Oracle® TeleSales

Implementation Guide

Release 11*i*

November 2000

Part No. A86830-01

ORACLE®

Oracle TeleSales Implementation Guide, Release 11*i*

Part No. A86830-01

Contents

Preface vii

Intended Audience vii
How Implementation Topics are Organized vii

Implementing Oracle TeleSales

Considerations for Planning an Implementation Project 1
Purpose for Planning an Implementation Project 2
Business Requirements Mapping 3
Application Architecture 4
End User Role and Functions 5
Typical Release Dependencies 6
Related Products and Components 6
Upgrading from Oracle TeleSales 7
Implementation Dependencies 8
Related Documentation and Resources 9
Setting Up Oracle TeleSales 12
Navigation 12
Implementation Steps 12
Setting Up Oracle TeleSales Users 20
Campaign Rules for Set Up 22
Collateral Rules for Set Up 22
Event Rules for Set Up 23
Universal Work Queue Rules for Set Up 24
Order Capture Items for Set Up 25
Lookup (Quick) Codes Set Up 27
Setting Up Quick Menu 30
Verifying AOL Menu for Quick Menu 31
Adding Form Function to Your Responsibility 31

Changing System Profile Value 32
Using Seed Filter Values 32
Using Seed Filter Functions 32
Oracle TeleSales Administration Tasks 33
Creating User Accounts 33
Assigning TeleSales Responsibilities to User Accounts 34
Assigning Resources to Roles 35
Defining Groups 36
Resetting Passwords 37
Setting Profile Options 38
Testing an Implementation Project 93

Send Us Your Comments

Oracle TeleSales Implementation Guide, Release 11*i*

Part No. A86830-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via the postal service.

Oracle Corporation
CRM Content Development Manager
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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

Preface

This Implementation Guide provides information and instructions to help you implement Oracle TeleSales, 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 is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle CRM and ERP applications. You must have an understanding of Oracle CRM and ERP and applications before proceeding.

How Implementation Topics are Organized

The implementation topics in this guide are grouped in a multi-level hierarchy giving different levels of detail on the steps of your implementation.

The Implementation Steps topic lists the major steps in your implementation. Many of the steps are linked to procedures that give you more detail. The steps in these linked procedures may, in turn, be linked to yet other more detailed procedures. Each step must be performed for the application to run properly.

The topics are optimized for online delivery. This means that this guide is best read in the PDF format. Printing this document makes it impossible for you to follow the hyperlinks between topics.

Implementing Oracle TeleSales

This guide provides general descriptions of the setup and configuration tasks required to successfully implement Oracle TeleSales. The following topics are covered in this guide:

- Considerations for Planning an Implementation Project
- Typical Release Dependencies
- Implementation Dependencies
- Related Documentation and Resources
- Setting Up Oracle TeleSales
- Implementation Steps
- Oracle TeleSales Administration Tasks
- Setting Profile Options
- Testing an Implementation Project

Considerations for Planning an Implementation Project

The topic includes the following information

- Purpose for planning an implementation
- Business requirements mapping
- Application architecture
- End user role and functions
- Typical business processes for Oracle TeleSales

Purpose for Planning an Implementation

A well thought out implementation plan translates to a smooth implementation.

Oracle TeleSales implementation planning requires that you take a detailed and careful look at the following areas:

- **Requirements Assessment**
- **Worksheets and Checklist**
- **Installation and Configuration Process**
- **Operational Testing**

AIM's Role in the Implementation Planning of Oracle TeleSales

An essential implementation tool, available to the Oracle Consultant is the Application Implementation Method (AIM). Using this methodology ensures a successful implementation. AIM helps consultants collect, analyze, and adjust all aspects of a consulting implementation: business rules and processes, financial and scheduling aspects, technical requirements, analysis and design, etc.

AIM is available on the Oracle intranet at http://agsl.us.oracle.com under the Methods tab. If you have not adopted this methodology, it would advantageous to do so. Several references to the AIM documentation are included in this document, using the two-letter software life cycle designation, followed by a pointed serial number, e.g., "RD.050", a Requirements Definition document entitled "Gather Business Requirements". Note that not all AIM documents are cross-referenced herein; see the Applications Global Service Line (AGSL) web site for more information.

References

Refer to following URLs for additional information.

Applications Global Service Line (AGSL) at http://agsl.us.oracle.com/

Business On Line at http://bol.us.oracle.com

CRM Portal on iXchange at http://ixchange.us.oracle.com

CRM Product Information: CRM Division Deliverables at http://crm/ssi/prp/pdinfoweb/all_deliverables_11i.html

CRM at http://crm.us.oracle.com

CRM Internationalization and Globalization at http://crm.us.oracle.com/ssi/develop/ing/index.html

CRM Swat Team / References / RFPS at http://sfaswat.us.oracle.com

Customer Intelligence Web Site at http://fastforward.us.oracle.com, at the top of the page, click on Customer Intelligence

Oracle Business Models at http://obmweb.us.oracle.com/

Oracle University Performance Consulting at http://education.oracle.com/applications/perfcon.html/

Products / Positioning / Features / Collateral at http://products.us.oracle.com/

Solution Value Assessments at http://value.us.oracle.com/

Planning Tool Kit

The Oracle TeleSales Tool Kit has been developed to assist consultants who are entering the planning stages of a TeleSales implementation in a *build to order* fashion to meet individual customer needs. It is hoped that over time, it will serve as a recipe for success, incorporating lessons learned as well as suggested updates by users of the document to improve the document and facilitate the implementation process. The Planning Tool Kit document contains various information that can be used during the planning process. This includes:

- TeleSales Overview
- Planning Considerations
- Discovery Questionnaire
- Key Deliverables
- Proposal
- Project Management considerations
- Sample Scope, Objectives, and Approach

References

Refer to following URL for additional information.

http://ixchange.us.oracle.com/php/docs/F210546/TELESALESPLANNINGTOOLKIT.DOC

Business Requirements Mapping

Oracle TeleSales is specifically designed to meet the requirements of teleagents in an interaction environment. Like all Sales applications, it provides for account management, opportunity management, contact management, in addition to quote quote generation. Oracle TeleSales integrates the lead and opportunity management process with field sales so customers can easily share leads across multiple sales channels.

Business requirements mapping aids a consultant in mapping the customers needs against what a product can actually provide. Reference the *Software Requirements Document CRM Release 11i - Oracle TeleSales* for more information about the software requirements that have been identified for Oracle TeleSales.

Oracle TeleSales provides for:

- improved business-consumer and business-to-business support
- collateral fulfillment
- event registration
- globalization
- lead management
- lookup management
- opportunity management
- organization and contact management
- outbound calling campaigns through Oracle Advanced Outbound integration
- personal productivity support
- pipeline and forecast management
- quote and order management
- quote configuration
- resource management
- territory management

Application Architecture

The application architecture for Oracle TeleSales is as follows:

Tech Stack

Oracle RDBMS Version ver. 8.1.6.1 (Final) (Database) [Server Partitioned Mode]

Oracle Forms Designer ver. 6.0.8.8.0

Oracle Reports Designer ver. 6.0.8.8.3

Oracle Graphics ver. 6.0.5.39.0

EWT ver. 3.3.6

Oracle Application Server ver. 4.0.7.1

Oracle Work Flow ver. 2.5

CRM Bali Spread Table ver. 1.0

Bali HGrid

Java JDK ver. 1.1.7

Oracle Jinitiator ver. 1.1.7

Oracle Application Object Library (AOL) Release 11.5.29 (Forms 6.0.6.3)

End User Role and Functions

Oracle TeleSales provides teleagents with a personal home page from which they can select and work within three separate and distinct user interfaces: eBusiness Center, Opportunity Center and Leads Center.

Oracle TeleSales is a robust application and serves the needs and requirements of a vast user set. It meets the needs and can be used by the telesales users, direct response users, sales management, and territory administrators.

- **TeleSales Users** will use Oracle TeleSales to perform and address the following:
  - Customer Management
  - Opportunity Management
  - Contact Management
  - Lead Generation
  - Collateral Fulfillment
  - Event Registration
  - Pipeline and Forecasting
  - Interaction Center - Notes, Interactions, Work Queue
  - Quote Management

  - Order Capture
- **Direct Response Users** will use Oracle TeleSales to perform and address the following:
  - Customer Management
  - Contact Management
  - Lead Generation
  - Event Registration
  - Interaction
- **Sales Management** will use Oracle TeleSales to perform and address the following:
  - Forecasting
  - Quota Administration
  - Quote Configuration
  - Territory Management and Administration
  - Interactive Center Intelligence

Typical Release Dependencies

- Related Products and Components
- Upgrading from Oracle TeleSales 3*i*

Related Products and Components

Oracle TeleSales provides functional integration with the following Oracle applications:

- Oracle Marketing
- Oracle 1-to-1 Fulfillment
- Oracle Scripting
- Oracle Universal Work Queue
- Oracle Order Capture
- Oracle Sales Compensation

- Oracle Sales Online
- Oracle Workflow
- Oracle Customer Care
- Oracle Resource Manager
- Oracle Interaction History
- Oracle Territory Assignment

Upgrading from Oracle TeleSales 3*i*

Use this procedure to upgrade Oracle TeleSales 3*i* to Oracle TeleSales 11*i*.

Prerequisites

Upgrading from an earlier version of Oracle TeleSales. The earlier versions are CRM 3*i*, CRM 3.1.1, and CRM 3.1.2 and any patches to these releases.

Steps

Step Number	Set Up Steps
❑ Step 1	Install Oracle Applications 11*i*, release 11.5.1. See: Installing Oracle Applications Release 11*i*. http://pkm.us.oracle.com/~gseiden/11idoc/acrobat/r115insx.pdf
❑ Step 2	Install Oracle CRM Family Pack 1
❑ Step 3	Install the Upgrade patch.

Resources

- See Upgrade Strategy Oracle Sales 11*i*, Data Mapping and Upgrade document for 3*i* to 11*i* data mapping.
- See Upgrading Oracle CRM Applications to 11*i*, at http://crm.us.oracle.com/ssi/develop/relinfra/files/11iMigration.doc for additional reference information.
- See Updating Oracle Applications located at http://pkm.us.oracle.com/pdfdocs/r11i/r115ugx514.pdf for additional reference information.

