The Primary and Secondary Code regions will display the results of the search.

4. In the Primary Codes region, enter the different values desired for the Interest Type. If you are also setting up Secondary Codes, the values entered here will be variables with Secondary Codes as their values.

5. If you are setting up Secondary Codes, click in the **Code** field of the appropriate Primary Code.

6. In the Secondary Codes region, select a blank line and enter a Code and Code Description. If no blank line is available, click the **New Record** button on the toolbar to create one.

7. Save your work.

5h) Plan Element Mapping

To be added

5i) Defining Inventory Structures

Refer to the *Oracle Inventory User's Guide (A83507-01)* for information about defining inventory structures.

5j) Category Set Mapping

If your company uses Oracle Inventory, a great deal of set up time can be saved by importing the category sets and categories to populate the Primary and Secondary Codes in Oracle Sales Online. Category Sets from Oracle Inventory create Primary Interest Codes, and Inventory Categories become Secondary Interest Codes.

Use the following procedure to import interest types and codes from Oracle Inventory.

Steps

1. Choose **Oracle Sales Setup > Sales Categories > Interest Codes and Types >Category Sets Mapping** under the Oracle Sales Administrator responsibility.

   The Interest Category Sets window appears.

2. In the **Category Set Name** field, select the Oracle Inventory Category from the LOV.
3. In the Interest Type field, enter the interest type you would like to populate with inventory category sets and categories. Category Sets populate Primary Interest Codes. Categories become Secondary Interest Codes.
4. Repeat Steps 2 and 3 until you have completed the mapping.
5. Click **Save** on the toolbar when finished.
6. You must run the *Create Interest Codes from Inventory Category Sets and Categories* concurrent program to bring over the Oracle Inventory information.

5k) Working with Multiple Currencies

The multiple currency capabilities of Oracle Sales Online allow your organization to enter sales opportunities and forecasts in different currencies. Oracle Sales Online automatically converts them to a single currency of your choice when summing up forecasts and opportunity purchases in the pipeline.

Oracle Sales Online calculates currency conversion for individual opportunity purchases based on the daily rate on the date a sales representative predicts an opportunity is going to close (the close date). If a conversion rate is missing, then the program looks back in time to find a conversion rate. How far back is determined by setting the value of the profile OS: Maximum Roll Days for Converting Amount. If no rate is found within this period, then Oracle Sales Online repeats the search using the creation date of the purchase rather than the close date. The currency conversion type for opportunities is set by the profile OS: Daily Conversion Type.

If you are using multi-currency features of Oracle General Ledger (GL) in your company, then you can use the daily conversion rates being entered there. Otherwise, you must enter the conversion rates for each day using the Daily Rates Window.

Oracle Sales estimates currency conversion rates for the forecast periods based on one daily conversion rate. Because the rate for a whole period is based on one day's rate, these conversion rates are called "pseudo" period rates. You can choose to use the daily rate at the beginning or the end of a period. For example, if you are setting up the conversion rates for the month of January 2001, you can use either the daily rate on January 1 or January 31 as the rate for the whole month.

Forecasting uses currency conversions in two places: to calculate the total forecast amounts at the bottom of the forecast window and to sum all forecasts from the sales representatives to obtain group forecasts. In both cases it uses the pseudo period rates for the conversion.

Prerequisite Profile Option Setups for Global Forecasting

- Default Forecast Currency

Entering Daily Conversion Rates

If your company does not set daily currency conversion rates in Oracle General Ledger and you are planing to use multi-currency forecasts, you will need to enter conversion rates on a daily basis using the Daily Rates Window. Follow the procedure described below.

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > GL Daily Rates** under the Oracle Sales Administrator responsibility.

   The Daily Rates window appears.

2. Click in the **From** field and enter the currency you are converting from the LOV.
3. If your currency does not appear in the adjacent **To** field, enter it from the LOV.

4. In the **Type** field, enter the conversion rate type from the LOV.
5. Enter the daily conversion rate in either of the currency conversion fields. The second rate will be calculated and entered automatically.
6. Repeat steps 2 through 5 for any other currencies.
7. Save your work.

Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

Follow the procedure below to be able to forecast sales in multiple currencies.

Steps

1. Set the profile option OS: Forecast Calendar to the calendar your organization is using.
2. Follow the steps for the procedure "Setting Up Conversion Types for Period Types" below to enter the types of conversion rates you will use for each period type such as fiscal year, month, or quarter for the calendar you selected in step 1.
3. Set system profile OS: Date Mapping Type for Periods by choosing whether you want to use the daily rate from the start or end date of a period for currency conversion.
4. Follow the steps for the procedure "Defining Conversion Rates for Periods" below to search to see if the conversion rates have been entered for your periods. Enter any missing conversion rates.

