Oracle® Sales Online

Implementation Guide

Release 11*i*

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Oracle Sales Online Implementation Guide, Release 11*i*

Part No. A87352-04

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- Did you find any errors?
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Oracle Corporation
CRM Content Development Manager
500 Oracle Parkway
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U.S.A.

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Preface

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

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

Introduction to Oracle Sales Online

Oracle Sales Online is an HTML based application which provides sales managers, sales representatives, and sales executives assistance in managing their business opportunities, customers, forecasting, incentive compensation, partners, and quotes. Sales Online enables the management of business data using the Trading Community Architecture (TCA) customer model. TCA enables Sales Online to support complex relationships which further allows Sales Online users to provide exceptional service to customers. Sales Online is integrated with Oracle TeleSales, Oracle Marketing Online, Oracle Partner Relationship Management, and Oracle Incentive Compensation.

Intended Audience

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

Related Documentation and Resources

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

Reference Documentation

Installing Oracle Applications, Release 11i

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

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

Oracle Applications Flexfield Guide

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

Oracle Applications Product Update Notes, Release 11i

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

Oracle Applications System Administrator's Guide

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

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*.

Additional Product-Related Documentation

Implementing CRM Applications

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

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

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

Oracle CRM Foundation Technical Reference Manual

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

Oracle Inventory User's Guide

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

Oracle Marketing Concepts and Procedures

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

Oracle Marketing Encyclopedia Concepts and Procedures

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

Oracle Order Capture Concepts and Procedures

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

Oracle Sales Compensation Implementation Guide

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

Oracle Sales Online Technical Reference Manual

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

Documentation Accessibility

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Implementing Oracle Sales Online

Overview of Oracle Sales Online

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

Overview of Functionality

Sales Online functionality includes the following:

Customer and Contact Management

Sales Online provides sales representatives with a complete customer overview at each stage of the sales process, in both Business to Business and Business to Customer environments. Before contacting a customer, a sales person can review customer information including: products installed, outstanding service requests, payment history, key relationships, open opportunities, and interaction history-customer touch points. Comprehensive customer information allows salespeople to better manage their customers and to plan each customer interaction more efficiently.

Understanding Trading Community Architecture

The Sales Online customer model is based on the Trading Community Architecture, also referred to as TCA. Trading Community Architecture is an architecture designed to support complex trading communities. The goal of TCA is to provide the foundation for Oracle Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and eBusiness applications, (i.e., the entire eBusiness Suite). To do this, TCA strives to model all relationships within a ’trading community’. For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers and business consumers. The appliance manufacturer not only wants to track relationships between itself and other entities within the trading community, it is also interested in relationships that other community members have with each other. The appliance manufacturer may not even have direct relationships with all the members of its trading community. But, it is important that the appliance manufacturer know about these entities and how they relate to others within the trading community.

Within Sales Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a business contact is a person who has a relationship (usually an employee/employer relationship) with the organization with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, i.e., an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet) number, or tax identification number.

Opportunity Management

Account managers, sales managers, and territory managers can use Sales Online to analyze their pipelines. Sales Online can be used to obtain real time reports summarizing their groups' pipeline.

Opportunity and Product Category Forecasting

Forecasting is a quantitative tool used to predict the amount of sales for a specified time period. Forecasting can be used by managers and salespeople to commit to the amount of sales that they will close by the end of the forecasting period.

The following table details the forecasting levels available in Sales Online:

Forecasting levels

Level	How it works
Product Category	Forecasting at the Product Category level provides salespeople with an easy way to forecast their sales at the product level by rolling up opportunity lines into product groupings. From the summary page, Pipeline value links take you to the Forecast Summary by Product Category report.

Level	How it works
Opportunity	Forecasting at the Opportunity level provides a tool for salespeople to create their own view and commitment of the opportunities that they or their sales representatives are working on. At this level, a manager can review, adjust, and commit to the numbers used in forecasting at the opportunity level.

Managers can create their own views of their sales representatives' forecasted opportunities and can track forecast adjustment history.

Notes, Tasks, and Attachments

Sales Online users can create notes and attachments and link them to opportunities, organizations, relationships, people, and forecasts. By clicking an attachment link, you will launch the corresponding application automatically. Notes are limited to 2,000 characters. Attachments include; Universal Resource Locators (URLs), free form text, and standard format files.

Users can create and assign tasks to themselves or other sales team members. Tasks are displayed on the Activity tab's summary page. You can personalize the page through the Activity profile preferences.

Interaction Management

Sales Online users have visibility into all customer touch points through integration with the CRM Foundation module. Interaction History displays interactions conducted by other systems and/or individuals.

Quote Management

Oracle HTML Quoting is an electronic commerce application which provides a Web-based interface for assisted selling of products and services to customers and business partners. Oracle HTML Quoting enables the easy creation, management and personalization of customer quotes in a secure environment. With seamless integration to Oracle Enterprise Resource Planning (ERP) Applications and other Oracle Customer Relationship Management (CRM) Applications, Oracle HTML Quoting enables companies to provide optimum customer service during the campaign and sales processes.

Partner Management

Users can now take advantage of the expanded definition of partner relationships and integration with Oracle Partner Relationship Management for indirect selling channels. And, using an exchange server, users can use Opportunity Exchange for co-selling.

Incentive Compensation

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

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

Salespeople can also estimate their commissions with Income Planner by using their submitted forecast as the baseline.

Through Quota Planning, sales managers and executives can plan and distribute quotas to different sales groups and/or professionals through a simple HTML interface.

Collateral Fulfillment

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

Marketing Encyclopedia System

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

New in this Release

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

Customer Enhancements

The relationship detail page can display multiple relationship addresses. Additionally, organization detail pages now display both Active and Inactive relationships which you can customize. You can also enter the Standard Industry Code (SIC) and SIC type on the organization detail page.

Tasks Enhancement

Users can now add start and end times to their tasks.

Quotes

Oracle HTML Quoting is an electronic commerce application which provides a Web-based interface for assisted selling of products and services to customers and business partners. Oracle HTML Quoting enables the easy creation, management and personalization of customer quotes in a secure environment. With seamless integration to Oracle Enterprise Resource Planning (ERP) Applications and other Oracle Customer Relationship Management (CRM) Applications, Oracle HTML Quoting enables companies to provide optimum customer service during the campaign and sales processes.

If iStore is installed, Sales Online users can create, view, and copy quotes. For information about creating, maintaining, searching quotes, and configuring quote line items, please refer to the *Oracle HTML Quoting Concepts and Procedures* guide.

Forecasting Enhancements

Sales Online has enhanced forecasting functionality that includes to include; Forecast Dates on Opportunity Lines and other forecast streamlining enhancements. This version of Sales Online introduces the concept of a forecast date for each opportunity line. This will allow salespeople to create one opportunity and distribute the opportunity into multiple forecast periods

Salespeople are able to automatically generate product category and opportunity worksheets through new forecasting functionality.

Resource Team Enhancement

Users are now able to select Resource Teams to add to Sales Teams. This allows users to quickly add multiple salespeople to a sales team.

Online Territory Assignment Program

The Territory Assignment Program (TAP) allows administrators to assign opportunities and customers to salespeople based upon territory set up. Until this release, this functionality was available only in batch mode, now territory assignment is available online. Opportunities and customers are automatically assigned when they are created or updated.

Application Architecture

Oracle Sales Online is certified on JDK 1.2.2; this is recommended for optimum performance.

The application architecture for Oracle Sales Online is as follows:

Technology Stack

Oracle Forms Designer, version 6.0.8.10.3

Oracle 8 Enterprise Edition Release, version 8.1.6

Oracle Reports Designer, version 6.0.8.8.3

Oracle WebDB, version 2.2.2.1

Apache version, version 1.3.9

Java Developer Kit Server Side, version 1.1.8

Oracle JSP engine 1.0.0.6 and 1.1.2 (recommended)

Dependencies

Sales Online requires the following related products, components, and their dependencies, to be installed and implemented:

- Oracle CRM Foundation Components (Resource Manager, Task Manager, Notes)
- Oracle Sales
- Oracle iStore (If you want to use Quoting, please note that Oracle Order Capture is a dependency of Oracle iStore.)