- See Oracle Application Release Notes located at http://pkm.us.oracle.com/pdfdocs/r11i/r11irnux.pdf for additional reference information.

Implementation Dependencies

Overview

A prerequisite to the successful implementation of Oracle TeleSales is to ensure that all products in which Oracle TeleSales depends or is integrated to, have been successfully installed. The following is a list of those applications:

Dependencies

- Oracle Core Sales
- Oracle Universal Work Queue
- Oracle Interaction History
- Oracle Task Manager
- Oracle Notes
- Oracle Customer Care
- Oracle Order Capture
- Oracle Marketing

Integration

- Oracle CRM Foundation Components (Interaction History, Task Manager, Notes, 1-to-1 Fulfillment)
- Oracle Scripting
- Oracle Universal Work Queue
- Oracle Customer Care
- Oracle Order Capture
- Oracle Marketing
- Oracle Telephony Manager
- Oracle Campaign Plus

- Oracle Predictive
- Oracle Inventory
- Oracle Core Sales
- Oracle Partner Relationship Management
- Oracle ERP applications (HRMS, Inventory, Contracts)

Related Documentation and Resources

There are several locations within the Oracle intranet where you can find information on Oracle TeleSales and supporting information on the implementation of Oracle TeleSales.

Document	Purpose	Location
BR.100 Application Setup - Global Application Set Up for Oracle TeleSales 11*i* and Oracle Sales Online 11*i* and Partner Relationship Management 11*i*	Provides the information necessary to configure servers and workstations for use with Oracle TeleSales.	
Oracle Applications Concepts Release 11*i*	This guide provides an introduction to concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind and major issues for applications-wide features, such as Business Intelligence (BIS), languages and character sets, and self-service applications.	http://pkm.us.oracle.com/%7Egseiden/11idoc/acrobat/r115insx.pdf

Document	Purpose	Location
Installing Oracle Applications, Release 11*i*	Installing Oracle Applications proxies instruction for managing your installation of Oracle Applications products. In this release of Oracle Applications, much of the installation process is handled using the new Oracle Rapid Install product. This minimizes the time it takes to install Oracle Applications and the Oracle 8i Enterprise Edition technology stack by automating many of the required steps.	http://pkm.us.oracle.com/~gseiden/11idoc/acrobat/r115insx.pdf
Oracle Applications User's Guide	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*.	http://pkm.us.oracle.com/~gseiden/11idoc/acrobat/115oaug.pdf
Implementing CRM Applications Release 11*i*	Implementing CRM Applications provides instructions for completing your installation of Oracle Customer Relationship Management (CRM) products.	http://pkm.us.oracle.com/~gseiden/11idoc/acrobat/crm1151ig.pdf
Oracle Call Center Applications Setup Release 11*i*	This guide covers the installation of the Oracle Call Center and Telephony Application components.	http://pkm.us.oracle.com/~gseiden/11idoc/acrobat/cct1151ig.pdf
CRM 11*i* Latest Release Info	Link to the latest CRM 11*i* Release information including 11.5.1 Platform and CRM Family Pack 1 information.	http://crm.us.oracle.com/product/11i/docs/familypackinfo.html
Test Plan Document, Oracle TeleSales Release 11*i*	The Oracle TeleSales Test Plan is used by QA during the testing phase. The document is in MS Word format.	http://crm.us.oracle.com/cgi-bin/stp11imatrix.cgi
Interaction Center Quick Start Guide	The Interaction Quick Start Guide is to be used as a reference point for all interaction center products.	http://crmed2:2000/d11i.home - Select Call Center Applications
Oracle TeleSales Concepts and Procedures Release 11*i*	The concepts and procedures document provides information and instruction to help you work effectively within Oracle TeleSales.	http://pkm.us.oracle.com/%7Egseiden/11idoc/html/crmset.html, Part Number=A86831-01.

Document	Purpose	Location
Oracle TeleSales Technical Reference Manual Release 11*i*	Provides information about the Oracle TeleSales schema.	http://pkm.us.oracle.com/%7Egseiden/11idoc/html/trmset.html, Part Number= A86211-01.
eTRM for Oracle TeleSales	Provides extensive and detailed information about dependent application objects, forms, PL/SQL, Java file types and diagrams.	http://etrm.us.oracle.com
Managing People Using Oracle HRMS Release 11*i*	This guide contains the information you will need to understand and use Oracle HRMS.	http://pkm.us.oracle.com/~gseiden/11idoc
Oracle Applications System Administrator's Guide Release 11*i*	This guide is the primary source of information about Oracle Applications System Administration. It contains overviews as well as task and reference information.	http://pkm.us.oracle.com/~gseiden/11idoc
Software Requirements Document CRM Release 11*i* Oracle TeleSales	The SRD provides a listing of the software requirements that have been identified for Oracle TeleSales.	http://ots.us.oracle.com
OTS Internal Web Site	Provides links to environments, SRD, design documentation, and schema for Oracle TeleSales.	http://ots.us.oracle.com
CRM-East Web Site	The CRM-East web site on Oracle's intranet provides information on CRM products and miscellaneous links.	http://crmeast.us.oracle.com
CRM Web Site	The CRM web site on Oracle's intranet provides information on CRM products and miscellaneous links.	http://crm.us.oracle.com
Oracle TeleSales Newsgroups	Join the Oracle TeleSales Newsgroups. Excellent forum for exchanging information, critical to the implementation, use and support of Oracle TeleSales.	oracle.corp.crm.info.oracle_telesales oracle.corp.crm.tech.oracle_telesales
BUG and TAR Information	Oracle BUG Database	bug.us.oracle.com

Document	Purpose	Location
Patch Information	Patches are available for download from ARU and/or from MetaLink or TCPatch.	ARU and/or from MetaLink or TCPatch

Setting Up Oracle TeleSales

Overview

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

Navigation

The navigator displays:

- Icon that represents each functional area
- Drop-down lists of views relating to each functional area
- Hierarchical list of functions that relates to the selected view
- Nodes in each hierarchy representing each related record in the database

Chose the functional area an choose a view. Double-click a node to expand the hierarchy. Double-click a data note to open the functional window and display the selected record.

Right-click a node to perform any of the following actions:

- Open the selected functional window
- Conduct a search
- Copy the selected node
- Refresh the list

Implementation Steps

The following table represents a high-level view of all of the steps that you will complete to implement Oracle TeleSales.

Steps

Step Number	Oracle TeleSales Implementation Steps
❏ Step 1	Set Up Value Sets for: ■ Corporate Segments ■ Local Segments **Consideration**: Super User Task
❏ Step 2	Define: ■ Flexfield Segment Qualifiers **Consideration**: Super User Task
❏ Step 3	Define: ■ Accounting Flexfields
❏ Step 4	Define: ■ Period Types ■ Calendar ■ Currency ■ GL Daily Rates **Consideration**: GL Super User Task
❏ Step 5	Define: ■ Set of Books **Consideration**: Optional
❏ Step 6	Define: ■ TeleSales Menus **Consideration**: Super User Task
❏ Step 7	Define: ■ Responsibilities **Consideration**: Super User Task
❏ Step 8	Define: ■ Request Groups **Consideration**: Super User Task

Step Number	Oracle TeleSales Implementation Steps
❑ Step 9	Define: ▪ Job Flexfield **Consideration**: Super User Task
❑ Step 10	Define: ▪ Grade Flexfield **Consideration**: Super User Task
❑ Step 11	Define: ▪ Grades **Consideration**: HR Super User Task
❑ Step 12	Define: ▪ Position Flexfield **Consideration**: Super User Task
❑ Step 13	Define: ▪ Positions **Consideration**: HR Super User Task
❑ Step 14	Define: ▪ Cost Allocation Flexfield **Consideration**: Super User Task
❑ Step 15	Define: ▪ People Group Flexfield **Consideration**: Super User Task
❑ Step 16	Define: ▪ People Groups **Consideration**: Super User Task
❑ Step 17	Define: ▪ Legal Entity Location
❑ Step 18	Define: ▪ HR Organizations **Consideration**: HR Super User Task

Step Number	Oracle TeleSales Implementation Steps
❏ Step 19	Define: ▪ Master Inventory Organization
❏ Step 20	Define: ▪ Inventory Organization
❏ Step 21	Set Up: ▪ GL and HR Profile Option Values
❏ Step 22	Replicate: ▪ Seed Data
❏ Step 23	Define: ▪ Sales Tax Locations Flexfield **Consideration**: Optional
❏ Step 24	Define: ▪ Tax Locations **Consideration**: Optional
❏ Step 25	Define: ▪ Locations
❏ Step 26	Define: ▪ Employees **Consideration**: Super User Task
❏ Step 27	Define: ▪ Application Users **Consideration**: Super User Task
❏ Step 28	Define: ▪ Jobs **Consideration**: Super User Task
❏ Step 29	Define Lookup Codes: ▪ Current Quick Codes ▪ Obsolete Quick Codes **Consideration**: Super User Task

Step Number	Oracle TeleSales Implementation Steps
❏ Step 30	Define: ▪ AR/HZ Quick Codes **Consideration**: Super User Task
❏ Step 31	Define: ▪ Interest Category Sets **Consideration**: Optional
❏ Step 32	Define: ▪ Interest Codes **Consideration**: Super User Task
❏ Step 33	Define: ▪ Interest Types **Consideration**: Super User Task
❏ Step 34	Define: ▪ Interest Status **Consideration**: Super User Task
❏ Step 35	Associate: ▪ Interest Type to Inventory Item **Consideration**: Super User Task (Optional Task)
❏ Step 36	Define: ▪ Units of Measure (UOM) Classes **Consideration**: Super User Task
❏ Step 37	Define: ▪ Units of Measure (UOM) **Consideration**: Super User Task
❏ Step 38	Set Up: ▪ AR Account Tasks/System Options
❏ Step 39	Set Up: ▪ Opportunity/Forecasting ▪ Define Win Probabilies