Setting Up Conversion Types for Period Types

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > GL Daily Rates** under the Oracle Sales Administrator responsibility.

   The Calendar window appears.
2. Enter the calendar for which you are setting conversion rates from the LOV.
3. Click **Find**. If any period types have conversion rates associated with them, the Types Mappings region will be populated.
4. In **Period Type**, use the LOV to enter a period type for which you wish to set up conversion rates.

5. In **Conversion Type**, use the LOV to enter the currency conversion type you want to use.
6. Check the **Updatable** and **Editable** checkboxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).
7. Repeat steps 4 through 6 for all period types in this calendar.
8. If you want these rates to be updatable and editable by the user, check the appropriate checkbox.
9. Save your work.

Defining Conversion Rates for Periods

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > Pseudo Period Rates** under the Oracle Sales Administrator responsibility.

   The Pseudo Period Rates window appears.
2. Enter the calendar your organization is using from the LOV in the **Calendar** field. This should be the same calendar set up in OS: Forecast Calendar.
3. Select the **Start Date** or **End Date** radio button. Your selection must be the same as the one you made when you set up the OS: Date Mapping Type for Periods system profile.
4. If you want to modify information only about a single period, enter the period name in the **Period** field. If this field is left blank, the search will display all periods that have daily rates entered for them.
5. Click **Find**.
6. The Period Rates region will display all periods that have the rate values available.
7. If any periods are missing, you will have to add them manually:
   a. Click in an empty **Period** field in the Period Rates Region (or create one by clicking the **New Record** button in the toolbar) and use the LOV to enter a period.
   b. Using the LOV, enter the currency you wish to convert in the **From** field.
   c. Using the LOV, enter the currency you wish to convert to in the **To** field.

   d. Enter the rate in the **Rate** field.
   e. Repeat steps a through d until you have added all the periods you wish to be able to forecast.

8. If you wish to modify any displayed rates, you can do so by making a change in the **Rates** field.

   Note: You cannot modify the rate field if the **Updatable** checkbox is not checked. This checkbox is set in the Period Type and Daily Conversion Type Mappings window.

9. Save your work.

Reporting Currency Mapping

Reports are generated using reporting currency.

Steps

1. Choose **Oracle Sales Setup > Multi-Currencies > Reporting Currency** under the Oracle Sales Administrator responsibility.

   The Reporting Currency window opens.

2. Enter transaction currency in the **Transaction Currency** field.
3. Enter reporting currency in the Reporting Currency field.
4. Enter the date the mapping is active in the **Start Date** field.
5. Optionally, enter the date the mapping ends in the **End Date** field.
6. Save your work.

5l) Forecast Category Mapping

Forecast categories are used to categorize a group of product categories for the purpose of forecasting. Currently, the creation of additional forecast categories is not allowed.

Use the following procedure to set up Forecast Categories.

Steps

1. Choose **Oracle Sales Setup > Forecast Category Setup > Forecast Category Mapping** under the Oracle Sales Administrator responsibility.

   The Forecasts Sales Categories window appears.

2. Enter the **Forecast Category Name** from the LOV.
3. Enter the **Interest Type** from the LOV.
4. Enter the **Start Date**.
5. Optionally, enter an **End Date**.

Step 6: Oracle Sales Online Lookup Codes

There are three types of Lookup Codes used in the Oracle Sales Online application:

- Oracle Sales-specific Lookup Codes, which are specific to the Oracle Sales product family
- Oracle Accounts Receivable Lookup Codes, a subset of AR lookups pertaining to Oracle Sales.
- Oracle Order Entry Lookup Codes, which are specific to the Oracle Sales product family.

Viewing Oracle Sales Lookup Code Values

Follow this procedure to view Oracle Sales Lookup Code values.

Steps

1. Choose **Oracle Sales Setup > Lookup Codes > Sales** under the Sales Administrator responsibility.

   The Oracle Sales Lookup window appears.
2. Choose **View > Query by Example > Enter** from the toolbar menu
3. Enter "%" in the **Type** field.
4. From the **Query** menu, select **Run**.
5. Place your cursor in the **Type** field. You can page through the Lookups using the down arrow key to go forward and the up arrow key to go back.