Related Products and Components

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

- Oracle ERP applications (HRMS, Inventory, Order Management, Accounts Receivable, Trading Community Architecture)
- Oracle CRM Foundation Components (Interaction History, Territory Manager, 1-to-1 Fulfillment)
- Oracle Marketing Online

- Oracle Marketing Encyclopedia
- Oracle Partner Relationship Management
- Oracle Sales Compensation
- Oracle Service
- Oracle TeleSales

Setting Up Sales Online

Overview

The following sections of this document describe the pre-installation and implementation steps necessary to implement Sales Online.

Pre-Installation Steps

These steps must be performed before Sales Online is installed.

Prior to applying the CRM Family Pack, you must install the following standalone utilities into your database.

1. Install XML Parser for PL/SQL (plxmlparserV1_0_1.zip)
2. Install XML SQL Utility (Xsul2.zip)

Note: You can find Install XML Parser for PL/SQL and XML SQL Utility in the utility directory in the common area of your file system.

Unzip both files and follow the directions in the readme.html file to load them. If you need more instructions, you can find them in the CRM Family Pack installation.

3. Check to make sure that a jar directory has been created under ASF_TOP before installing the ASF patch. Make sure that the user performing the installation has privileges to write to the directory.

Implementation Steps

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

Please note, depending upon your implementation of Sales Online, you might see a Calendar subtab under the Activity tab. This is an alpha version of this feature. This version is not supported for use by production at this time. This prototype version of the up-and-coming production version will be supported in a future release of Sales Online. To exclude the Calendar subtab from the Activity tab, using a menu exclusion. For details about menu exclusion, please refer to the *Implementing Oracle CRM Foundation* guide.

Prerequisites

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

- *Oracle System Administrator's Guide*
- *Supplemental CRM Installation Steps Release 11i*

User creation and assignment of Oracle Sales Administration, Order Management Super User, Receivables Manager, and System Administrator responsibilities must also be completed.

Steps

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

Mandatory	Step Number	Oracle Sales Online Implementation Steps
❑ Yes	❑ Step 5	Set up Customer Source: *Oracle Accounts Receivable User Guide*
❑ Yes	❑ Step 6	Set up Home Page
❑ Yes (steps 7 h and i are optional)	❑ Step 7	Set up Opportunity and Forecasting: **a.** Status **b.** Win Probability **c.** Stages **d.** Calendar **e.** Define Credit Types (Switch to Order Management responsibility for this step) **f.** Interest Types **g.** Interest Codes **h.** Plan Element Mapping **i.** Load Inventory Categories **j.** Currencies **k.** Forecast Category Mapping **l.** Create Materialized Views
❑ Optional	❑ Step 8	Set up Quoting
❑ Optional	❑ Step 9	Set up Opportunity Exchange
❑ Yes	❑ Step 10	Set up Security Profiles
❑ Yes	❑ Step 11	Lookups
❑ Yes	❑ Step 12	System Profile Options
❑ Yes	❑ Step 13	Set up Note Types and map to source Reference: *Implementing Oracle CRM Foundation, Notes*
❑ Optional	❑ Step 14	Set up Territory Management Reference: *Implementing Oracle CRM Foundation, Territories*
❑ Yes	❑ Step 15	Set up Task Manager (types, status, priorities) Reference: *Implementing Oracle CRM Foundation, Task Manager*

Mandatory	Step Number	Oracle Sales Online Implementation Steps
❑ Optional	❑ Step 16	Set up Interaction History Reference: *Implementing Oracle CRM Foundation, Interaction History*
❑ Optional	❑ Step 17	Set up Marketing Encyclopedia Source: *Oracle Marketing Encyclopedia Implementation Guide*
❑ Optional	❑ Step 18	Set up Marketing Campaigns Reference: *Implementing Oracle Marketing Online*
❑ Optional	❑ Step 19	Set up Fulfillment Reference: *Implementing Oracle CRM Foundation, 1-to-1 Fulfillment*
❑ Optional	❑ Step 20	Set up Partners Reference: *Implementing Oracle Partner Relationship Management*
❑ Optional	❑ Step 21	Set up Compensation Reference: *Implementing Oracle Sales Compensation*
❑ Yes	❑ Step 22	Run Concurrent Programs
❑ Optional	❑ Step 23	Set up Descriptive Flexfields Reference: *Oracle Applications Flexfield Guide*
❑ Optional	❑ Step 24	Set up Blind Search for LOV
❑ Optional	❑ Step 25	Setting up Import Leads
❑ Optional	❑ Step 26	Set up Sales Online Wireless

Step 1: Creating an Employee in Oracle HRMS

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

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

Step 2: Defining Users and Assigning Responsibilities

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

In this step, you will create an Oracle Applications user and associate the user to the HRMS employee defined. Then you will give the user the responsibility of Oracle

Sales Online User, Sales Online Manager, Oracle Sales Administrator, or any responsibility that has access to Oracle Sales Online.

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

Note: You will need the user id when creating resources.

Step 3: Creating, Modifying, and Importing Resources

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

3a) Importing Resources

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

   The Selection Criteria window opens.

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

Note: The system will generate a resource number which you can use to find resources in the next section.

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

3b) Defining Resource Groups

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

   The Define Groups window appears.

2. To find an existing resource group:

   a. Click Find on the application toolbar to open the Find Group window.

   b. Select a group name from the list of values in the Group Name field and click **Find.** The application populates the Results section with the group name search results.

   c. Select a group name in the Results table and click **OK**. The application populates the Define Groups window with the group information.

3. To create a new group:

   a. Enter a group name in the Group Name field.

   b. Enter a brief description of the group in the Group Description field.

   c. Enter the effective dates for the group in the Start and End fields.

4. Use the Relations tab to relate Parent Groups.

5. Save your work when finished.

Note: Group usages must be "Sales & TeleSales" or the user will not be able to log in. Also, in order to enable the resources to perform partner functions the Group usage must also be set to "Sales & TeleSales."

Note: It is easiest to build the hierarchy from the bottom of the hierarchy to the top.

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

3c) Creating and Modifying Resources

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

   The Find Resource window appears.

2. Select Employee (or other resource) from the list of values in the Category field.

3. Select from the list of values in the Transaction Number and Name fields.

4. Click **Find**.

   The Resource Search results window opens

5. Select the desired resource and click Resource Details to open the Resource window.

6. Verify that the user name is displayed in the User Name field, if no name is displayed, enter the user name.

7. In the Roles tab, assign a Role Type of Sales, Telesales, or Partner Relationship Management. Role type must be one of those three or the user will not be able to log into Sales Online.

8. Define the role by selecting from the drop down list.

9. Save your work when finished.

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

Note: A group can have only one manager. Having multiple managers in a group will cause problems with forecasting rollups.

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

1. Giving the manager resource both the Sales Manager and the Sales Representative roles.

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

3d) Assign Resources to Groups

1. From the Resources window, in the Groups tab, assign the resource to a group.
2. Define your Group by selecting from the list of values.
3. Define your Group Member Roles by selecting from the list of values.
4. Save your work when finished.

Note: A resource can be in multiple groups. This is supported in Oracle Sales Online’s Opportunity and Forecasting module.

Note: A group can have only one manager. Having multiple managers in a group will cause problems with forecasting rollups.

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

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

Note: When moving a sales person from one group to another, do not remove them from their original group. Instead, click the **Move** button and add them to the new group. This will automatically end date their previous group membership.

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

Step 4: Creating Locations and Organizations

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

Reference: *Implementing Oracle HRMS (Implementation Steps, Work Structures)*

Step 5: Setting Up Customer

This is an overview of the detailed directions you will find in the referenced document, *Oracle Accounts Receivable User Guide* and *Oracle Accounts Receivables Implementation Guide*. In this step, you define states, provinces, and counties in this step. Before you begin, you will need to switch responsibilities to Receivables Manager.