Step Number	Oracle TeleSales Implementation Steps
❏ Step 40	Set Up: ■ Opportunity/Forecasting ■ Define Sales Stages
❏ Step 41	Define: ■ OM Quick Codes (Sales Channel/Credit Type) **Consideration**: Super User Task
❏ Step 42	Define: ■ Opportunity and Forecasting Profile Options
❏ Step 43	Set Up ■ Forecast Categories
❏ Step 44	Define ■ Party Profile Options
❏ Step 45	Define ■ Common Profiles
❏ Step 46	Set Up: ■ Customer Information Descriptive Flexfield **Consideration**: Super User Task
❏ Step 47	Set Up: ■ Contact Information Descriptive Flexfield **Consideration**: Super User Task
❏ Step 48	Set Up: ■ Lead Grading Mapping **Consideration**: Super User Task
❏ Step 49	Set Up: ■ Duplicate Opportunity Mapping **Consideration**: Super User Task
❏ Step 50	Set Up: ■ Duplicate Lead Qualifiers **Consideration**: Super User Task

Step Number	Oracle TeleSales Implementation Steps
❑ Step 51	Set Up: ▪ Aging Status **Consideration**: Super User Task
❑ Step 52	Set Up: ▪ Reasons to Decline Lead **Consideration**: Super User Task
❑ Step 53	Set Up: ▪ Lead Scorecard **Consideration**: Super User Task
❑ Step 54	Set Up: ▪ Opportunities Descriptive Flexfield **Consideration**: Super User Task
❑ Step 55	Set Up: ▪ Opportunity Lines Descriptive Flexfield **Consideration**: Super User Task
❑ Step 56	Set Up: ▪ Address Information Descriptive Flexfield **Consideration**: Super User Task
❑ Step 57	Set Up: ▪ TeleSales Profiles
❑ Step 58	Define: ▪ Other Profiles
❑ Step 59	Define: ▪ Order Capture Profiles
❑ Step 60	Define: ▪ Scripting Profile Options
❑ Step 61	Define: ▪ JTF Foundation Profile Options

Step Number	Oracle TeleSales Implementation Steps
❑ Step 62	Set Up: ▪ JTF Task Types **Consideration**: Super User Task
❑ Step 63	Define: ▪ Territory Qualifiers
❑ Step 64	Define: ▪ Territory Groups
❑ Step 65	Define: ▪ Territory Types
❑ Step 66	Define: ▪ Territories
❑ Step 67	Define: ▪ Territory Profile Options
❑ Step 68	Define: ▪ Sales Force
❑ Step 69	Define: ▪ Sales Partners
❑ Step 70	Define: ▪ Sales Groups
❑ Step 71	Define: ▪ Partner Relationship Management (PRM) Profile Options
❑ Step 72	Define: ▪ PRM Quick Codes **Consideration**: Super User Task
❑ Step 73	Define: ▪ PRM Attribute Values **Consideration**: Super User Task
❑ Step 74	Define: ▪ Field Sales Online and ensure installation steps are complete.

Step Number	Oracle TeleSales Implementation Steps
❏ Step 75	Set Up: ▪ Quick Menus

Setting Up Oracle TeleSales Users

The set up steps to create a user for Oracle TeleSales are the same as those used and required for creating a user in Oracle Applications. References to the appropriate documentation are listed with each step.

Several advanced options are made available through user profiles and can be set up for an entire site or individual users.

Prerequisites

Successful installation of CRM Family Pack 1.

Steps

Step Number	Set Up Steps
❏ Step 1	Login as System Administrator.
❏ Step 2	Click on the Security item.
❏ Step 3	Click on the User item.
❏ Step 4	Launch the Define form.
❏ Step 5	Click on the User item.
❏ Step 6	Create a new user by entering new user name and password.
❏ Step 7	Go the Person field and select the employee from the LOV. Note: Write down the name of the employee that was just assigned.
❏ Step 8	Assign TeleSales the appropriate responsibility to the user. The options are as follows: ▪ TeleSales Agent ▪ TeleSales Marketing Agent ▪ TeleSales Manager ▪ TeleSales Administrator

Step Number	Set Up Steps
❑ Step 9	Click on the Save icon.
❑ Step 10	Navigate to CRM Foundation > Resource Manager and switch to CRM Resource Manager responsibility.
❑ Step 11	Click on Maintain Resource item.
❑ Step 12	Launch the Import Resources form.
❑ Step 13	Go to the Name field and select the name just assigned from the LOV.
❑ Step 14	Click on Search and select the correct data.
❑ Step 15	Click on the Create Resource button.
❑ Step 16	In the Default Values window, the role of 'TeleSales Agent'.
❑ Step 17	Click OK.
❑ Step 18	In Select Resources, click Save Resource and click on Detail.
❑ Step 19	Go to the Group tab, specify the Group and specify Group Member Role as TeleSales Agent.
❑ Step 20	Click on the Save icon. Note: Follow the above steps to create different users.

Guidelines

When creating and defining a resource, you will define the user as member of a server group. This also establishes the member as belonging to the Interaction Center to which the server group is associated.

Troubleshooting

The following common problems occur if a user is not correctly set up as a Oracle TeleSales user.

- When the user logs on, an error message displays indicating that a Resource ID could not be found. To avoid this problem, ensure that the Oracle TeleSales user has been correctly set up in Oracle HRMS and in Oracle Resource Manager.

References

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

- Oracle Applications System Administrator's Guide, Managing Oracle Applications Security, Users Window, Responsibilities Block
- Oracle CRM Foundation Components Concepts and Procedures Release 11*i*, Using Resource Manager, Creating and Defining Resources
- Oracle CRM Foundation Components Concepts and Procedures Release 11*i*, Using Resource Manager, Defining Resource Groups
- Setting Oracle TeleSales Profile Options

Campaign Rules for Set Up

The following rules need to be followed for setting up campaign data for TeleSales.

> **Note:** Campaign set up is performed in Oracle Marketing Online but is included in the Oracle TeleSales Implementation Guide as a point of reference. For information on other required fields for campaigns, please refer to the Oracle Marketing Online Implementation Guide.

Profile Options

Based View: AMS_P_CAMPAIGNS_V

Prerequisites

Must be performed by System Administrator.

Steps

Step Number	Set Up Steps
❏ Step 1	Campaign rollup type needs to be Execution Campaign.
❏ Step 2	Campaign needs to be Public.
❏ Step 3	Campaign cannot be Template.
❏ Step 4	Campaign needs to have a channel assigned to it.

Collateral Rules for Set Up

The following rules need to be followed for setting up collateral data for TeleSales.

Note: Set up of collateral is performed in Oracle Marketing Online but is included in the Oracle TeleSales Implementation Guide as a point of reference. For information on other required fields for collateral, please refer to the Oracle Marketing Online Implementation Guide.

Profile Options

Based View: AMS_P_DELIVERABLES_V

Prerequisites

Must be performed by system administrator.

Steps

Step Number	Set Up Steps
❏ Step 1	The collateral needs to be either Physical or Electronic item.
❏ Step 2	If the collateral is a Physical item, it needs to be set as Fulfill Physically.
❏ Step 3	If the collateral is an Electronic item, it needs to be set as Fulfill Electronically.

Event Rules for Set Up

The following rules need to be followed for setting up event data for TeleSales.

Note: Event set up is performed in Oracle Marketing Online but is included in the Oracle TeleSales Implementation Guide as a point of reference. For information on other required fields for events, please refer to the Oracle Marketing Online Implementation Guide.

Profile Options

Based View: AMS_P_EVENT_OFFERS_V

Prerequisites

Must be performed by system administrator.

Steps

Step Number	Set Up Steps
❏ Step 1	An AOL user must be set up with a valid employee_ID, resource_ID, and salesrep_ID. Make sure two profile values are set to Yes for the AOL user.
❏ Step 2	Log on as System Administrator.
❏ Step 3	From the profile/system, query the AMS%.
❏ Step 4	The following profile values need to be set to **Yes**: ▪ Should call to inventory modules to be made? ▪ Should call to pricing modules to be made?
❏ Step 5	Create an event from Oracle Marketing's (OM) web page. Note: You will need a URL and account from OM.
❏ Step 6	Create a rollup event from OM.
❏ Step 7	Create an execute event from OM under the rollup event from above.
❏ Step 8	In order to register an event and create an order from the 'Registration': ▪ The maximum size of the event needs to be set up to be greater than 0. ▪ Enter the inventory item name. ▪ Set up the price.
❏ Step 9	From Publish Notes, create notes information for the user to select from the Event Detail window.
❏ Step 10	The campaign selected for an event needs a channel_ID and media_ID attached.

Universal Work Queue Rules for Set Up

The following rules need to be followed for setting up Universal Work Queue in any environment for TeleSales.

Prerequisites

Must be performed by system administrator.

Steps

Step Number	Set Up Steps
❏ Step 1	Log on as System Administrator.
❏ Step 2	Select System Administrator responsibility.
❏ Step 3	Go to the Profile menu.
❏ Step 4	Go to the System submenu.
❏ Step 5	On the window type 'IEU%' on the Profile textbox.
❏ Step 6	Click the Find button.
❏ Step 7	The following list of profiles will display. ■ IEU: Queue: Defects ■ IEU: Queue: Enhancements ■ IEU: Queue: Forecasts ■ IEU: Queue: Inbound Mail ■ IEU: Queue: Inbound Telephony ■ IEU: Queue: Leads ■ IEU: Queue: Opportunities ■ IEU: Queue: Outbound Telephony ■ IEU: Queue: Service Requests ■ IEU: Queue: Tasks ■ IEU: Queue: Web Callback ■ IEU: Queue: Web Collaboration
❏ Step 8	At the site level, set the profile options that are not needed to **No**.

Order Capture Items for Set Up

Profile options can be set for the following Order Capture items.

Note: Order Capture items are set up in Oracle Capture and are included in the Oracle TeleSales Implementation Guide as a point of reference. For information on other required fields, please refer to the Oracle Order Capture Implementation Guide.

Existing Profile Options

ATP = ASO_AUTOMATIC_ATP_CHECK

Single Payment = ASO_DEFAULT_PAYMENT_OPTION

Prerequisites

Must be performed by system administrator.