Modifying Lookup Code Values

There are three access levels for Lookups:

- User
- Extensible

- System

The Lookups with the User access level are modifiable, meaning that modifications can be made to the seeded lookup values or new lookup values can be added.

Extensible access level Lookups can only be modified by adding new lookup code into that lookup type; any seeded lookup code cannot be modified.

System access level Lookups are not modifiable.

The access level for each lookup type is displayed in the upper right area of the Sales Lookup window.

Follow the procedure below to make changes to a modifiable Lookup.

Steps

Navigate to the Lookup you wish to modify.

1. To modify a particular default value, you can edit the field directly.
2. To enter new values, click in a blank line and make your entry. If no blank lines are available, select **New Record** from the **Edit** menu.
3. Click **Save** on the toolbar when you are finished modifying the Lookup.

Lookup Code Tables

The following three tables list the Oracle Sales-specific, Oracle Accounts Receivable, and Oracle Order Entry Lookup Codes, along with their descriptions, access level, and seeded values.

Oracle Sales-Specific Lookup Code Values

Sales Lookup	Description	Access Level	Seeded Values & Meaning
ACCESS_PRIVILEGE	Access privilege for employee	S	F (Full unrestricted access) P (Prospecting Access) T (Sales Team Access)
ASTATA_RUN_MODE	Run mode for Territory Assignment concurrent program	S	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)

Sales Lookup	Description	Access Level	Seeded Values & Meaning
CLOSE_REASON	Opportunity close reason	E	A (Availability) C (Competition) F (Function) P (Price) S (Service)
CONTACT_RANK_ON_OPPOR TUNITY	Opportunity contact rank	U	DECISION_MAKER (Decision Maker) END_USER (End User)
FLAG	Flag	S	N (No) Y (Yes)
INTEREST_USE	Interest Use	S	COMPANY_CLASSIFICATION (Company Classification) CONTACT_INTEREST (Contact Interest) LEAD_CLASSIFICATION (Lead or Opportunity Classification)
MC_DATE_MAPPING_TYPE	Date Mapping Type	U	E (End date of a period) S (Start date of a period)
METHODOLOGY_TYPE	Opportunity Methodology Type	E	OOP (Object Oriented)
OPP_ACCESS_PRIVILEGE	Opportunity Access Privilege	S	F (Full Unrestricted Access) O (Full Access by Operating Unit) P (Prospecting Access) T (Sales Team Access)
OPP_PROBABILITY_LINK	Opportunity Probability Link	S	Error (New value is not acceptable) Warning (Warn user about error)
PLAN_ELEMENT_MAPPING	Sales Categories Mapping with Sales Quotas (CN)	S	PCODE (Map quota to primary interest code) SCODE (Map quota to secondary interest code TYPE (Map quota to interest type)
REPORTING_CURRENCY	Reporting Currency	U	USD (US Dollar)

Sales Lookup	Description	Access Level	Seeded Values & Meaning
ROLE_TYPE	Role Type	U	AM (Account Manager) PS (Product Specialist)
SALESFORCE_RELATIONSHIP	Relationship between sales team members and the account	E	Salesforce Relationship
SCD_RUN_MODE	SC Denorm Run Mode	E	1 (Complete) 2 (Update)
UPDATE_ACCESS	Update Access	S	I (Inherit data) R (View data) U (Update subordinate's data)

Oracle Accounts Receivable Lookup Code Values

AR Lookup	Description	Access Level	Seeded Values & Meaning
CONTACT_ROLE_TYPE	Contact Role Type	E	ADMINISTRATIVE_CONTACT_FOR (Administrative Contact For) BILL_PRESENTMENT_ADMIN (Bill Presentment System Administrator) BILL_PRESENTMENT_CSR (Bill Presentment System Customer Service Representative) BILL_PRESENTMENT_ORG_REP (Bill Presentment System Organization Representative) BILL_PRESENTMENT_SITE_ADMIN (Bill Presentment System Site Administrator) BILL_TO (Bill To) BUYING_CONTACT_FOR (Buying Contact For) CEO_OF (CEO) CFO_OF (CFO) CIO_OF (CIO) CONTACT (Contact) CORR (Correspondence) DEPT_HEAD (Department Head) DUN (Dunning) EXECUTIVE (Executive) KEY_DECISION_MAKER_FOR (Key Decision Maker) LEGAL (Legal) LEGAL_CONTACT_FOR (Legal Contact For)