Reference: *Oracle Accounts Receivables User Guide* and *Oracle Accounts Receivables Implementation Guide*

5a) Define Sales Tax Location Flexfield

1. Switch responsibilities to Receivables Manager.
2. Go to **Set Up > Financials > Flexfields > Key > Segments**.
3. To set up the Tax Location Flexfields:
   - Query the existing "Sales Tax Location Flexfield" in the "Oracle Receivables" application.
   - Create a new structure in the flexfield for each country, province, and state.
4. Once you have completed the previous step, do the following:
   - Freeze the Flexfield segments for the Structure you have set up.
   - Compile the flexfield by clicking the Compile button in the main Key Flexfield Segments window.
5. After you have compiled the flexfields, reference the new structure in the Receivables System Options set up.

5b) Set Up Receivables System Options

In this step you will set up the Receivables System options. Before you begin, if you have not already done so, switch responsibilities to Receivables Manager.

Reference: *Oracle Accounts Receivables User Guide* and *Oracle Accounts Receivables Implementation Guide*

1. Go to **Set Up > System > System Options**.
2. Under "Tax" set the "Location Flexfield Structure" to the new structure set up in step 5a. Save this change and five concurrent jobs will be submitted to generate the Tax Location Structure. The Tax Locations screen may not be accessed, to enter the actual State or Province values, before these concurrent jobs have completed.

   If there are any incompletely or inaccurately defined Tax Location Flexfield Structures in the Key Segments screen, then all five concurrent jobs will usually fail.

   Note: If the first four jobs complete and only the final job fails, this will not impact further use of the location structure in CRM.

5c) Set Up Tax Locations

In this step you will set up the tax locations.

Reference: *Oracle Accounts Receivables User Guide* and *Oracle Accounts Receivables Implementation Guide*

1. Go to **Set Up > Tax > Locations**.

Step 6: Setting Up Home Page

In order to personalize your home page, you must run the following concurrent programs.

For more information about running concurrent programs, see Step 22.

1. Refresh AS_PERIOD_DAYS table
2. Refresh of AS_SALES_CREDITS_DENORM (Complete)
3. Initial Build of Opportunity and Lead Bins

   This program is used for the Opportunity home page bins. This program must be run initially before users can set up Opportunity bins. This program loads the materialized view with sales credit information. No parameters are needed.

Note: You must run this program every time the as_sales_credit_denorm is rebuilt or when values such as sales stages or statuses are changed.

4. Initial Load for Leads Reports
5. Initial Load for Opportunities Reports

To refresh home page bins and reports, run the following concurrent programs at regular intervals:

1. Refresh of Opportunity Bins Data

   This program should be scheduled to run periodically to refresh the materialized view for the Opportunity bins.

   Note: Users will not see opportunities in the bins that were created after the last refresh of the materialized view.

2. Refresh of Lead Bins Data

   This program should be scheduled to run periodically to refresh the materialized view for the Leads bin.

   Note: Users will not see leads in the bins that were created after the last refresh of the materialized view.

3. Refresh of Leads Reports

   Note: You will need to run this program after applying any OSO patch.

4. Refresh for Opportunities Reports
5. Refresh of AS_SALES_CREDITS_DENORM (Incremental)
6. Incremental Refresh of AS_MC_SALES_CREDITS_DEN table (From, To)

   For more information on setting up home page marketing reference material, please refer to *Oracle Marketing Encyclopedia Concepts and Procedures Guide*, "Integrating with OneSource" under the "Implementing Oracle Marketing Encyclopedia" section.

Step 7: Setting Up Opportunity and Forecasting

Sales people can categorize opportunity purchases using three variables.

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

System Profiles for Categorizing Opportunities and Forecasting

Opportunity and Forecasting classifications are governed by the following profiles:

Opportunity Profiles

- **ASO: Product Organization**: Org id used in displayed inventory items (mandatory).
- **OSO: Enable Lead Share:** Display Lead Share button
- **OS: Enable Real Time Opportunity and Customer Assignment**
- **OSO: Enable Quote:** If set to YES, displays the Create Quote button
- **OS: Inventory Category Integration**: Flag to populate Inventory categories in Oracle Sales
- **OS: Compensation Sales Credit Type**: Compensation Sales Credit Type
- **OS: Customer Address Required for Opportunity and Sales Lead:** Customer address required for opportunity.
- **OS: Default Close Date Days**: Default Opportunity Close Date days (Value + Current Date = Opportunity Close Date)
- **OS: Default Opportunity Sales Stage**: Default Sales Stage
- **OS: Default Opportunity Status**: Default Opportunity Status
- **OS: Default Opportunity Win Probability**: Default Opportunity Win Probability
- **OS: Default Sales Channel**: Default Sales Channel
- **OS: Generate Opportunity System Notes**: Determines whether or not notes are generated when parts of the opportunity change.

- **OS: Maximum Roll Days for Converting Amount**: Maximum Roll Days for Converting Amount if no conversion rate for a day.
- **OSO: Opportunity Probability Link**: Determines whether a warning or an error is given if the win probability amount does not fall within the sales stage probabilities. The warning is turned on by default.
- **OS: Opportunity Sales Credit Enforce Sales Team Definition**: If set to Yes, a user cannot remove a person from an opportunity sales team if that person is receiving sales credits for that opportunity.
- **OS: Sales Methodology**: Default sales methodology
- **OS: Sales Team Creator Keep Flag**: Default keep flag for sales team creator.
- **OS: Forecast Sales Credit Type**: Forecast Credit Type for Opportunity Sales Credits (mandatory)
- **OS: Daily Conversion Type**: Currency conversion type used for daily conversion rates.
- **OS: Date Mapping Type**: Indicates whether the first or last date of the period is used for calculating pseudo period rates.
- **OS: Allow Updating Frozen Opportunities**: When set to yes, users can update frozen opportunities.
- **OSO: Enable Product Category in Opportunity Advanced Search:** The profile is used in Opportunity Advanced Search. If set to Yes, the product category multi-select list is displayed and you can perform a search by product category.
- **OS: Opportunity Sales Team Default Role Type:** The role set by this profile is used as a default when creating a sales team entry for opportunity.

Forecasting Profiles

- **OSO: Default Forecast Currency**: Default currency used for forecasting.
- **OSO: Default Forecast Period Type**: Default period used for forecasting.
- **OSO: Default Forecast Worksheet Lines**: Choose to default worksheet lines to zero or pipeline.
- **OSO: Display Subordinate Current Pipeline**: Choose to display subordinate current pipeline on the Manager’s forecast page.
- **OSO: Display Opportunity Worksheet Grand Totals**: Choose to display worksheet grand totals.

- **OSO: Forecast Calendar Month**: Choose the forecast calendar month.
- **OS: Forecast Calendar**: The name of the calendar being used to manage forecasts.
- **OS: Use Forecast Materialized View:** If set to yes, materialized views will be used to display data on the forecast pages.
- **OSO: Forecast Autosubmit Worksheets:** Used to set the default worksheet(s) to be submitted when submitting forecasts.
- **OSO: Forecast Max Generate Months:** The maximum number of months that the rep can submit forecast for on the Generate Forecast page.

7a) Opportunity Status

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

The following statuses are predefined:

- Active
- Inactive
- Lost
- Won
- Forecast
- No Opportunity
- Dealer
- Expired
- Preliminary
- Upside
- New Opportunity

Use the following procedure to define Opportunity Status.

Steps

1. Under the Sales Administrator responsibility, choose **Oracle Sales Set up > Opportunity > Status**

2. Enter the status code meaning and description for the status. The meaning is displayed on the user interface.
3. The Open check box is used to signify whether the opportunity is open or closed. If the check box is selected, it means that the opportunity is open. Conversely, if the check box is not selected, it means that the opportunity is closed and therefore requires you to enter a close reason.
4. The defined status can be used for Opportunity, Sales Lead, or both, by selecting the appropriate check box in the "Used For" region.
5. The Win Loss Indicator region indicates whether the deal has been won or lost. If the open flag is unchecked, then the choices are won or lost.
6. Select the Used in Forecast check box in order to be able to include the opportunity in the forecast.
7. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the status will be displayed on the Partner Relationship Management screen, the Oracle Sales screen, or both. The default entry is All.
8. Select the Enabled check box to activate the opportunity status.
9. Save your work.

7b) Modifying Win Probabilities

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

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

Use the following procedure to define or modify Win Probabilities.