Items

Item Number	Item type
❏ Item 1	Freight Terms
❏ Item 2	Bill to Address
❏ Item 3	Ship to Address
❏ Item 4	End User Address
❏ Item 5	Quote to Address Note: For Items 1-5, Order Capture will currently default to what Oracle TeleSales passes to Order Capture via Quick Menu. If nothing is passed, Order Capture will default to the primary addresses specified in customer.
❏ Item 6	Party Type (person, organization, relationship, group). Note: The party type that will be used by Order Capture will be that which is passed to Order Capture from Oracle TeleSales.
❏ Item 7	Sales Representative
❏ Item 8	Party Name
❏ Item 9	First Name
❏ Item 10	Last Name

Item Number	Item type
❏ Item 11	Phone Note: For Items 7-11, Order Capture will use the information passed from Oracle TeleSales.
❏ Item 12	Payment Term (30 days, etc.)
❏ Item 13	Payment Type (credit card, etc.)
❏ Item 14	Order Type (ship or no-ship)
❏ Item 15	Quote name (editable in Order Capture)

Lookup (Quick) Codes Set Up

The following is a list of the lookup codes (both current and obsolete) that apply to Oracle TeleSales.

> **Note:** Event set up is performed in Oracle Marketing Online but is included in the Oracle TeleSales Implementation Guide as a point of reference. For information on other required fields for events, please refer to the Oracle Marketing Online Implementation Guide.

Profile Options

Based View: AMS_P_EVENT_OFFERS_V

Prerequisites

Must be performed by system administrator.

Reference

Refer to BR100 - Application Setup / Global Application Set Up for Oracle TeleSales 11*i* and Oracle Sales Online 11*i* and Partner Relationship Management 11*i* for detailed information about the lookup codes.

Current Quick Codes

CodeType	Description
❏ Access_Privilege	Access privilege for an employee.

CodeType	Description
❑ Access_Type	Type of access generated for an access record.
❑ Activity_Type	
❑ Amount_Scaling	
❑ AS_PLAN_ELEMENT_TYPE	Mapping type for Quote of Interest Types.
❑ AST_AGING_ACTIONS	
❑ AST_ATA_RUN_MODE	Run Mode for Territory Assignment concurrent program.
❑ AUTO_ASSIGNMENT_TYPE	Automatic Assignment Type.
❑ BUDGET_AMOUNT	
❑ BUDGET_STATUS	Status of a prospect's budget.
❑ CLOSE_REASON	Opportunity close reason.
❑ DATE_FORMAT	
❑ DECISION_TIMEFRAME	Time period during which it is expected a decision on a deal will be made.
❑ FLAG	Used in the system for Yes/No decision LOVs.
❑ IMPORT_TYPE	Import type for sales.
❑ INTERACTION_TYPE	Interaction type.
❑ ISSUE	Issue related to a lead or opportunity.
❑ LEAD_CONTACT_ROLE	Role of a contact involved in a lead.
❑ LEAD_SOURCE	Delivery method of a lead.
❑ MC_DATE_MAPPING_TYPE	Start date or end date of a period for pseudo period rates.
❑ METHODOLOGY_TYPE	Opportunity Methodology Type
❑ OPP_PROBABILITY_LINK	Probability and sales stage are linked either with a hard link or a soft link.
❑ PLAN_ELEMENT_MAPPING	Sales Categories mapping with Sales Quotas (Sales Online (CN)).

CodeType	Description
❏ RANK	
❏ REPORTING_CURRENCY	Reporting currencies for Sales Credits denorm table.
❏ ROLE_TYPE	Role type.
❏ SALES_LEAD_STATUS	Status of lead.
❏ UPDATE_ACCESS	Update Access.
❏ VEHICLE_RESPONSE_CODE	

Obsolete Quick Codes

Code Type	Description
❏ AST_LEAD_DECLINE_REASONS	
❏ AST_LEAD_QUAL_STATUS	
❏ AST_SCALING_FACTOR	
❏ REJECT_REASON_CODE	
❏ CONTACT_RANK_ON_OPPORTUNITY	Rank of a contact involved in an opportunity.
❏ LEAD_STATUS	Status on a lead.
❏ SALES_LEAD_RANK	Rank of a sales lead.
❏ TODO	To do activities.

AR/HZ Quick Codes

Code Type	Description
❏ COMMUNICATION_TYPE	
❏ CONTACT_TITLE	Titles for contact persons at customer sites.
❏ CUSTOMER_CATEGORY	Sales and marketing categories for customers.

Code Type	Description
❏ DEPARTMENT	Department.
❏ DEPARTMENT_CODE	Standard department code for contacts.
❏ RANK	Contact rank.
❏ RESPONSIBILITY	Job titles for customer contact.

OM Quick Codes

Code Type	Description
❏ SALES_CHANNEL	Sales Channels.
❏ SALES_CREDIT_TYPE	Sales Credit Type

PRM Quick Codes

Code Type	Description
❏ PRM_ASSIGNMENT_TYPE	Type of assignment opted for when putting a lead out to a partner(s).
❏ PRM_IDN_CLASSIFICATION_TYPE	
❏ PRM_LEAD_TYPE	
❏ PRM_CHANNEL	
❏ PRM_SIC_CODES	

Setting Up Quick Menu

Quick Menu is based on seeded filters. Filters have a many to many relationship with AOL functions are seeded in the Quick Menu tables. This section defines the association of the filter with its function in AOL.

Note that you use the Application Developer responsibility for setting up quick menu unless otherwise indicated. Setting up the Quick Menu involves:

- Verifying AOL Menu for Quick Menu
- Adding Form Function to Your Responsibility

- Changing System Profile Value
- Using Seed Filter Values
- Using Seed Filter Functions

This section provides general guidelines for adding modules to the Oracle TeleSales quick menu. You must customize the individual forms and functions and want to link to the quick menu and then complete the following procedures to call these form functions.

Verifying AOL Menu for Quick Menu

To verify an AOL menu for quick menu, perform the steps as outlined below.

Steps

Step Number	Set Up Steps
❏ Step 1	Open the Menus window using the following navigation path: Application- >Menu
❏ Step 2	Run a query to open the seeded menu
❏ Step 3	Close the window

Adding Form Function to Your Responsibility

The Quick Menu has already been added to the TeleSales responsibility. However, in order to leverage the quick menu functionality for other responsibilities, you would have to add the form function.

To add form function to a responsibility, perform the steps as outlined below.

Steps

Step Number	Set Up Steps
❏ Step 1	Open the Menus window using the following navigation path: Application- >Menu
❏ Step 2	Run a query to open the responsibility you want to link to the Quick Menu.
❏ Step 3	Add the quick menu function to the responsibility.

Step Number	Set Up Steps
❑ Step 4	Save your work.

Changing System Profile Value

You should use the System Administrator responsibility for changing profile values. To change the profile values, perform the steps as outlined below.

Steps

Step Number	Set Up Steps
❑ Step 1	Open the System Profile Values window using the following navigation path: Profile- >System
❑ Step 2	Set a user menu name.
❑ Step 3	Customize the menu.

Using Seed Filter Values

Oracle TeleSales provides predefined filters.

Using Seed Filter Functions

Oracle TeleSales provides predefined filter functions.

Steps

Step Number	Set Up Steps
❑ Step 1	Open the Menus window using the following navigation path: Application- >Menu
❑ Step 2	Run a query to open the seeded menu.
❑ Step 3	Close the window.

Oracle TeleSales Administration Tasks

Overview

There are several tasks that are required to be completed for the administration of Oracle TeleSales.

Steps

Step Number	Set Up Steps
❏ Step 1	Assign TeleSales Agent Responsibility
❏ Step 2	Set Up New Sales Groups
❏ Step 3	Add/Remove Members from Existing Sales Groups
❏ Step 4	Modify/Assign Roles to Resources
❏ Step 5	Create User Accounts
❏ Step 6	Set Up Marketing Data (Campaigns, Collateral, Events
❏ Step 7	Assign Agents to Campaigns
❏ Step 8	Create Outcomes, Reasons, and Results
❏ Step 9	Assign Results and Reasons to Outcomes
❏ Step 10	Assign Outcome Results and Reasons to Campaigns
❏ Step 11	Set Up Ranking Information
❏ Step 12	Set Up Scoring Information
❏ Step 13	Call Wrap Up Assignment
❏ Step 14	Web Directory Assistance Administration
❏ Step 15	Phone Directory Assistance Administration
❏ Step 16	Leads Administration

Creating User Accounts

Use the steps outlined below to create user accounts.

Steps

Step Number	Set Up Steps
❑ Step 1	Select File > Switch Responsibility.
❑ Step 2	Select System Administrator from the Responsibilities window.
❑ Step 3	Navigate to Security > User > Define The Users window will display.
❑ Step 4	Enter a name for the user in the User Name field. Use the standard naming convention and include country code. Note: If the name entered is already in use, an error message will display requesting a different name to be entered.
❑ Step 5	Press Tab key.
❑ Step 6	Click on the Person field to match the newly created user name to an existing resource in the system.
❑ Step 7	Click the LOV icon to identify a match.
❑ Step 8	Click on Password.
❑ Step 9	Enter the chosen password.
❑ Step 10	Press Tab key.
❑ Step 11	Enter the password again to set it as the default.
❑ Step 12	Save the changes. Note: Once an account is created for a user, a responsibility must be assigned.

Assigning TeleSales Responsibilities to User Accounts

Responsibilities are defined once user accounts are created. Assign TeleSales responsibilities to users as outlined in the following steps.