AR Lookup	Description	Access Level	Seeded Values & Meaning
CONTACT_ROLE_TYPE (continued)	Contact Role Type	E	MARKET (Market) MIDDLE_MANAGER (Middle Manager) PRIMARY_CONTACT_FOR (Primary Contact For) RECEIVING_CONTACT_FOR (Receiving Contact For) SHIPPING_CONTACT_FOR (Shipping Contact For) SHIP_TO (Ship To) STMTS (Statement) STOCK_HOLDER_OF (Stock Holder) TECHNICAL_CONTACT_FOR (Technical Contact For)
CONTACT_TITLE	Contact Title	E	DR (Dr.) MISS (Miss) MR (Mr.) MRS (Mrs.) MS (Ms.) SIR (Sir)
COUNTRY	Country	E	CAN (Canada) GER (Germany) NOR (Norway) UK (United Kingdom) USA (United States of America)
CUSTOMER_CATEGORY	Customer Category	E	CUSTOMER (Customer) PROSPECT (Prospect)

AR Lookup	Description	Access Level	Seeded Values & Meaning
DEPARTMENT_TYPE	Department Type	U	ACCOUNTING ADMINISTRATION CUSTOMER SERVICE DISTRIBUTION/LOGISTICS ENGINEERING FACILITIES HUMAN RESOURCES INFORMATION TECHNOLOGY LEGAL MANUFACTURING MARKETING MERCHANDISING OPERATIONS PURCHASING QUALITY ASSURANCE R&D (Research & Development) RISK ANALYSIS SALES TRAINING
INTEREST_TYPE	Interest Type	E	ENTERTAINMENT HOBBIES PREFERENCES SPORTS TRAITS
LANGUAGE	Language	E	ENG (English) FRE (French) GER (German) ITA (Italian) SPA (Spanish)

AR Lookup	Description	Access Level	Seeded Values & Meaning
PARTY_RELATIONS_TYPE	Party Relationship Type	E	ADVERTISER (Advertiser)
			AFFILIATE_TO (Affiliate)
			AGREEMENT_SIGNER_OF (Party that signs agreement on behalf of another party)
			ASSOCIATE_OF (Associate of)
			AUNT (Aunt)
			BENEFACTOR_OF (Benefactor of)
			BENEFICIARY (Beneficiary)
			BILLER_AT (When an organization is registered biller)
			BILLER_FOR (Biller For)
			BILLTO_OF (Alternate billing party for the buyer)
			BILL_CONSOLIDATOR_AT (Bill consolidator at)
			BILL_CONSOLIDATOR_FOR (Bill Consolidator for)
			BILL_PRESENTER_FOR (Bill Presenter at)
			BILL_PUBLISHER_AT (Bill publisher at)
			BILL_PUBLISHER_FOR (Bill publisher for)
			BOARD_MEMBER_OF (Board Member)
			BROTHER_OF (Brother)
			BUSINESS_PARTNER_FOR (Business partner
			CEO_OF (CEO)
			CFO_OF (CFO)
			CHANNEL_FOR (Channel)
			CHILD_OF (child of)
			CIO (CIO)
			COMPETITOR_OF (Competitor)

AR Lookup	Description	Access Level	Seeded Values & Meaning
PARTY_RELATIONS_TYPE (continued)	Party Relationship Type	E	CONSULTANT_FOR (Consultant)
			CONTACT_OF (Contact)
			CONTAINS_MEMBER (Contains member)
			COUSIN_OF (Cousin)
			CUSTOMER_OF (Customer)
			DAUGHTER_OF (Daughter)
			DEPENDENT_OF (Dependent)
			DIVISION_OF
			DOMESTIC_PARTNER_OF (Domestic Partner)
			DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of)
			DOMESTIC_ULTIMATE_OF (Domestic Ultimate of)
			EMPLOYEE_OF (Employee)
			EMPLOYER_OF (Employer)
			FATHER_OF (Father of)
			FIELD_SERVICE_PROVIDER_FOR (Field Service provider)
			GENERAL_EMPLOYEE_OF (General Employee)
			GLOBAL_SUBSIDIARY_OF (Global subsidiary of)
			GLOBAL_ULTIMATE_OF (Global Ultimate of)
			GUARANTOR_FOR (Guarantor)
			GUARDIAN_OF (Guardian)
			HEADQUARTERS_OF (Headquarters of)
			KEY_DECISION_MAKER_FOR (Key decision maker)
			LEGAL_COUNSEL_FOR (Legal counsel for)
			MANAGER_OF (Manager_of)