Steps

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

   The Define Win Probabilities Window appears.
2. To enter a new probability:
   a. Click in a Win Probability field in a new row.

   b. Enter a Value between 0 and 100.

3. Enter or change the information in the Meaning field.
4. Enter a start date in the From field. An entry in this field is mandatory.
5. Optionally, enter an end date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
6. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Win probability will be displayed on the Partner Relationship Management screen, the Oracle Sales screen, or both. The default entry is All.
7. Select the Enabled check box to enable the Win Probability. If the Enabled box is not selected, the Win Probability will not appear in the user's interface.
8. Save your work.

7c) Defining or Modifying Sales Stages

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

Use the following procedure to define or modify Sales Stages.

Steps

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

   The Sales Stages Window appears.

2. To enter a new Sales Stage:
   a. Click in a Name field in a new row.
   b. Enter a name to appear in the LOV.
   c. Enter a description
   d. Enter a minimum and a maximum win probability value for this stage in the Min and Max fields.

      If the profile "OS: Opportunity Probability link is set to "warning" or "error," the system will accept values outside range but give a warning message.

   e. Enter a start date in the From field. An entry in this field is mandatory.
   f. Optionally, enter an end date in the To field. If an end date is entered, the Sales Stage will be disabled after that date.

3. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Sales Stage will be displayed on the Partner Relationship Management screen, the Oracle Sales screen, or both. The default entry is All.
4. Select the Enabled check box to enable the Sales Stage. If the Enabled box is not selected, the Sales Stage will not be enabled.
5. Save your work.

7d) Calendar

You must set up a calendar for forecasting. Define a calendar that represents your organizations fiscal cycles.

Steps

1. You must first define period types (e.g., month, quarter, year). Choose **Oracle Sales Set up > Opportunity > Calendar > Types**.
2. Define your accounting calendar. Choose **Oracle Sales Set up > Opportunity > Calendar > Accounting**.

Refer to the *General Ledger Users Guide (Set up, Planning and Installation: Period Types and Calendars)* for more information.

7e) Defining Credit Types (Order Management)

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

Steps

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

   The Sales Credit Type window appears.

3. Enter the user defined Forecast Credit Type name and description in the appropriate fields.

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

Defining Interest Types and Codes

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

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

7f) Setting Up Interest Types

Interest Types can be used to classify your customers (organizations and people), opportunities, and purchases in a number of ways. An interest type can represent any classification of products.

The Interest Type classification has three layers:

- Interest Type
    - Primary Interest Type
        - Secondary Interest Code

Use the following procedure to define Interest Types.

Steps

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

   The Interest Types Window appears.

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

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

5. Select the Enabled check box to enable the interest type. If the Enabled check box is not selected, the interest type will not appear in the user's interface.
6. Save your work.

7g) Setting Up Interest Codes

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

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

Use the following procedure to create Interest Codes.

Steps

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

   The Interest Codes window appears.

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

3. Click Find to see what codes, if any, have been set up for this Interest Type. The Primary and Secondary Code regions will display the results of the search.
4. In the Primary Codes region, enter the different values desired for the Interest Type. If you are also setting up Secondary Codes, the values entered here will be variables with Secondary Codes as their values.
5. If you are setting up Secondary Codes, click in the Code field of the appropriate Primary Code.
6. In the Secondary Codes region, select a blank line and enter a Code and Code Description. If no blank line is available, click the **New Record** button on the toolbar to create one.
7. Save your work.

7h) Plan Element Mapping

In order for sales personnel to be able to estimate their commissions based on their submitted product category worksheet forecasts, interest types and codes must be mapped to Plan Elements in Oracle Sales Compensation.

One Plan Element can be mapped to one or more interest type / primary interest code / secondary interest code.

Plan element mapping is required for using Income Planner.

Steps

1. Navigate to **Opportunities** > **Sales Categories** > **Interest Codes and Types** >**Plan Element Mapping**
2. From the first column, select the plan element you want to map.
3. From the second column, choose the mapping type.
   - Map quota to primary interest code - if you want to map the plan element to a primary code.
   - Map quota to secondary interest code - if you want to map the plan element to a secondary code.
   - Map quota to interests type - if you want to map the plan element to an interest type.
4. Depending on the value you have chosen in step 3 above, continue by choosing combinations of interest types and codes.

5. Save your work.

7i) Loading Inventory Categories

Inventory Categories are required when using Inventory and other ERP modules.

To implement this feature, the administrator must do the following steps:

Steps

1. Define interest types and set expected purchase flag to "Y" for those interest types for which you want to load inventory.
2. Profile Value Set up:
   - Using the Profiles form, set the OS: Inventory Category Integration profile value to Yes.
3. Run the concurrent program:
   - Load Interest Types and Codes to Inventory Categories

This program creates the Inventory Categories.

   - Using the Submit Requests form in Concurrent Requests menu, run the concurrent program.

4. Inventory Category and Item Mapping
   - Map each inventory item to an inventory category under the Oracle Sales and Marketing Category Set.

This must be done manually by using Oracle Inventory screens. For details please refer to *Oracle Inventory Concepts and Procedures Guide*.

Note: An item can be mapped to only one Category in a given category set. This is a restriction from Oracle Inventory.

7j) Working with Multiple Currencies

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

Oracle Sales Online calculates currency conversion for individual opportunity purchases based on the daily rate on the date a sales person predicts an opportunity is going to close (the close date). If a conversion rate is missing, then the program looks back in time to find a conversion rate. How far back is determined by setting the value of the profile OS: Maximum Roll Days for Converting Amount. If no rate is found within this period, then Oracle Sales Online will display asterisks with a message that no rates were found.

The currency conversion type for opportunities is set by the profile OS: Daily Conversion Type.

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

Prerequisite Profile Option Setups for Global Forecasting

- OSO: Default Forecast Currency

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

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

Forecasting calculates currency conversion based upon pseudo period rates only.

If you are a manager or administrator, on the forecast main page the currency is converted all the time. But on the opportunity worksheet and the product category worksheet, currency amounts are not converted when you drill down to a subordinate's forecast.

If you have submitted a worksheet, you cannot change the currency in the forecasting profile for that period.

Entering Daily Conversion Rates

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

Steps

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

   The Daily Rates window appears.

2. Click in the From field and enter the currency you are converting from the LOV.
3. If your currency does not appear in the adjacent To field, enter it from the LOV.
4. In the Type field, enter the conversion rate type from the LOV.
5. Enter the daily conversion rate in either of the currency conversion fields. The second rate will be calculated and entered automatically.
6. Repeat steps 2 through 5 for any other currencies.
7. Save your work.

Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

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

Steps

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

Setting Up Conversion Types for Period Types

Steps

1. Choose **Oracle Sales Setup > Multi-currencies > Type Mapping** under the Oracle Sales Administrator responsibility.

   The Calendar window appears.

2. Enter the calendar for which you are setting conversion rates from the LOV. Make sure that the calendar you are using is the forecast calendar.
3. Click **Find**. If any period types have conversion rates associated with them, the Types Mappings region will be populated.
4. In Period Type, use the LOV to enter a period type for which you wish to set up conversion rates.
5. In Conversion Type, use the LOV to enter the currency conversion type you want to use.
6. Check the Updatable and Deletable check boxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).
7. Repeat steps 4 through 6 for all period types in this calendar.
8. If you want these rates to be updatable and editable by the user, check the appropriate check box.
9. Save your work.

Defining Conversion Rates for Periods

Steps

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

   The Pseudo Period Rates window appears.
2. Enter the calendar your organization is using from the LOV in the Calendar field. This should be the same calendar set up in OS: Forecast Calendar.
3. Select the **Start Date** or **End Date** radio button. Your selection must be the same as the one you made when you set up the OS: Date Mapping Type system profile.
4. If you want to modify information only about a single period, enter the period name in the Period field. If this field is left blank, the search will display all periods that have daily rates entered for them.
5. Click **Find**.
6. The Period Rates region will display all periods that have the rate values available.