Steps

Step Number	Set Up Steps
❑ Step 1	Log in to Oracle Applications and select the System Administrator responsibility

Step Number	Set Up Steps
❏ Step 2	Select the Security menu
❏ Step 3	Select User
❏ Step 4	Select Define
❏ Step 5	Use the following steps for each user that you want to assign to the TeleSales Agent responsibility. **Note**: If you have existing users, then skip steps 6-9 and proceed to step 10.
❏ Step 6	After the Users screen appears, enter the new <user name>. For example: "TS_USER1"
❏ Step 7	Enter "TS_USER1" into the Description field (This can be whatever you want).
❏ Step 8	Enter the user's employee name in the Person field.
❏ Step 9	Enter a applications login password. Confirm your password by retyping it. Record your password for subsequent log ins.
❏ Step 10	Create a new record in the Responsibility region
❏ Step 11	In the Responsibility field enter "Tele%" and press **Enter**. The following responsibility types should appear in the Responsibility list: ▪ TeleSales Agent ▪ TeleSales Marketing Agent ▪ TeleSales Manager ▪ TeleSales Administrator
❏ Step 12	Select the appropriate TeleSales responsibility.
❏ Step 13	Select Action and then Save.
❏ Step 14	Test the login to the application.

Assigning Resources to Roles

An administrative function in Oracle TeleSales is to assign resources to roles. Use the following steps to assign resources.

Steps

Step Number	Set Up Steps
❑ Step 1	Log into Form Server and select Oracle TeleSales Administrator responsibility.
❑ Step 2	Navigate to CRM Foundation > Resource Manager > Maintain Resources.
❑ Step 3	Click on Resources. The Find Resources window will display.
❑ Step 4	At the Category field, enter employees to begin the search.
❑ Step 5	Press Tab key.
❑ Step 6	Click on the name LOV to display a list of resources. Using either the find search capability (i.e., %adams%) or scroll up/down to find the resource (i.e., employee).
❑ Step 7	Select the resource and return to the Find Resource window.
❑ Step 8	Click on Resource Details button.
❑ Step 9	Assign the appropriate role/role type to the employee based on the business requirements. ■ Role Type = TeleSales ■ Role = TeleSales Agent or TeleSales Manager Note: TeleSales Managers need both the TeleSales Agent and TeleSales Manager resources assigned to them. This is needed in order to establish and set up the hierarchy.
❑ Step 10	Save the definition and close the form.

Defining Groups

Use the following steps to define groups for resources.

Steps

Step Number	Set Up Steps
❑ Step 1	Navigate to CRM Foundation > Resource Manager > Maintain Resources > Groups. The Define Group window will display.

Step Number	Set Up Steps
❏ Step 2	In the Name field, perform one of the following options: ■ Search for an existing sales group by clicking on the flashlight icon. Perform this option when new members need to be added to an existing group. ■ Define a new group by entering a name. Use the standard naming convention. Note: To avoid entering duplicate group names, the recommendation is to do a 'Find' first to make sure the new group name is not already defined in the system.
❏ Step 3	Add/modify group members. Enter the following: ■ Category = Employee ■ Number = Click on LOV to display the list of names.
❏ Step 4	Click on the Member Details button to verify role information.
❏ Step 5	Select the Usage tab.
❏ Step 6	Enter Sales and TeleSales as the usage for the group.
❏ Step 7	Select the Relations tab to define any parent/child group relationships associated with the group. Note: Currently there is one relation type available, 'Parent Group'. This means only the parent of the selected group is available to be defined. You will not be able to view or select child groups.
❏ Step 8	Save additions/modifications and close the form.

Resetting Passwords

The steps listed below are used to reset a password for an existing account.

Steps

Step Number	Set Up Steps
❏ Step 1	Log into the Form Server using the System Administrator responsibility.
❏ Step 2	Navigate to Security > User > Define.

Step Number	Set Up Steps
❑ Step 3	Find the account by using either User Name field or Person field.
❑ Step 4	Click on Password.
❑ Step 5	Enter the chosen password.
❑ Step 6	Press Tab key.
❑ Step 7	Enter the password again to set it as the default.
❑ Step 8	Save the changes.
❑ Step 9	Test the login to the application.

Setting Profile Options

Oracle applications let you set up your applications according to your company's business requirements. System profiles define how an application behaves. The procedure for setting up and changing profile options is the same for all Oracle applications.

Overview

- This section provides a list of the system profile options used by Oracle TeleSales. These profile options are by themselves not sufficient to set up the application.

Steps

Step Number	Set Up Steps	Required?	Window Name(s)
❑ Step 1	Set or Change Profile Options	Required	Navigator
❑ Step 2	Enter search criteria in the Display region	Required	Find System Profile
❑ Step 3	Enter a partial name of the profile in the Profile field using "%" as a wild card. Click Find.	Required	Find System Profile
❑ Step 4	Click in the field for the profile option you wish to set.	Required	Find System Profile

Step Number	Set Up Steps	Required?	Window Name(s)
❏ Step 5	Enter the value from the LOV.	Required	Find System Profile
❏ Step 6	Click Save on the toolbar	Required	Find System Profile

Guidelines

Each profile options listed includes a checklist of the levels at which they can be set and whether they are visible to the user.

Profile options can be set at four different levels.

- **Site**
- **Application**
- **Responsibility**
- **User**.

Each profile option is organized in a table that identifies the following:

- **Required**: Indicates whether the profile option is required to be set. The Value is either **Yes** or **No**.
- **User Can**: Indicates whether the user will be able to view or update the profile information. For either **View** or **Update** the value is either **Yes** or **No**.
- **Admin Setting 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**.
    - **Global:** Indicates whether the profile option can be set at the global level. 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**.

- **Setting**: The access privilege available for assigning to the profile option is listed. A description as well as usage considerations are provided. The Value is either **Territory**, **Full**, or **Prospecting**.
- **Default Value**: The default value for the profile option is identified.

References

Refer to Oracle Applications System Administrator's Guide for a detailed description of the System Profile procedure.

OTS: Amount Scaling Factor

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Contact Name Required to Define a Duplicate Opportunity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Contact Role

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Considerations**						
Default Value							

OTS: Creation Date Define Duplicate Opportunity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Considerations**						
Default Value							

OTS: Currency Code

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
	Yes	Yes	Yes			Yes	Yes
Setting	**Description and Usage Considerations**						
	This profile option is used to specify your default currency for new leads and promotions. If you set this profile option Oracle TeleSales defaults the value into the Currency field when you are creating new leads, and new promotions such as advertisements, collateral, and events.						
Default Value							

OTS: Currency Define Duplicate Opportunity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Customer Key Word Count (TeleSales Lookup)

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
	No	No	Yes				

Setting	Description and Usage Considerations
	This profile option is used to specify the number of words from the customer name that Oracle TeleSales uses to build customer keys. This profile option is used with several others to facilitate TeleSales lookup.
Default Value	

OTS: Daily Conversion Type

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	Currency conversion type used as the daily rate for currency conversions in opportunity pipeline. The LOV is from GL Daily Conversion Types.
Default Value	

OTS: Date Mapping Type for a Period for Pseudo Period Rates

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Consideations**						
	The start date of a period "**S**" and end "**E**" day of the period used for Oracle TeleSales and General Ledger daily rate mappings.						
Default Value							

OTS: Debug

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Considerations**						
Default Value							

OTS: Default Country

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Considerations**						
Default Value							

OTS: Default Party Type

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Default Person Title

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Default Phone Line Type

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Dup Opportunity Role

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Quote Form

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Relationship

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Default Site Use Code

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Event Administrator

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
	Yes	No			Yes		

Setting	Description and Usage Considerations

Yes or **No**	This profile option, set at the user level designates whether the user has event administrator responsibilities. The default setting is **No** meaning that administrator privileges are not extended to everyone. When the Event Administrator function is set to **Yes**, the user gains access to event administrator menus and functions. If you are designated as the Event Administrator, you can query up statistical information about planned events that others cannot see. Only the Event Administrator can do the following: ▪ Update the number of people attending an event. ▪ Increase the number of people enrolled regardless of status. ▪ Create accounts and/or contacts if the person is a walk-in participant in an event. ▪ Go to an evaluation script from a roster. ▪ Update the enrollment status to any status available. Only the Event Administrator can change the status from *waitlisted* to *enrolled*. Since this role does have unique privileges that prevent confusion and arbitrary changing of valuable information, it is key that one person be assigned the responsibility.
Default Value	No

OTS: Event Code System Flag

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
	No		Yes				

Setting	**Description and Usage Considerations**

Yes or **No**	Use this profile option if you want your event codes to be system generated. The following values are available to you: ▪ **Yes**: Oracle TeleSales automatically generates your event codes. Automatically generated event codes are numeric. ▪ **No**: Oracle TeleSales does not automatically generate your event codes. You must manually enter an event code that is unique across all Oracle TeleSales promotions. Manually entered event codes can be numeric or character based.
Default Value	

OTS: Event Facility Code System Flag

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
	No	No	Yes				

Setting	Description and Usage Considerations
Yes or **No**	Use this profile option if you want your event facility codes to be system generated. The following values are available to you: ▪ **Yes**: Oracle TeleSales automatically generates your event facility codes. Automatically generated event facility codes are numeric. ▪ **No**: Oracle TeleSales does not automatically generate your event facility codes. You must manually enter a unique event facility code. Manually entered event facility codes can be numeric or character based.
Default Value	

OTS: Generate Collateral Activity

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations

Default Value	

OTS: Generate Contact Activity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Generate Customer Activity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Generate Event Activity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

Default Value	

OTS: Generate Lead Activity

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Default Value	

OTS: Generate Opportunity Activity

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Default Value	

OTS: Generate Opportunity System Notes

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
			Yes				

Setting	**Description and Usage Considerations**

Yes or **No**	The default value of **Yes** generates a system note each time there is a change in opportunity status. This includes changes in status, win probability, sales stage, and close date (at the header or line level). Set to **No** to prevent the generation of these notes to prevent buildup of notes within the system when opportunity status changes frequently.
Default Value	Yes

OTS: Initial eBusiness, Opportunity, and Leads Region

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	This profile sets which Oracle TeleSales eBusiness, Opportunity, and Leads regions appears on top when the user launches a selection. Use the LOV to set this profile.
Default Value	

OTS: Identifying Address Flag

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Lead Aging Abandon - Action

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Lead Aging Days to Abandon

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Lead Aging No Action - Action

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Lead Budget Status

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This option sets the default of the lead budget status for new leads created in the Leads Center in Oracle TeleSales. Users set the possible values in the Lead Status Quick Code.
Default Value	None defined