AR Lookup	Description	Access Level	Seeded Values & Meaning
PARTY_RELATIONS_TYPE (continued)	Party Relationship Type	E	MEMBER_OF (Member)
			MOTHER_OF (Mother)
			OWNED_BY (Owned)
			PARENT_OF (Parent)
			PARTNER_OF (Partner)
			PAYFROM_OF (Alternate party to pay for a buyer)
			PAYTO_OF (Alternate payee name for the seller)
			PUBLISHER (Publisher)
			REFERENCE_FOR (Reference)
			_OF (Relative)
			REPAIR_DEPOT_PROVIDER_FOR (Repair depot provider)
			REPORTS_TO (Reports to)
			SELLER_FOR (Seller)
			SELLER_TO (Seller to)
			SHIPTO_OF (Alternate shipping party for the buyer)
			SIBLING_OF (Sibling)
			SISTER_OF (Sister)
			SON_OF (Son)
			SPOUSE_OF (Spouse)
			STOCK_HOLDER_OF (Stockholder)
			STUDENT_OF (Student)
			SUBSIDIARY_OF (Subsidiary)
			THIRD_PARTY_OF (Third party)
			UNCLE_OF (Uncle)
			VAD_OF (VAD of)
			VAR_OF (VAR of)
			VENDOR_OF (Vendor)

AR Lookup	Description	Access Level	Seeded Values & Meaning
PARTY_SITE_USE_CODE	Party Site Use Code	E	ACK (Acknowledgments) ADMINISTERED_BY (Administered By) BILL_TO (Bill To) BOL (Bills of Lading) BUSINESS (Business) CM (Credit Memos) COLLATERAL_MAIL_TO (Collateral Mail To) CORR (Correspondence) CUSTOMER_REGION (Customer Region) DELIVER_TO (Deliver To) DRAWEE (Drawee) DUN (Dunning) GENERAL_MAIL_TO (General Mail) HEADQUARTERS_FOR (Headquarters for) HOME (Home) INCORPORATED_TO (Incorporated) INSTALL_AT (Install At) INV (Invoice) ISSUED_BY (Issued By) KEY_SITE (Key Site) LEGAL (Legal) LEGAL_ADDRESS_OF (Legal Address) LEGAL_RESIDENCE_OF (Legal Residence) MARKET (Market) MARK_FOR (Mark For) NOT_ALLOWED_INTO (Not Allowed Into) OFFER_TO (Offer to)

AR Lookup	Description	Access Level	Seeded Values & Meaning
PARTY_SITE_USE_CODE (continued)	Party Site Use Code	E	OTHER (Other) PAYMENT_WILL_BE_MADE_BY (Be Made By) PAY_TO (Pay To) REPLY_TO (Reply To) REPORT_TO (Report To) RESIDES_AT (Resides At) SHIP_FROM (Ship From) SHIP TO (SHIP_TO) SOLD_TO (Sold To) STMTS (Statements) STORE (Store) SUPPORT_SITE (Support Site) WORKS_AT (Works At) WORK_PERFORMED_AT (Work Performed At)
PHONE_LINE_TYPE	Phone line type	E	FAX GEN (General) IW (Inbound watts) OW (Outbound watts)

AR Lookup	Description	Access Level	Seeded Values & Meaning
RESPONSIBILITY	Responsibility	E	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Receivable Supervisor) CFO (CFO) COLCT (Collection) COLCTSUP (Collection supervisor) CONTRLR (Controller) GLC (General ledger clerk) GLS (General ledger supervisor) SOC (Sales operation clerk) SOS (Sales operations supervisor) TRSUR (Treasurer)
STATE	State	E	AK (Alaska) AL (Alabama) AR (Arkansas) AZ (Arizona) CA (California) CO (Colorado) CT (Connecticut) DC (District of COlumbia) DE (Delaware) FL (Florida) GA (Georgia) HI (Hawaii) IA (Iowa) ID (Idaho) IL (Illinois) IN (Indiana) KS (Kansas) KY (Kentucky)

AR Lookup	Description	Access Level	Seeded Values & Meaning
STATE (continued)	State	E	NM (New Mexico)
			NV (Nevada)
			NY (New York)
			OH (Ohio)
			OK (Oklahoma)
			OR (Oregon)
			PA (Pennsylvania)
			RI (Rhode Island)
			SC (South Carolina
			TN (Tennessee)
			TX (Texas)
			UT (Utah)
			VA (Virginia)
			VT (Vermont)
			WA (Washington)
			WI (Wisconsin)
			WV (West Virginia)
			WY (Wyoming)

Oracle Order Entry Lookup Values

Order Entry Lookup	Description	Access Level	Seeded Values & Meaning
SALES_CHANNEL	Sales Channels	S	DIRECT (Direct)
			INDIRECT (Indirect)

Step 7: Setting System Profile Options

Oracle applications let you set up your applications according to your company's business requirements. System profiles define how an application behaves for users.