7. If any periods are missing, you will have to add them manually:
   a. Click in an empty Period field in the Period Rates Region (or create one by clicking the **New Record** button in the toolbar) and use the LOV to enter a period.
   b. Using the LOV, enter the currency you wish to convert in the From field.
   c. Using the LOV, enter the currency you wish to convert to in the To field.
   d. Enter the rate in the Rate field.
   e. Repeat steps a through d until you have added all the periods you wish to be able to forecast.
8. If you wish to modify any displayed rates, you can do so by making a change in the Rates field.

   Note: You cannot modify the rate field if the **Updatable** check box is not checked. This check box is set in the Period Type and Daily Conversion Type Mappings window.
9. Save your work.

Reporting Currency Mapping

All opportunity and forecast currency conversions are based upon the reporting currency setups.

Steps

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

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

7k) Forecast Category Mapping

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

Use the following procedure to set up Forecast Categories.

Steps

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

   The Forecasts Sales Categories window appears.

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

Note: You can forecast only when the forecast dates fall within the forecast category dates.

7l) Create Materialized Views

The materialized view uses a periodically refreshed aggregation table that reduces query execution time in generating Current Pipeline Values on this page. Please make note, this feature does not run in real-time. According to business requirements, the table is refreshed periodically based on a pre-determined schedule. In the Sales Online application, a line in blue lettering, below the forecast profile option, shows the exact time stamp. Please see the *Sales Online Concepts and Procedures Guide* for additional information.

Steps

Run the following concurrent programs to create materialized views for forecasting.

- Initial Build of Forecast Summary Table: Builds the materialized view to view forecast summary page
- Refresh of Forecast Summary Tables
- Refresh of AS_SALES_CREDITS_DENORM
- Build Materialized View for Forecast Main Page: Populated the data from as_sales_credits_denorm

The first time you create materialized views, you must run both the Initial Forecast Summary Table and Build Materialized View for Forecast Main Page concurrent programs. To get updated pipeline values, you must run the Refresh Forecast Summary Table concurrent program.

Step 8: Setting up Quoting

Please see the *Oracle HTML Quoting Implementation Guide* for detailed instructions and information.

You must set the profile OSO: Enable Quote in order to see the "Create Quote" button.

Please note, you can skip the following steps in the Oracle HTML Quoting Implementation Guide if you have already performed them in Sales Online:

- Step 5: Process Flow for Required Sales Representative Steps
- Step 6: Defining a Sales Representative Responsibility
- Step 7: Setting Up Sales Representatives

Step 9: Setting Up Opportunity Exchange

Opportunity exchange allows two partners to work simultaneously on the same opportunity in order to stimulate collaborative selling.

Setting up the opportunity exchange requires two different setups.

1. LETS (Opportunity Exchange Transaction Server) setup.

This includes the steps to setup a partner on the LETS to enable sharing of opportunities. Only when the partner is set up on the server can the exchange of information take place.

2. Vendor/Partner Setup.

This includes the setup needed to actually carry out the exchange of information between partners.

Here are the steps to set up the LETS Server:

1. Login to the LETS server.
2. Choose the **Create Partner** tab.
3. Enter the company name.

4. Enter the company code (this can be the company stock ticker or the company short name).
5. Submit changes.
6. The confirm partner information appears.

Note: You will need the partner ID that is generated in order to exchange opportunities.

System Profiles for Opportunity Exchange

- **OSO: Enable Lead Share:** The profile option to enable opportunity sharing throughout the system
- **OSO: Lead Share Application ID:** Application ID
- **OSO: Lead Share Company Code:** The company code which you registered on the LETS server
- **OSO: Lead Share Responsibility ID:** The default responsibility of the sales person who is assigned the opportunities
- **OSO: Lead Share Host Name:** The host name of the LETS server
- **OSO: Lead Share Port Number:** The port number of the LETS server
- **OSO: Lead Share Proxy Host:** The proxy host name of the LETS server
- **OSO: Lead Share Proxy Port:** The port number of the proxy host name of the LETS server
- **OSO: Lead Share Partner ID:** Partner ID generated from the LETS server
- **OSO: Lead Share Mail From**: In case of error, in the data send and fetch between partners, an email is sent from this user.
- **OSO: Lead Share Mail To**: In case of error in the data send and fetch between partners, an email is sent to this user.
- **OSO: Lead Share Mail CC**: In case of error in the data send and fetch between partners, an email is carbon copied to this user.
- **OSO: Lead Share Send Flag**: Y/N send email when an API error occurs during send or fetch data between partners. Default is N.

Step 10: Setting Up Security Profiles

Access privileges to customer and opportunity information are based on a combination of the following profile options:

- OS: Customer Access Privilege
- OS: Opportunity Access Privilege
- OS: Manager Update Access
- OS: Sales Admin Update Access

Security Profiles

<table>
<tr><th>Security Profile</th><th>Description</th></tr>
<tr><td>OS: Customer Access Privilege

OS: Opportunity Access Privilege</td><td>"F" (Full): User can view and update all customers and opportunities in the user’s organization. Generally, this access is given to super users only.

"O" (Full by Organization): This applies to opportunity only. The user can view and update all opportunities within their sales team. However, they are allowed to view and update data within <u>their</u> HR organization only.

"P" (Prospecting): User can view all customers and opportunities. Users can update only customers and opportunities within their sales team. Users can create only opportunities for customers for which they are on the sales team.

"T" (Sales Team Access): User can view only those customers within their sales team. Within Sales Online, under the Sales Team link, there is a check box called "Full Access". Selecting this check box determines whether the sales team member has full access (is able to update information) or not for this record. If a user does not have full access, the record is view only. The user will see a lock icon next to a record for which he/she does not have access.</td></tr>
<tr><td colspan="2">Party relationship (contact) access is based on a combination of customer and opportunity access. Tasks, Notes, Interactions, and Attachments access are based on either customer or opportunity access. For example, if you have access to the opportunity, you also have access to the notes and attachments for that opportunity.</td></tr>
<tr><td>OS: Manager Update Access</td><td>The Manager (as defined in JTF Resources) has access to the records that their subordinates can access.

"U": User can always update subordinate’s data.

"I": User inherits subordinate’s access privileges.

The Manager/Admin can update certain customer and opportunities if any of their subordinates can update those customers or opportunities.

"R": User can only view subordinate’s data.</td></tr>
</table>

Security Profile	Description
OS: Sales Admin Update Access	The Administrator (as defined in JTF Resources) has access to the records that their group manager can access. "**U**"**:** User can always update manager data. "**I**"**:** User inherits manager access privileges. The Manager/Admin can update certain customer and opportunities if any of their subordinates can update those customers or opportunities. "**R**"**:** User can only view subordinate's data.

The seeded role "Account Manager", provides special access privileges to the user. While an Account Manager on a customer sales team has access to all of the opportunities for this customer, a regular user would only have access to the opportunities for their own sales team.

The following table describes the customer access privileges.

Customer Access Privileges

Access Type	View Access	Create Access	Update Access
Full	All customers	Managers/Reps can create customers. Those with admin role cannot create customers.	All customers
Prospecting	All customers	Managers/Reps can create customers. Those with admin role cannot create customers.	The team members can update customer information for which they are on the sales team. If update access profile equals "U", the user can update subordinates customers. If update access profile equals "I", then the user can update certain customers (customers that their employees can update).
Sales Team	Only customers for which the sales rep is on the sales team.	Managers/Reps can create customers. Those with admin role cannot create customers.	Only customers for which the sales rep is on the sales team.

Sales Team (Managerial Access)	All customers that subordinates have access to, plus any other customers based on user's individual access.	All customers	If update access profile equals "U", the manager can update their subordinates customers. If update access profile is "I", the manager can update certain customers (customers that their employees can update).
Sales Team (Administrator Access)	All customers that administrators, employees, and managers have access to.	None	If update access profile is "U", the admin can update subordinates customers. If update access profile is "I", the admin can update certain customers (customers that their employees can update).

The following table describes the opportunity access privileges.

Opportunity Access Privileges

Access Type	View Access	Create Access	Update Access
Full by Organization	All opportunities for certain operating units. The opportunities for which the sales rep is on the sales team.	All opportunities for certain customers. The user, with admin role, cannot create opportunities.	All opportunities for certain operating units. The opportunities for which the sales rep is on the sales team with full access.
Full	All opportunities	All opportunities.	All opportunities.
Prospecting	All opportunities	Same as above.	The sales rep with full access can update all information for opportunities for which they are on the opportunity sales teams. If update access profile equals "U", the user can update subordinates opportunities. If update access profile equals "I", the user can update opportunities that their subordinates can update.