OTS: Lead Contact Role

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This options sets the default of the lead contact role for new leads created in the Lead Center within Oracle TeleSales. Users set the possible values in the Lead Contact Role Quick Code.
Default Value	None defined

OTS: Lead Decision Time Frame

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

	This option sets the default of the lead decision time frame for new leads created in the Lead Center within Oracle TeleSales. Users set the possible values in the Decision Time Frame Quick Code.
Default Value	None defined

OTS: Lead Qualification Budget Status

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Lead Qualification Campaign Code

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Lead Qualification Channel

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Default Value	

OTS: Lead Qualification Contact Phone

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Lead Qualification Contact Role

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Lead Qualification Project Name

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

Default Value	

OTS: Lead Qualification Status

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Lead Qualification Time Frame

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Lead Qualification Total Budget

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Default Value	

OTS: Lead Qualifier Status

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Lead Rank Code

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	This option sets the default rank for new leads created in the Leads Center within Oracle TeleSales. Users set the possible values in the Lead Rank Quick Code.
Default Value	None defined

OTS: Lead Status Code

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

	This option sets the default status for new leads created in the Leads Center within Oracle TeleSales. Users set the possible values in the Lead Status Quick Code.
Default Value	None defined

OTS: Leads Aging No Action

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
Default Value	

OTS: Make Job Title Code Required

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
Y or **N**	This profile option influences the Job Title Code field contained in the Contact tab in the eBusiness Center window. If the default value of **N** is changed to **Y**, the Job Title Code field becomes mandatory and you cannot save a contact record without filling in the field. If your organization routinely uses this field, set the field to **Y**, otherwise maintain the default setting.
Default Value	N

OTS: Managing Employee Has Access

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
	No	No	Yes				

Setting	Description and Usage Considerations
Yes or **No**	This profile option defines whether the employee listed as the Managing Employee for a partner can access the partner's accounts. If you accept the default **Yes** setting, then the managing employee designated on the Sales Partner record can view the account information for that sales partner. If **No** is selected, a managing employee cannot access sales partner account information.
Default Value	Yes

OTS: Max Interactions Displayed

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Max Number of Collateral Items

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

	This profile option to control the number of collateral pieces that you can include in any one collateral request. Oracle TeleSales does not allow you to save a collateral request if you have selected more pieces than the maximum number defined for you. When determining whether the maximum has been reached the system counts a Public Collateral Kit as one collateral item. However, for Private Collateral Kits, each item in the kit counts against the maximum.
Default Value	100

OTS: Maximum Roll Days for Converting Amount

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	This profile option is used to set the number of days back the system can look for missing daily conversion rates. When a daily conversion rate is missing setting this profile to a positive number allows the system to look back that many days to the most recent defined rate. A negative number will cause the system to look for a conversion rate without any date limit.
Default Value	

OTS: Multiple Sales Currency Enabled

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	This profile option is used to support multi-currency capabilities.

Default Value	

OTS: NOHANGUP_ON_END

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Default Value	

OTS: Notes Interaction Activity

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Default Value	

OTS: OFS Customer Long Name

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Yes or **No**	If this Oracle TeleSales-specific profile is set to **Yes**, then an additional company name field labeled Long Name appears below the standard customer name field on the following windows: ■ Create Prospect ■ Customer Detail The additional field can contain up to 320 characters.
Default Value	

OTS: OFS Default Business Line

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Considerations**						
	This profile option determines the default business line used for new opportunities. The specific values you enter here via the List of Values (LOV) are: ■ Customer ■ Prospect						
Default Value	None defined						

OTS: OFS Default Channel

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
Setting	**Description and Usage Considerations**						

	This profile option determines the default channel for new opportunities. The specific values you enter here via the List of Values (LOV) are: ▪ Direct ▪ Indirect
Default Value	None defined

OTS: OFS Default Close Date Days

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Integer value	This profile option determines the number of days ahead to default the close date for new opportunities. You may enter any number of days.
Default Value	None defined

OTS: OFS Default Responsibility

	User can		**Admin Setting Levels**				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	This profile option determines the default login responsibility for users. Oracle TeleSales ships with three responsibilities: ▪ Oracle TeleSales ▪ Oracle TeleSales Manager ▪ Oracle TeleSales VP
Default Value	None defined

OTS: Opportunity Number Define Duplicate Opportunity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Opportunities Per Page

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This profile option determines how many rows of opportunities a user sees on the screen at any given time. You may enter any number.
Default Value	

OTS: Opportunities Sort by

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

None Customer Name Opportunity Name Opportunity Amount Close Date Status Win Prob Sales Stage	This profile option determines the first sorting option for sorting opportunities.
Default Value	

OTS: Opportunities Sort Then by

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
None Customer Name Opportunity Name Opportunity Amount Close Date Status Win Prob Sales Stage	This profile option determines the second sorting option for sorting opportunities.
Default Value	

OTS: Opportunity Purchase Item Rollup

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
Yes or **No**	This profile option must be set only if your installation uses both Oracle TeleSales and Oracle Sales Online and has decided to forecast on the header level (by the whole opportunity) rather than by individual purchase line items. Possible settings: ■ **Yes**: Forecasts are done on the opportunity as a whole. The application sums up the purchases and rolls-up the values entered by sales representatives for individual line items in the sales stage, win probability, status, close date, and sales channel fields. ■ **No**: The application does not roll-up individual line items. Forecasts are based on individual line items rather than the opportunity as a whole.
Default Value	

OTS: Opportunity Competitor Entry

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
	No	No	Yes				

Setting	Description and Usage Considerations
	Use this profile option to determine whether the user enters free text to define a competitor or selects from a list of values. Choose Validate if you want entries to be checked against a predefined list of values.
Default Value	Free text

OTS: Opportunity Delete Ceiling

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
		No	Yes				

Setting	Description and Usage Considerations

	This options, expressed as a percent, is a ceiling at which a teleagent can delete an opportunity within the Opportunity Center. If the account has progressed past a certain level of "win probability", the teleagent is not able to delete the opportunity. Also, the teleagent cannot adjust the win probability down below the ceiling so that it can then be deleted.
Default Value	Not defined

OTS: Opportunity Issue Entry

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
			Yes		Yes		

Setting	**Description and Usage Considerations**
	This profile option is used to specify whether a user enters free text or chooses from a list of values to record issues that may be a factor in winning an opportunity.
Default Value	

OTS: Opportunity Probability Link

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
	No	No	Yes				

Setting	**Description and Usage Considerations**
Warning or **Error**	This option defines whether a user receives a warning message or an error message when entering a win probability that does not match the expected sales stage of the opportunity. The default setting, *warning*, sends a warning message to the screen, but lets the user enter an unexpected win probability. If this profile is set to *error*, the user is not able to enter a win probability that is not consistent with the sales stage.

Default Value	Warning

OTS: Opportunity Status Override

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Yes or **No**	This profile defines whether the user can change the status of an opportunity. If set to **No**, the Status field updates automatically, and only when the win probability changes. Win probabilities, sales stages, opportunity statuses, and the relationships between them are defined by the ***Oracle Sales Super User under Opportunity Setup***.
Default Value	

OTS: Primary Contact Role Flag

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Project Name Define Duplicate Opportunity

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
Default Value	

OTS: Promotion Define Duplicate Opportunity

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Quote Automatic Numbering

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This profile setting determines whether quote numbers are automatically generated by the system.
Default Value	None defined

OTS: Quote Conversion Type

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	Conversion type for getting daily conversion rate.
Default Value	

OTS: Quote Discount Privilege

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	Discounting privilege for manual discount in quotes.
Default Value	

OTS: Quote Duration

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	Time duration of how long a quote remains valid.
Default Value	

OTS: Quote GSA Check

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

	Flag to determine checking for GSA violation when pricing quote items.
Default Value	

OTS: Quote Letter

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	Identifier for quote cover letter printing.
Default Value	

OTS: Quote Letter Format

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	Defines the format to use when printing a quote.
Default Value	

OTS: Quote Limit Price List

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
	Flag that determines whether a limited set of price lists should be used.

Default Value	

OTS: Quote Order Entered State

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
	The state of orders when converted from quotes.
Default Value	

OTS: Quote Order Source

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
	Order source for orders that is converted from quotes.
Default Value	

OTS: Quote Order Type

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
		Yes					

Setting	Description and Usage Considerations
	Setting this profile option to that which can be updated by a user makes it possible for users to change an order type using the Personal Profile Values form.

Default Value	

OTS: Quote Organization

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	The organization entering quotes.
Default Value	

OTS: Quote Use Order Entry

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This profile option indicates whether Oracle Order Entry is used for order fulfillment for quotes.
Default Value	None defined

OTS: Quotes Use Receivables Tax

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This profile option indicates whether Oracle AR Tax Engine is used during the generation of quotes.