The procedure for setting up and changing profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Profile options can be set at four different levels:

- **Site:** Indicates that the profile option is set at the site level. The site level setting affects the entire database. The Value is either **Yes** or **No**.
- **Application:** Indicates that the profile option is set at the application level. When a profile option is set at this level it overrides the site level setting. The Value is either **Yes** or **No**.
- Responsibility: Indicates that the profile option is set at the responsibility level. The responsibility level setting affects users of a given responsibility. When a profile option is set at this level it overrides site and application level settings. The Value is either Yes or No.
- **User:** This setting affects individual users. When set, it overrides values set at the site, application, and responsibility levels. The Value is either Yes or No.

The profile options which can be used for Oracle Online have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)

Setting or Changing Profile Options

Use this procedure to set or change profile options.

Steps

1. Choose **Oracle Sales Setup > System Profiles** under the Oracle Sales Administrator responsibility.

The Find System Profile Values window appears.

2. Enter your search criteria in the Display region.
3. Click in the **Profile** Field. Enter a partial name of the profile using "%" as a wild card.
4. Click **Find**.

   The found profiles are displayed in the System Profile Values window.
5. Click in the field of the profile you wish to set or change.
6. Select a value from the List of Vales (LOV).
7. Click **Save** on the toolbar.

The following table lists the Oracle Sales Online profile names, descriptions, and applicable default values and recommended values. An asterisk (*) after a profile name indicates that the user can set the profile in Personal Profiles. *Italicized* profile names are reserved for future use.

Oracle Sales Online Application Profiles

Functional Area	Profile Name	Profile Description	Default Value
Access	OS: Customer Sales Team Default Role Type	Customer Sales Team Default Role Type (Account Manager or Product Specialist and any user defined roles)	Account Manager
Access	OS: Manager Update Access	Manager Update Access (U) Update (I) Inherit access privilege (R) View data	View Data
Access	OS: Customer Access Privilege	Customer Access Privilege (Full, Prospecting, Sales Team)	Full
Access	OS: Opportunity Access Privilege	Opportunity Access Privilege Global Full Full Prospecting Sales Team	Global Full

Functional Area	Profile Name	Profile Description	Default Value
Access	OS: Sales Admin Update Access	Sales Update Admin Access Update (U) Inherit access privilege (I) View Data (R)	View Data (R)
Activity	OSO: Default Activity Priority*	Default Activity Priority	High
Activity	OSO: Default Activity Status*	Default Activity Status	Open
Activity	OSO: Default Activity Type*	Default Activity Type	Appointment
Activity	OSO: Default number of days to filter tasks	Display tasks for the last <n> days	180
Customer	OSO: Default Address Lines*	Default Address Lines	2
Customer	OSO: Default Address Type	Default Address Type	Marketing
Customer	OSO: Default Customer Category*	Default Customer Category	Customer
Customer	OSO: Default Organization Phone Type*	Default Organization Phone Type	General
Customer	OSO: Default Organization*	Default Org Relationship	Employer of
Customer	OSO: Default Person Phone Type*	Default Person Phone Type	General
Customer	OSO: Default Person Relationship*	Default Person Relationship	Employee
Forecast	OSO: Default Forecast Currency*	Default Forecast Currency	
Forecast	OSO: Default Forecast Period Type*	Default Forecast Period Type	None
Forecast	OSO: Default Forecast Worksheet Lines*	Default Forecast Worksheet Lines	0
Forecast	OSO: Display Subordinate Current Pipeline*	Display Subordinate Current Pipeline	Yes