Sales Team (Full Access)	Only opportunities for which the sales rep is on the sales team Account manager can view opportunities for their subordinates.	Same as above.	Only opportunities of customers for which the sales rep is on the sales team.
Sales Team (not Full Access)	Same as above.	Same as above.	Based on individual access.
Sales Team (Managerial Access)	All opportunities that subordinates have access to, plus any others based on individual access. Account manager can see all opportunities for customer they manage.	Same as above.	If update access profile equals "U", the user can update their subordinates opportunities. If update access profile equals "I", the user can update opportunities that their subordinates can update.
Sales Team (Administrator Access)	All opportunities that administrators, employees, and managers can access. Account manager can see all opportunities for customers they manage.	Same as above.	If update access profile equals "U", the user can update subordinates opportunities. If update access profile equals "I", the user can update opportunities that their subordinates can update.

Step 11: Oracle Sales Online Lookup Codes

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

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

- Oracle Order Management Lookup Codes, which are specific to the Oracle Sales product family.
- Oracle CRM Foundation Lookup Codes, refer to *Oracle CRM Foundation Components Implementation Guide*.

Viewing Oracle Sales Lookup Code Values

Follow this procedure to view Oracle Sales Lookup Code values.

Steps

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

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

Note: Alternatively, press F11, then while pressing F11 press the Control key to view the lookup code values.

Modifying Lookup Code Values

There are three access levels for Lookups:

- User
- Extensible
- System

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

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

System access level Lookups are not modifiable.

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

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

Steps

Navigate to the Lookup you want to modify.

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

Lookup Code Tables

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

Oracle Sales-Specific Lookup Code Values

Sales Lookup	Description	Access Level	Seeded Values & Meaning
ACCESS_PRIVILEGE	Access privilege for employee	S	F (Full unrestricted access) P (Prospecting Access) T (Sales Team Access)
ASTATA_RUN_MODE	Run mode for Territory Assignment concurrent program	S	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)
AUTO_ASSIGNMENT_TYPE	Automatic assignment type	S	Both None PRM TAP

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

Sales Lookup	Description	Access Level	Seeded Values & Meaning
PRM_ASSIGNMENT_TYPE	PRM assignment type	S	Broadcast Serial Single Unassigned
PRM_LEAD_TYPE	PRM lead type	S	Direct Indirect
ROLE_TYPE	Role Type	U	AM (Account Manager) PS (Product Specialist)
SCD_REFRESH_MODE	Sales Credit Denorm refresh mode	U	1 (Complete refresh) 2 (Incremental refresh)
SCD_RUN_MODE	Sales Credit Denorm Run Mode	E	1 (Complete) 2 (Update)
UPDATE_ACCESS	Update Access	S	I (Inherit data) R (View data) U (Update subordinate's data)

Oracle Accounts Receivable Lookup Code Values

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

AR Lookup	Description	Access Level	Seeded Values & Meaning
CONTACT_ROLE_TYPE (continued)	Contact Role Type	E	MARKET (Market) MIDDLE_MANAGER (Middle Manager) PRIMARY_CONTACT_FOR (Primary Contact For) RECEIVING_CONTACT_FOR (Receiving Contact For) SHIPPING_CONTACT_FOR (Shipping Contact For) SHIP_TO (Ship To) STMTS (Statement) STOCK_HOLDER_OF (Stock Holder) TECHNICAL_CONTACT_FOR (Technical Contact For)
CONTACT_TITLE	Contact Title	E	DR (Dr.) MISS (Miss) MR (Mr.) MRS (Mrs.) MS (Ms.) SIR (Sir)
CUSTOMER_CATEGORY	Customer Category	E	CUSTOMER (Customer) PROSPECT (Prospect)

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

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

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

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

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

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

AR Lookup	Description	Access Level	Seeded Values & Meaning
RESPONSIBILITY	Responsibility	E	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Receivable Supervisor) CFO (CFO) COLCT (Collection) COLCTSUP (Collection supervisor) CONTRLR (Controller) GLC (General ledger clerk) GLS (General ledger supervisor) SOC (Sales operation clerk) SOS (Sales operations supervisor) TRSUR (Treasurer)

Oracle Order Management Lookup Values

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

Step 12: Setting System Profile Options

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

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

Profile options can be set at four levels:

- **Site:** Indicates that the profile option is set at the site level. The site level setting affects the entire database.

- **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.
- **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.
- **User:** This setting affects individual users. When set, it overrides values set at the site, application, and responsibility levels.

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

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- HZ: (Trading Community Architecture)

Setting or Changing Profile Options

Use this procedure to set or change profile options.

Steps

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

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

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

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

Oracle Sales Online Application Profiles

Functional Area	Profile Name	Profile Description	Default Value
	OSM: Create Tasks Flag	*AS_SM_CREATE_TASKS*	
	OSO: Search Lead Wildcard	ASF_SEARCH_LEAD_WILDCARD	
Access	OS: Customer Access Privilege	Customer Access Privilege (Full, Prospecting, Sales Team)	Full
Access	OS: Customer Sales Team Default Role Type	Customer Sales Team Default Role Type (Account Manager or Product Specialist and any user defined roles)	Account Manager
Access	OS: Manager Update Access	Manager Update Access (U) Update (I) Inherit access privilege (R) View data	View Data
Access	OS: Opportunity Access Privilege	Opportunity Access Privilege Global Full Full Prospecting Sales Team	Global Full
Access	OS: Sales Admin Update Access	Sales Update Admin Access Update (U) Inherit access privilege (I) View Data (R)	View Data (R)
Access	OS: Sales Lead Access Privilege	Lead Access Privileges Full Prospecting Sales Team	Full
Activity	OSO: Default Activity Priority*	Default Activity Priority	High
Activity	OSO: Default Activity Status*	Default Activity Status	Open

Functional Area	Profile Name	Profile Description	Default Value
Activity	OSO: Default Activity Type*	Default Activity Type	Appointment
Activity	OSO: Default number of days to filter tasks	Display tasks for the last <n> days	180
Customer	OS: Enable Customer LOV Security	AS_ENABLE_CUST_LOV_SECURITY Determine whether the customer list of values will be restricted or not. If set to Yes, customer list of values will have security enforced based on the profile; OS: Customer Access Privilege setting, when creating an opportunity.	No
Customer	OS: Execute TCA API Callouts for Mobile Sales	AS_HZ_EXECUTE_CALLOUTS	N
Customer	OSO: Default Address Lines*	Default Address Lines	2
Customer	OSO: Default Address Type	Default Address Type	Marketing
Customer	OSO: Default Customer Category*	Default Customer Category	Customer
Customer	OSO: Default Organizational Relationship*	Default Org Relationship	Employer of
Customer	OSO: Default Person Phone Type*	Default Person Phone Type	General
Customer	OSO: Default Person Relationship*	Default Person Relationship	Employee
Customer	OSO: Default Organization Phone Type*	Default Organization Phone Type	General
Forecast	OS: Daily Conversion Type	Currency conversion type for daily conversion rates.	Corporate
Forecast	OS: Date Mapping Type	Currency conversion date	Start date of a period
Forecast	OS: Forecast Calendar	Name of the calendar you are using to manage your forecasts	
Forecast	OS: Forecast Current Freeze Period	Rolling Forecast Current Freeze Period label	
Forecast	OS: Forecast Freezing Enabled	Forecast Freezing for Rolling Forecast enabled or not	No