Default Value	None defined

OTS: Rank Lead Option

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations

Default Value	

OTS: Rank Lead Option System

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations

Default Value	

OTS: Role Define Duplicate Opportunity

Required	User can		Admin Setting Levels				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations

Default Value	

OTS: Sales Team Creator Keep Flag

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
Yes or **No**	This profile option determines whether a sales team member assigned to an account or an opportunity will be kept as a sales team member regardless of the assignment made by the territory assignment program. This profile option defaults the Keep check box next to each sales team member. ■ **Yes**: Defaults the Keep check box to checked next to each team member and keeps the sales team member regardless of the assignment made by the territory assignment program. ■ **No**: Defaults the Keep check box next to each team member to unchecked and allows the territory assignment program to over-ride the sales team assignments.
Default Value	None defined

OTS: Scripting Database SID

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting Embedded

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting Installation

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting JNDI

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting Port

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting Server Host Name

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting Three Tier

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Scripting Uses AOL User

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	

OTS: Search Cutoff Number

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This profile option improves application performance by forcing user to enter more specific query terms. If the number of records that would be returned in a search exceeds the specified value, then the search stops and a dialog box asks the user to restrict a search further by entering more search criteria. By default, this profile option is set to 100.
Default Value	100

OTS: Show Profile

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

Default Value	

OTS: Site Use Code

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp
			Yes		Yes	Yes	Yes

Setting	Description and Usage Considerations
	This profile specifies a site that Oracle TeleSales uses as a default in the Usage field when you query the Find Account form for an account or contact. Accounts created in Oracle TeleSales are not assigned a site use until any of these three conditions occur: ■ Collateral is ordered by a contact at the account ■ Site use is set to Oracle Marketing ■ An order for the account is entered in Oracle Order Entry The list of values for this profile option is owned by Oracle Order Entry. So, for example, if you have several sites for a specific account, the default address for that account, as listed in Order Entry, is defaulted into the list of values within Oracle TeleSales.
Default Value	None defined

OTS: TeleSales Interaction Enabled

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations

Default Value	

OTS: TeleSales Scripting Installed

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Total Amount Define Duplicate Opportunity

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**
Default Value	

OTS: Turn Prospect into Customer at Order Time

	User can		Admin Setting Levels				
Required	**View**	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**

Setting	**Description and Usage Considerations**

Yes or **No**	This profile option allows you to indicate whether a prospect can be turned into a customer at the time an order is created. ■ **Yes:** Oracle TeleSales can turn a prospect into as customer at the time of creating an order for the prospect. The flag in the Customers table will change from prospect to customer when an order is placed. ■ **No:** Oracle TeleSales cannot turn a prospect into as customer at the time of creating an order for the prospect. The flag must be manually changed from prospect to customer when an order is placed. You might want to set this profile option to **No** if you want to build in the security that the receivables department has to do a credit check before a prospect can start placing orders.
Default Value	

OTS: Use Customer Keys

Required	**User can**		**Admin Setting Levels**				
	View	**Update**	**Site**	**Global**	**User**	**Appl**	**Resp**
	No		Yes				

Setting	**Description and Usage Considerations**
Yes or **No**	This profile option controls whether Oracle TeleSales uses customer, address and contact keys when searching for an account or contact. Using customer keys can lessen the possibility of creating duplicate entries in the database. Oracle TeleSales generates keys when you create new customers, accounts, and contacts and when you run the Generate Customer Keys concurrent process. The following values are available to you: ■ **Yes:** Oracle TeleSales uses the keys when performing a query from the Find Account or Contact window. ■ **No:** Oracle TeleSales does not use the keys when performing a query in the Find Account or Contact window.
Default Value	

OTS: Use Inventory Items

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Yes or **No**	This profile option notifies Oracle TeleSales that Oracle Inventory is being used as the method for which collateral will be fulfilled. When set to **No**, Oracle TeleSales does not process collateral from Oracle Inventory.
Default Value	Yes

OTS: UWQ Advanced Inbound Integration

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	Yes

OTS: UWQ Advanced Outbound Integration

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
Default Value	Yes

OTS: Volume Forecasting Enabled

Required	User can		Admin Setting Levels				
	View	Update	Site	Global	User	Appl	Resp

Setting	Description and Usage Considerations
	This profile option determines whether your site can use the volume forecasting feature.
Default Value	None defined

Other Profile Options

The following table lists the profile options of other applications that must be defined for the implementation of Oracle TeleSales.

Reference

Detailed information for each of these profiles is included in the BR100 for Oracle TeleSales. Refer to that document for additional information.

Profile Name	Description
ASO: Advanced Inbound Installation	Profile option is used to define and set up order capture.
ASO: Advanced Outbound Installation	Profile option is used to define and set up order capture.
ASO: Automatic ATP Check	Profile option is used to define and set up order capture.
ASO: Automatic ATP Check for Number of Items	Profile option is used to define and set up order capture.
ASO: Automatic Numbering	Profile option is used to define and set up order capture.
ASO: Configurator URL	Profile option is used to define and set up order capture.
ASO: Credit Card Authorization	Profile option is used to define and set up order capture.

Profile Name	Description
ASO: Default Currency Code	Profile option is used to define and set up order capture.
ASO: Default Order State	Profile option is used to define and set up order capture.
ASO: Default Ordered Qty in OC UI	Profile option is used to define and set up order capture.
ASO: Default Payment Option	Profile option is used to define and set up order capture.
ASO: Default Person ID	Profile option is used to define and set up order capture.
ASO: Default Quote Status	Profile option is used to define and set up order capture.
ASO: Default Sales Rep	Profile option is used to define and set up order capture.
ASO: Enable Line Payments	Profile option is used to define and set up order capture.
ASO: Enable Split Payment	Profile option is used to define and set up order capture.
ASO: Enable Configure Model Item	Profile option is used to define and set up order capture.
ASO: Order Feedback Queue Retention Time	Profile option is used to define and set up order capture.
ASO: Product Organization	Profile option is used to define and set up order capture.
ASO: Quote Duration	Profile option is used to define and set up order capture.
ASO: Quote Order Entered State	Profile option is used to define and set up order capture.
ASO: Quote Order Type	Profile option is used to define and set up order capture.
ASO: Receipt Method	Profile option is used to define and set up order capture.

Profile Name	Description
ASO: Reservation Level	Profile option is used to define and set up order capture.
ASO: Scripting Installation	Profile option is used to define and set up order capture.
ASO: Transaction Source Type	Profile option is used to define and set up order capture.
ASO: Use Installation Details	Profile option is used to define and set up order capture.
ASO: Quote Conversion Type	Profile option is used to define and set up order capture.
ASO: Default Order Category	Profile option is used to define and set up order capture.
ASO: Validate Sales Rep	Profile option is used to define and set up Order Capture.
CSC: Oracle Scripting	Profile option is used to define and set up Scripting.
CSC: Port for Oracle Scripting Application	Profile option is used to define and set up Scripting.
CSC: SID of Oracle Scripting Database	Profile option is used to define and set up Scripting.
CSC: Server Machine for Oracle Scripting	Profile option is used to define and set up Scripting.
JTF: ACTIVATE_AUTO_SELECT	Profile is used for the set up of foundation components.
JTF: ACTIVATE_CONTRACTS_PREFERRED_ENGINEERS	Profile is used for the set up of foundation components.
JTF: ACTIVATE_IB_PREFERRED_ENGINEERS	Profile is used for the set up of foundation components.
JTF: ACTIVATE_WORKFLOW_NAME	Profile is used for the set up of foundation components.
JTF_ACCOUNT_TYPE_BUSINESS_USER	Profile is used for the set up of foundation components.
JTF_ACCOUNT_TYPE_END_USER	Profile is used for the set up of foundation components.

Profile Name	Description
JTF_BIS_BIGGER_CHART_HEIGHT	Profile is used for the set up of foundation components.
JTF_BIS_BIGGER_CHART_WIDTH	Profile is used for the set up of foundation components.
JTF_BIS_CHART_HEIGHT	Profile is used for the set up of foundation components.
JTF_BIS_CHART_WIDTH	Profile is used for the set up of foundation components.
JTF_BIS_OA_HTML	Profile is used for the set up of foundation components.
JTF_CAL_ACCESS_ALL_CALENDARS	Profile is used for the set up of foundation components.
JTF_FM_CREAT_DEST	Profile is used for the set up of foundation components.
JTF_FM_ERROR_LOG	Profile is used for the set up of foundation components.
JTF_FM_EVENTS_LOG	Profile is used for the set up of foundation components.
JTF_FM_LOG_LEVEL	Profile is used for the set up of foundation components.
JTF_FM_MAX_CONNECTIONS	Profile is used for the set up of foundation components.
JTF_FM_MAX_PROCESS_IDLE	Profile is used for the set up of foundation components.
JTF_FM_MIN_CONNECTIONS	Profile is used for the set up of foundation components.
JTF_FM_MIN_PROCESSES	Profile is used for the set up of foundation components.
JTF_FM_NUM_CONNECTIONS	Profile is used for the set up of foundation components.
JTF_FM_NUM_PROCESSES	Profile is used for the set up of foundation components.
JTF_FM_OUT_DIR	Profile is used for the set up of foundation components.

Profile Name	Description
JTF_FM_PROCESS_IDLE	Profile is used for the set up of foundation components.
JTF_FM_REFRESH_RATE	Profile is used for the set up of foundation components.
JTF_FM_SERVER_ID	Profile is used for the set up of foundation components.
JTF_FM_TEMP_DIR	Profile is used for the set up of foundation components.
JTF_NTS_NOTE_STATUS	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_ APPLICATION	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_BLANK_ ROWS	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_CSS	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_CURRENCY	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_LANG	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_NUM_ROWS	Profile is used for the set up of foundation components.
JTF_PROFILE_DEFAULT_ RESPONSIBILITY	Profile is used for the set up of foundation components.
JTF_RS_EXECUTE_SALES_HOOK	Profile is used for the set up of foundation components.
JTF_TASK_DEFAULT_TASK_ PRIORITY	Profile is used for the set up of foundation components.
JTF_TASK_DEFAULT_TASK_STATUS	Profile is used for the set up of foundation components.
JTF_TASK_DEFAULT_TASK_TYPE	Profile is used for the set up of foundation components.
OS: Close Date Required for Pipeline Statuses	Profile option is used to define opportunity and forecasting.
OS: Customer Access Privilege	Profile option is a common profile.

Profile Name	Description
OS: Customer Sales Team Default Role Type	Profile option is a common profile.
OS: Daily Conversion Type	Profile option is used to define opportunity and forecasting.
OS: Date Mapping Type (of a Period for Pseudo Period Rates)	Profile option is used to define opportunity and forecasting.
OS: Default Calendar	Profile option is a common profile.
OS: Default Close Date Days	Profile option is used to define opportunity and forecasting.
OS: Default Opportunity Sales Stage	Profile option is used to define opportunity and forecasting.
OS: Default Opportunity Status	Profile option is used to define opportunity and forecasting.
OS: Default Opportunity win Probability	Profile option is used to define opportunity and forecasting.
OS: Default Sales Channel	Profile option is used to define opportunity and forecasting.
OS: Default Sales Methodology	Profile option is used to define opportunity and forecasting.
OS: Forecast Calendar	Profile option is used to define opportunity and forecasting.
OS: Default Forecast Confidence	Profile option is used to define opportunity and forecasting.
OS: Forecast Credit Type	Profile option is used to define opportunity and forecasting.
OS: Forecast Currency Code	Profile option is used to define opportunity and forecasting.
OS: Forecast Currency Conversion Date	Profile option is used to define opportunity and forecasting.
OS: Forecast Current Freeze Period	Profile option is used to define opportunity and forecasting.
OS: Forecast Default Amounts	Profile option is used to define opportunity and forecasting.