Functional Area	Profile Name	Profile Description	Default Value
Forecast	OSO: Display Opportunity Worksheet Grand Totals*	Display Opportunity Worksheet Grand Totals	No
Forecast	OSO: Forecast Calendar Month	The number of periods available for forecasting.	3
Forecast	OS: Daily Conversion Type	Currency conversion type for daily conversion rates.	Corporate
Forecast	OS: Date Mapping Type of a Period for Pseudo Period Rates	Currency conversion date	Start date of a period
Forecast	OS: Forecast Calendar	Name of the calendar you are using to manage your forecasts	None
Forecast	*OS: Forecast Current Freeze Period*	Rolling Forecast Current Freeze Period label	
Forecast	*OS: Forecast Status Confidence*	Forecast status confidence for MRP integration	None
Forecast	*OS: Forecast Freezing Enabled*	Forecast Freezing for Rolling Forecast enabled or not	No
Forecast	*OS: Forecast Price List*	Price List for Sales Forecast and Opportunity	None
Forecast	*OS: Forecast Price Volume Margin*	Revenue Volume correspondence tolerance margin	None
Forecast	*OS: Forecast Rolling Calendar Periods*	Number of periods in forecast rolling calendars	None
Forecast	*OS: Forecast Upside COnfidence*	Forecast Status confidence for MRP integration	None
Forecast	*OS: Volume Forecasting Enabled*	Volume Forecasting enabled or not	None
Opportunity	OS: Forecast Sales Credit Type	Forecast Credit Type for Opportunity Sales Credits	None
Fulfillment	JTF_FM_CREATE_DEST	(Value) asfCntctAdsrhMain.jsp	None
General	OSO: Default Country*	Default Country	United States
General	OSO: Default Note Type*	Default Note Type	User Generated Note
General	OSO: Default Notes Display Days*	Display notes for the last <n> days	180

Functional Area	Profile Name	Profile Description	Default Value
General	OSO: Default Sales Group and Role*	Default Sales Group and Role to use for log in	XXXXX
General	OSO: Display Tracking Information*	Flag indicates whether to show tracking data	Yes
General	OSO: Debug Message On		No
General	OSO: SQL Trace On		No
General	OS: Preferred Reporting Currency	Preferred Currency for Denorm Programs	US Dollar
Opportunity	ASO: Product Organization	Org id used in inventory items to display	
Opportunity	OSO: Enable Lead Share	Display Opportunity Exchange button	No
Opportunity	OS: Inventory Category Integration	Flag to populate inventory categories in Oracle Sales	Yes
Opportunity	OS: Compensation Sales Credit Type	Compensation Sales Credit Type	None
Opportunity	OS: Customer Address Required for Opportunity Sales Lead	Customer Address Required for Opportunity and Sales Lead	No
Opportunity	OS: Default Close Date Days*	Default Opportunity close date days	30
Opportunity	OS: Default Opportunity Sales Stage*	Default Sales Stage	Stage 1
Opportunity	OS: Default Opportunity Status*	Default Opportunity Status	Preliminary
Opportunity	OS: Default Opportunity Win Probability*	Default Opportunity Win Probability	10-Prospecting (Qualified)
Opportunity	OS: Default Sales Channel*	Default Sales Channel	Direct
Opportunity	OS: Generate Opportunity System Notes	Determines whether or not notes are generated when parts of the opportunity change	Yes
Opportunity	OS: Maximum Roll Days for Converting Amount	Maximum Roll Days for converting amount if no conversion rate for a day	None
Opportunity	OS: No Opportunity Ceiling	Level above which the opportunity ceiling cannot be changed	90-Final Paperwork

Functional Area	Profile Name	Profile Description	Default Value
Opportunity	OS: Opportunity Delete Ceiling	Level above which a probability can no longer be changed	90-Final Paperwork
Opportunity	OS: Opportunity Probability Link	Determines whether a warning or an error is given if the win probability amount does not fall within the sales stages probabilities	Warning
Opportunity	OS: Opportunity Sales Credit Enforced Sales Team Definition	Salesperson cannot be removed from the sales team if they have sales credits	Yes
Opportunity	OS: Opportunity Status Override	Determines whether or not the opportunity status can be changed	Yes
Opportunity	OS: Sales Methodology*	Sales Methodology	Object Oriented
Opportunity	OS: Sales Team Creator Keep Flag	Default keep flag for sales team creator	
Preferences	ICX: Date Format Mask*	Date Format Mask	31-Dec-99
Preferences	ICX: Language*	Language	American English
Preferences	JTF_PROFILE_DEFAULT_ APPLICATION	(Value) 522. This profile option must be set at the user level only	None
Preferences	JTF_PROFILE_DEFAULT_ CSS*		jtfucss.css
Preferences	JTF_PROFILE_DEFAULT_ RESPONSIBILITY*	(This profile must be set at the user level only. (Values) The values are seeded responsibilities: User (22405), Manager (22406), Administrator (22477).	None
Preferences	JTF_PROFILE_DEFAULT_ CURRENCY*		USD
Preferences	JTF_PROFILE_DEFAULT_ NUM_ROWS*		15
Preferences	JTF_PROFILE_DEFAULT_ BLANK_ROWS*		3
Sales Comp	*OSO: Default Sales Comp Period Type*	Default Sales Comp Period Type	None
Territory	OS: Territory Minimum Number of Records for Parallel Processing	Minimum number of records for parallel processing	100