Functional Area	Profile Name	Profile Description	Default Value
Forecast	OS: Forecast Price List	Price List for Sales Forecast and Opportunity	
Forecast	OS: Forecast Price Volume Margin	Revenue Volume correspondence tolerance margin	
Forecast	OS: Forecast Rolling Calendar Periods	Number of periods in forecast rolling calendars	
Forecast	OS: Forecast Status Confidence	Forecast status confidence for MRP integration	
Forecast	OS: Use Forecast Materialized View*		No
Forecast	OSO: Default Forecast Currency*	Default Forecast Currency	
Forecast	OSO: Default Forecast Period Type*	Default Forecast Period Type	None
Forecast	OSO: Default Forecast Worksheet Lines*	Default Forecast Worksheet Lines	0
Forecast	OSO: Display Opportunity Worksheet Grand Totals*	Display Opportunity Worksheet Grand Totals (Obsolete)	No
Forecast	OSO: Display Subordinate Current Pipeline*	Display Subordinate Current Pipeline	Yes
Forecast	OSO: Forecast Autosubmit Worksheets	ASF_FRCST_AUTOSUBMIT_WKST Used to set the default worksheet to be submitted when reps submit forecasts.	Null
Forecast	OSO: Forecast Calendar Month	The number of periods available for forecasting.	3
Forecast	OSO: Forecast Max Generate Months	ASF_FRCST_MAX_GEN_MONTHS The maximum number of months that can be submitted on the Generate Forecast page.	6
Forecasting	OSO: Display Opportunity Worksheet Grand Totals	ASF_FRCST_DISPLAY_GRAND_TOTALS If set to Yes, the total line/numbers will be displayed on the opportunity worksheet.	No
Fulfillment	JTF_FM_CREATE_DEST	(Value) asfCntctAdsrhMain.jsp	
General	FND: Message Level Threshold		Success
General	OS: Preferred Reporting Currency	Preferred Currency for Denorm Programs	US Dollar

Functional Area	Profile Name	Profile Description	Default Value
General	OSO: Application Utility Class	ASF_APPLICATION_UTILITY_CLASS Used internally by application-not intended to be reset	oracle.apps.asf.util.OsoAppUtility
General	OSO: Debug Message On		No
General	OSO: Default Country*	Default Country	United States
General	OSO: Default Note Type*	Default Note Type	User Generated Note
General	OSO: Default Notes Display Days*	Display notes for the last <n> days	180
General	OSO: Default Sales Group and Role*	Default Sales Group and Role to use for log in	XXXXX
General	OSO: Display Tracking Information*	Flag indicates whether to show tracking data	Yes
General	OSO: Enable Record Count*	Enable the record count	No
General	OSO: Max Attachment Size	Determines the maximum attachment size (in bytes)	100,000
General	OSO: Minimum Search String Length	Minimum Search String Length	4
General	OSO: Number of News Headlines	Number of news items to display for each ticker symbol the user selects	5
General	OSO: SQL Trace On		No
Leads	OS: Move Sales Leads	AS_MOVE_SALES_LEADS	
Opportunity	OS: Maximum Roll Days for Converting Amount	Maximum Roll Days for converting amount if no conversion rate for a day	
Opportunity	ASO: Product Organization	Org id used in inventory items to display (mandatory)	
Opportunity	OS: Allow Updating Frozen Opportunities	When set to yes, users can update frozen opportunities	Yes
Opportunity	OS: Compensation Sales Credit Type	Compensation Sales Credit Type	

Functional Area	Profile Name	Profile Description	Default Value
Opportunity	OS: Customer Address Required for Opportunity Sales Lead	Customer Address Required for Opportunity and Sales Lead	No
Opportunity	OS: Default Close Date Days*	Default Opportunity close date days	30
Opportunity	OS: Default Opportunity Sales Stage*	Default Sales Stage	Stage 1
Opportunity	OS: Default Opportunity Status*	Default Opportunity Status	Prelimina ry
Opportunity	OS: Default Opportunity Win Probability*	Default Opportunity Win Probability	10-Prospe cting (Qualified)
Opportunity	OS: Default Sales Channel*	Default Sales Channel	Direct
Opportunity	OS: Forecast Sales Credit Type	Forecast Credit Type for Opportunity Sales Credits (mandatory)	
Opportunity	OS: Generate Opportunity System Notes	Determines whether or not notes are generated when parts of the opportunity change	Yes
Opportunity	OS: Inventory Category Integration	Flag to populate inventory categories for Oracle Sales	Yes
Opportunity	OS: Move Opportunities	AS_MOVE_OPPORTUNITIES	
Opportunity	OS: Opportunity Probability Link	Determines whether a warning or an error is given if the win probability amount does not fall within the sales stages probabilities	Warning
Opportunity	OS: Opportunity Sales Credit Enforce Sales Team Definition	Salesperson cannot be removed from the sales team if they have sales credits	Yes
Opportunity	OS: Opportunity Sales Team Default Role Type	AS_DEF_OPP_ST_ROLE The role set with this profile will be used as default when creating sales team entry for opportunity.	Null
Opportunity	OS: Sales Methodology*	Sales Methodology	Object Oriented
Opportunity	OS: Sales Team Creator Keep Flag	Default keep flag for sales team creator	
Opportunity	OSO: Default Sales Methodology	ASF_DEFAULT_SALES_METHODOLOGY	Object Oriented

Functional Area	Profile Name	Profile Description	Default Value
Opportunity	OSO: Enable Lead Share	Display Opportunity Exchange button	No
Opportunity	OSO: Enable Product Category in Opportunity Advanced Search	ASF_PRODUCT_CATEGORY_SEARCH This profile is used in Opportunity Advanced Search. If set to Yes, then product category multi-select list will show up and let users search on product category.	Null
Opportunity	OSO: Enable Quote	If set to yes, displays Create Quote button on Opportunity page.	No
Opportunity Exchange	OSO: Lead Share Mail CC	In case of error in the data send and fetch between partners, an email is carbon copied to this user.	
Opportunity Exchange	OSO: Lead Share Mail From	In case of an error in the data send and fetch between partners, an email is sent from this user.	
Opportunity Exchange	OSO: Lead Share Mail To	In case of error in the data send and fetch between partners, an email is sent to this user.	
Opportunity Exchange	OSO: Lead Share Send Flag	Y/N Send email when an API error occurs during send or fetch data between partners.	N
Opportunity Exchange	OSO: Enable Lead Share	The profile option to enable opportunity sharing throughout the system	No
Opportunity Exchange	OSO: Lead Share Application ID	Application ID	522
Opportunity Exchange	OSO: Lead Share Company Code	The company code which you registered on the LETS server	
Opportunity Exchange	OSO: Lead Share Host Name	The host name of the LETS server	
Opportunity Exchange	OSO: Lead Share Partner ID	Partner ID generated from the LETS server	
Opportunity Exchange	OSO: Lead Share Port Number	The port number of the LETS server	
Opportunity Exchange	OSO: Lead Share Proxy Host	The proxy host name of the LETS server	

Functional Area	Profile Name	Profile Description	Default Value
Opportunity Exchange	OSO: Lead Share Proxy Port	The port number of the proxy host name of the LETS server	
Opportunity Exchange	OSO: Lead Share Responsibility ID	The default responsibility of the sales person who is assigned the opportunities	
Partner	PV: Default Vendor Org		
Partner	PV: User Type		Sales Rep
Preferences	ICX: Date Format Mask*	Date Format Mask	31-Dec-99
Preferences	ICX: Language*	Language	American English
Preferences	JTF_PROFILE_DEFAULT_APPLICATION	(Value) 522. This profile option must be set at the user level only	
Preferences	JTF_PROFILE_DEFAULT_BLANK_ROWS*	Number of blank rows to show in table to create new rows	3
Preferences	JTF_PROFILE_DEFAULT_CSS*	This profile must be set at the user level only.	jtfucss.css
Preferences	JTF_PROFILE_DEFAULT_CURRENCY*		USD
Preferences	JTF_PROFILE_DEFAULT_NUM_ROWS*	Number of rows of data to display in table	15
Preferences	JTF_PROFILE_DEFAULT_RESPONSIBILITY*	(This profile must be set at the user level only. (Values) The values are seeded responsibilities: User (22405), Manager (22406), Administrator (22477).	
Sales Comp	OSO: Default Sales Comp Period Type	Default Sales Comp Period Type	
Territory	HZ: Execute API Call Outs		Yes
Territory	OS: Enable Real Time Opportunity and Customer Assignment	AS_ENABLE_ONLINE_TAP If set to Yes, customer and opportunity sales team will be created and updated at the time of creating and updating opportunity and customer.	No
Territory	OS: Territory Minimum Number of Records for Parallel Processing	Minimum number of records for parallel processing	100

Functional Area	Profile Name	Profile Description	Default Value
Territory	OS: Territory Number of Child Processes	Number of Child Processes	1
Territory	OS: Territory Records to Commit	Maximum number of records to commit for AS_TERRITORY_ACCESSES and AS_ACCESSES tables	1000
Territory	OS: Territory Records to Open for Processing Changed Accounts	Number of records to process per open cursor period, for processing changed accounts	10,000
Upgrade	OS: Interest type master org id	AS_INT_MASTER_ORG_ID Master org id is required for Marketing Online interest type migration script. It is used while upgrading from 3i to lli.	
Wireless		JTFW_PROFILE_DEFAULT_WIRELESS_RESPONSIBILITY	

Step 13: Setting Up Note Types

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

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

Use the following procedure to set up note types.