Profile Name	Description
OS: Forecast Freezing Enabled	Profile option is used to define opportunity and forecasting.
OS: Forecast Price List	Profile option is used to define opportunity and forecasting.
OS: Forecast price List Group	Profile option is used to define opportunity and forecasting.
OS: Forecast Price Volume Margin	Profile option is used to define opportunity and forecasting.
OS: Forecast Product	Profile option is used to define opportunity and forecasting.
OS: Forecast Rolling Calendar Periods	Profile option is used to define opportunity and forecasting.
OS: Forecast Sales Credit Type	Profile option is used to define opportunity and forecasting.
OS: Forecast Upside Confidence	Profile option is used to define opportunity and forecasting.
OS: Forecast With Current Pipeline Amounts	Profile option is used to define opportunity and forecasting.
OS: Generate Opportunity System Notes	Profile option is used to define opportunity and forecasting.
OS: Initial Workbench Region	Profile option is a common profile.
OS: Inventory Category Integration	Profile option is used to define opportunity and forecasting.
OS: Manager Update Access	Profile option is a common profile.
OS: Maximum Roll Days for Converting Amount	Profile option is used to define opportunity and forecasting.
OS: No Opportunity Ceiling	Profile option is used to define opportunity and forecasting.
OS: Notes Update Day Range	Profile option is a common profile.
OS: Opportunity Access Privilege	Profile option is used to define opportunity and forecasting.

Profile Name	**Description**
OS: Opportunity Competitor Entry	Profile option is used to define opportunity and forecasting.
OS: Opportunity Delete Ceiling	Profile option is used to define opportunity and forecasting.
OS: Opportunity Issue Entry	Profile option is used to define opportunity and forecasting.
OS: Opportunity Probability Link	Profile option is used to define opportunity and forecasting.
OS: Opportunity Sales Credit Enforced Sales Team Definition	Profile option is used to define opportunity and forecasting.
OS: Opportunity Status Override	Profile option is used to define opportunity and forecasting.
OS: Price List Group	Profile option is used to define opportunity and forecasting.
OS: Product Organization	Profile option is used to define opportunity and forecasting.
OS: Quota Credit Type	Profile option is used to define opportunity and forecasting.
OS: Sales Admin Update Access	Profile option is used to define opportunity and forecasting.
OS: Sales Lead Access Privilege	Profile option is used to define opportunity and forecasting.
OS: Sales Team Creator Keep Flag	Profile option is used to define opportunity and forecasting.
OS: Territory Minimum Number of Records for Parallel Processing	Profile option is used for territory management.
OS: Territory Number of Child Processes	Profile option is used for territory management.
OS: Territory Records to Commit	Profile option is used for territory management.
OS: Territory Records to Open for Processing Changed Accounts	Profile option is used for territory management.

Profile Name	Description
OS: Territory Multiple Winning Territories	Profile option is used for territory management.
OS: Time Format	Profile option is a common profile.
OS: Time Zone	Profile option is a common profile.
OS: To Do Default Priority	Profile option is a common profile.
OS: To Do Default Status	Profile option is a common profile.
OS: Use Inventory Items	Profile option is a common profile.
OS: Volume Forecasting Enabled	Profile option is used to define opportunity and forecasting.
OSM: Autodial Phone Number Prefix	Profile option is a common profile.
OSM: Default Channel	Profile option is used to define opportunity and forecasting.
OSM: Enable MS Schedule+ Integration	Profile option is a common profile.
OSM: Event Administrator	Profile option is a common profile.
OSM: Letter Printer	Profile option is a common profile.
OSM: Mail Response First Navigation Field	Profile option is a common profile.
OSM: Modem Serial Port	Profile option is a common profile.
OSM: Opportunity Adjustment Filter	Profile option is used to define opportunity and forecasting.
OSM: Receive Notifications	Profile option is a common profile.
OSM: Subordinate Query	Profile option is a common profile.
OSO: Country	Profile option is to used to define parties.
OSO: Debug Messages On	Profile option is a common profile.
OSO: Default Activity Priority	Profile option is to used to define parties.
OSO: Default Activity Status	Profile option is to used to define parties.
OSO: Default Activity Type	Profile option is to used to define parties.

Profile Name	Description
OSO: Default Address Lines	Profile option is to used to define parties.
OSO: Default Address Type	Profile option is to used to define parties.
OSO: Default Customer Category	Profile option is to used to define parties.
OSO: Default Forecast Currency	Profile option is used to define opportunity and forecasting.
OSO: Default Forecast Period Type	Profile option is used to define opportunity and forecasting, and parties.
OSO: Default Notes Display Days	Profile option is to used to define parties.
OSO Default Note Type	Profile option is to used to define parties.
OSO: Default Number of Days to Filter Notes	Profile option is a common profile.
OSO: Default Number of Days to Filter Tasks	Profile option is a common profile.
OSO: Default Org Phone Type	Profile option is to used to define parties.
OSO: Default Org Relationship	Profile option is to used to define parties.
OSO: Default Per Phone Type	Profile option is to used to define parties.
OSO: Default Per Relationship	Profile option is to used to define parties.
OSO: Default Sales Compensation Period Type	Profile option is used to define opportunity and forecasting.
OSO: Default Sales Group and Role	Profile option is used to define opportunity and forecasting.
OSO: Default Win Prob	Profile option is used to define opportunity and forecasting.

Profile Name	Description
OSO: Default Worksheet Lines	Profile option is used to define opportunity and forecasting.
OSO: Display Subordinate Current Pipeline	Profile option is used to define opportunity and forecasting.
OSO: Display Tracking Information	Profile option is used to define opportunity and forecasting.
OSO: Forecast Calendar Month	Profile option is used to define opportunity and forecasting.
PRM: Default Group	Profile option is used in the configuration of Partner Relationship Management.
PRM: Index Engine Last Run Timestamp	Profile option is used in the configuration of Partner Relationship Management.
PRM:Top N Match Partners	Profile option is used in the configuration of Partner Relationship Management.
PRM: User Types Partner User	Profile option is used in the configuration of Partner Relationship Management.
PRM: Vendor Party ID	Profile option is used in the configuration of Partner Relationship Management.
PRM: Work Flow Respond	Profile option is used in the configuration of Partner Relationship Management.

Testing an Implementation Project

Overview

As consultants, there are three main tools in your toolbox to test an implementation of Oracle TeleSales.

- Communication
- AIM documentation/methodology
- Communication

Communication is critical to the successful implementation of Oracle TeleSales or any application. Through AIM proven methodology, clear and concise requirements and expectations will and can be conveyed.

AIM and Implementation Testing

The importance of thorough testing cannot be understated. As a part of any consulting arrangement, time and resources should be allocated to encompass a solid testing strategy and thorough system and integration tests. The business testing process is covered as part of the TE series of documents in the AIM methodology. The relevant AIM documents include:

- TE.010 - Testing Strategy
- TE.020 - Unit Test
- TE.030 - Link Test
- TE.040 - System Test
- TE.050 - Systems Integration Test

Identifying Implementation Steps to Test

In the initial planning stages, it is recommended that Oracle Consulting develop a Scope, Objectives, and Approach (SOA) document (AIM CR.010) specifically for the TeleSales portion. This is useful in being able to identify the scope of the TeleSales effort up front.

This will create a 'lay of the land' and be instrumental in the testing process. At minimum, two AIM test documents should be developed: a testing strategy (TE.010) and a system test (TE.040).

From a planning perspective, if substantial integration requirements are indicated a TE.050 should also be required. It may be in the best interest of the project to benchmark a limited integration to determine the true level of effort before attempting to scope a larger integration effort.

Occasionally it is negotiated with a client that they will be responsible for developing and performing system tests. Regardless of who develops and performs the test, Oracle Consulting is not absolved from carefully reviewing test plans and their results. If developed by the client, the documents must be reviewed by subject matter experts to ensure success, both in Oracle TeleSales and other CRM and ERP applications, as well as custom applications.

The ultimate goal is not solely to finish a project on schedule and within budget; customer satisfaction is just as important and ultimately is often the touch point that results in continued, often lucrative vertical business. Ultimately, it is the success of the implementation that will provide the lasting impression of a systems effectiveness or wanting to do business with a vendor.

Guidelines

Prior to testing an Oracle TeleSales implementation, the client's systems environment must be stable. The network and database must be up and running. The 'Rapid Install' must have been accomplished. CRM Family Pack 1 must be installed. All PL/SQL packages must be tested prior to commencing with integration testing.

Troubleshooting

- Verify network
- Verify database server
- Verify web server
- Verify PL/SQL packages
- Verify user roles/privileges are defined and assigned

System Error Messages

If the following system error message, *"We could not locate your menu. This may be caused by internal errors or corrupted data. Please print out this page and contact your system administrator."* appears, use the following troubleshooting tip to correct the problem.

Steps

Step Number	Troubleshooting Steps
❑ Step 1	Examine the symptom message to verify Profile setting for the selected user account. For example, *"The menu could not be found on user info: R[22406]|T[691]|L[US]"*. ■ R[22406] - refers to default responsibility ID ■ |T[691]| - refers to default application ID
❑ Step 2	To set the profile option to the correct default values, first log onto the Form Server with the System Administrator responsibility.
❑ Step 3	Navigate to Profile > System.

Step Number	Troubleshooting Steps
❏ Step 4	Enter the user name or find it in the system.
❏ Step 5	Go the Profile field and enter the following string search. ▪ %default%app% - to see the default application ID ▪ %default%responsibility% - to see the default responsibility ID
❏ Step 6	Make the appropriate change under User.
❏ Step 7	Save the changes.
❏ Step 8	Test the login to the application.