Functional Area	Profile Name	Profile Description	Default Value
Territory	OS: Territory Number of Child Processes	Number of Child Processes	1
Territory	OS: Territory Records to Commit	Maximum number of records to commit for AS_TERRITORY_ACCESSES and AS_ACCESSES tables	1000
Territory	OS: Territory Records to Open for Processing Changed Accounts	Number of records to process per open cursor period, for processing changed accounts	100
Territory	OS: Territory Records to Process	Maximum number of records to process by the territory assignment program before committing work	

Step 8: Setting Up Note Types

Oracle Notes is a CRM Foundation Component. Oracle Notes comes with a set of predefined note types. You may choose not to use the predefined note types and create customized note types of your own. Or, you can use both the predefined set and additional customized note types.

Refer to the Implementing Notes section of the *Oracle CRM Foundation Implementation Guide* for additional information about setting up Oracle Notes.

Use the following procedure to set up note types.

Steps

1. Choose **CRM Foundation >Notes Setup> Note Type Setup** under the Sales Administrator responsibility.

   The Application Object Library: Note Type Lookups window appears.

2. Define the code, meaning, and description as desired. It is only necessary to define a tag for a new, customized note type.
3. **Save** the record when you are finished.

Deleting an Existing Note Type

Assign an end date to an existing note type to delete it.

Mapping Note Types to a Source

When you map a note type to a source object, you limit the visible note types for that source to the defined subset of note types.

Step 9: Territory Management

Refer to the Implementing Territory Manager section of the *Oracle CRM Foundation Implementation Guide* for information about setting up territory management.

Step 10: Task Manager

Oracle Sales Online Task functionality is limited to the following:

1. Defining Task Status (Status Transition and Rules is not supported)
2. Defining Task Priorities
3. Defining Task Types (Resource Requirements and Workflow are not supported)
4. Defining Task Templates (Dependencies and recurrences are not supported).

Step 11: Interaction History

Refer to the Implementing Interaction History section of the *Oracle CRM Foundation Implementation Guide* for information about setting up Interaction History.

Step 12: Marketing Encyclopedia

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia Concepts and Procedures (A83637-01)*

Step 13: Marketing Campaigns

Refer to the Oracle Marketing Concepts and Procedures guide(A83622-01) for information about this topic.

Step 14: FulFillment

Refer to the 1-to-1 Fulfillment section of the *Oracle CRM Foundation Implementation Guide* for information about setting up Fulfillment.

Step 15: Opportunity Exchange

To be added.

Step 16: Run Concurrent Programs

Oracle Sales Online includes a number of programs that perform functions on groups of records in the database. These batch programs run on the server and are called concurrent programs.

For detailed instructions for running and maintaining concurrent programs, refer to the *Oracle Applications User's Guide* and the *Oracle Applications System Administrator's Guide*.

Concurrent Programs Used by Oracle Sales Online

Oracle Sales Online includes the following concurrent programs:

- Assign Territory Accesses: (optional). This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting two profile options:
  - OS: Territory Minimum Number of Records for Parallel Processing
  - OS: Territory Number of Child Processes
- Generate Access Records (optional)
- Load Sales Credit Mviews: (mandatory). Used for the homepage bins. This program must be run initially before users can set up bins. This program loads the materialized view with sales credit information. No parameters are needed.
- Refresh Sales Credit Mviews: (mandatory). This program is used to run an incremental refresh of the materialized view. This program should be scheduled to run periodically.
- Refresh of as_sales_credits_denorm: (mandatory). Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters are:
  - Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh)

  - Incremental Refresh = Run in this mode for an incremental refresh.
- Incremental refresh of as_mc_sales_credits_den table: Used to refresh conversion rates. This programs should be run after transaction currency to reporting currency mapping is completed, or after changing any conversion rates. See Step 5k earlier in this document. Parameters are:
  - From Currency
  - To Currency

Running Concurrent Programs

Use the following procedure to run concurrent programs.

Steps

1. Under the System Administrator responsibility, choose **Security > Requests > Run**
2. Select Single Request.
3. Enter the name of the desired concurrent program, or select from the list of values.
4. Enter parameters.
5. Click **Submit**