Steps

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

   The Application Object Library: Note Type Lookups window appears.

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

Deleting an Existing Note Type

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

Mapping Note Types to a Source

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

Step 14: Setting Up Territory Management

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

Steps

1. Run the concurrent program "Generate Territory Package".
2. Run the concurrent program "Territory Denormalization Refresh".

You can assign sales team members using two modes:

- Batch mode

  In this mode you must schedule the "Assign Territory Access" concurrent program to run at specific intervals.

- Online Mode

  If you set the profile option, "OS: Enable Real Time Opportunity and Customer Assignment", to Yes, customer and opportunity sales teams are created and updated based upon territory guidelines.

Please note the following:

If the profile option "OS: Enable Real Time Opportunity and Customer Assignment" is set to "No", you can still assign opportunities and customers using the batch mode.

If the profile option "OS: Enable Real Time Opportunity and Customer Assignment" is set to "Yes", and you do not use the batch mode, then if the territory setup is changed, the sales team assignments to opportunities and customers will not reflect these changes unless the batch program is run.

Step 15: Setting Up Task Manager

Steps

1. Choose **CRM Foundation > Task Manager > Setup**.

Sales Online Task functionality includes the following:

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

Step 16: Setting Up Interaction History

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

Step 17: Setting Up Marketing Encyclopedia

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia Concepts and Procedures.*

Step 18: Setting Up Marketing Campaigns

Refer to the *Oracle Marketing Concepts and Procedures* guide for information about this topic.

Step 19: Setting Up Fulfillment

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

Step 20: Setting Up Partners

Refer to the *Oracle Partner Relationship Management Implementation Guide* for information about setting up Partners.

Step 21: Setting Up Compensation

Refer to the *Oracle Sales Compensation Implementation Guide* for information about setting up Compensation.

Step 22: Running Concurrent Programs

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

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

Concurrent Programs Used by Sales Online

Sales Online includes the following concurrent programs:

Oracle Sales Online Concurrent Programs

Concurrent Program Name	Description	Recommended Run Frequency
Assign Territory Accesses (optional)	This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting two profile options: OS: Territory Minimum Number of Records for Parallel Processing OS: Territory Number of Child Processes	Run this program after completing the setups Setting Up Territory Management, and after the JTF Concurrent programs, "Generate Territory Package" and "Territory Denormalization Refresh" have been run.
Autocreate Opportunity from Sales Lead	Create opportunities from existing sales leads. Parameters are: Debug Mode or Trace Mode	This program should be run after the Import Sales Leads program.
Generate Access Records (optional)	This is a child program of Assign Territory Accesses	This program does not require running separate from Assign Territory Access.
Import Sales Leads	This program imports sales leads from the interface table.	According to business needs

Concurrent Program Name	Description	Recommended Run Frequency
Incremental refresh of AS_MC_SALES_CREDITS_DEN	Used to refresh sales credits multi-currency table.	This program should be run after adding any new reporting currencies (using Reporting Currency Mapping form) or after changing any conversion rates or profile options related to multi-currency setup.
Incremental refresh of AS_SALES_CREDITS_DEN	From, To	Run this program to set up home page Run this program every time you apply a patch
Initial Build of Forecast Summary Tables (mandatory)	This program will build the materialized view used for forecasting.	This program must be run initially before users can forecast.
Initial Build of Opportunity and Lead Bins (mandatory)	Used for the Opportunity home page bins. This program must be run initially before users can set up opportunity bins. This program loads the opportunity and leads materialized view with sales credit information. No parameters are needed.	This program must be run anytime the as_sales_credit_denorm is rebuilt or when values such as sales stages and statuses have changed. You should also run when Refresh AS_PERIOD_DAYS is run. Run this program every time you apply a patch.
Initial Load for Leads Reports		Run this program every time you apply a patch.
Initial Load for Opportunities Reports		Run this program every time you apply a patch.
Load Interest Types and Codes to Inventory Categories (Load Categories)	This concurrent program creates inventory categories under the inventory category set "Oracle Sales and Marketing" for each combination of interest types and codes. In order to use this concurrent program, the OS: Inventory Category Integration profile value must be set to Yes.	
Load Sales Lead Interface Table from Flat File	This program imports sales leads data from a flat file into an interface table.	According to business needs

Concurrent Program Name	Description	Recommended Run Frequency
Opportunity Exchange-Get Opportunities	This program will poll the LETS server and retrieve the relevant partner opportunity details.	This program should be run at regular intervals by users with Opportunity Exchange privileges.
Opportunity Exchange-Push Opportunities	This program will send the information to the LETS server to be picked up by the partners.	This program should be run at regular intervals by users with Opportunity Exchange privileges.
OTS: Lead Generate	Use this program to import sales leads from the interface. If you want to import data from a flat file, you must first run OTS: Load Sales Lead, which will move data from the flat file to the interface table.	This program must be run before Auto Create Opportunity from Sales Lead. This moves data from the interface table to AS_SALES_LEADS, AS_SALES_LEADS_LINES, and AS_SALES-LEAD_CONTACTS.
Refresh AS_PERIOD_DAYS table (mandatory)		This program must be run before you can run the Refresh of as_sales_credits_denorm (in complete mode), Initial Build of Opportunity Bins, and the Build Materialized View for Forecast Main Page. This sequence of programs must be rerun if the GL period definitions are changed.
Refresh of AS_SALES_CREDITS_DENORM (Complete and Incremental)	Used for opportunity reports and forecasting functionality. Parameters are: Refresh Mode Complete refresh=Use this mode when running for the first time or doing a complete refresh). Incremental Refresh=Run in this mode for an incremental refresh.	This program must be run before user can run opportunity reports and perform forecasting functions.
Refresh of Forecast Summary Tables (mandatory)	This program is used to refresh the materialized view used for forecasting.	This program should be run periodically.
Refresh of Leads Bins Data		Run daily

Concurrent Program Name	Description	Recommended Run Frequency
Refresh of Leads Reports	This program is used to refresh the leads reports.	
Refresh of Opportunity Bins Data (mandatory)	This program is used to run an incremental refresh of the materialized view used for the opportunity bins. This program should be scheduled to run periodically.	Users will not see opportunities in bins created after the last refresh of "refresh sales credit".
Refresh of Opportunity Reports	This program is used to refresh the opportunity reports.	
Setup Checking for Oracle Sales Application	This program validates Sales Setups and produces an error log that the System Administrator can use to diagnose invalid setups. Parameters are: Upgrade-Yes / No	

Running Concurrent Programs

Every time you apply a patch the following concurrent programs must be run.

- Initial Build of Opportunity Bins
- Refresh of Opportunity Bins Data
- Refresh Lead Bins Data

Use the following procedure to run concurrent programs.

Steps

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

Step 23: Setting Up Descriptive Flexfields

Refer to the *Oracle Applications Flexfield Guide* for detailed information about setting up descriptive flexfields.

Descriptive flexfields that use table validation or are dependent flexfields are not supported in Sales Online.

Step 24: Setting Up Blind Search for LOV (list of values)

You can use an AK region, ASF_LOV_BLIND_SEARCH, to relax the blind search restrictions. This region contains the names for the LOVs that should be excluded from the blind search restriction.

Please note, this function applies to lists of values that are above or in tables only.

Steps

1. Navigate **(AK Developer) Define Regions > Query ASF_LOV_BLIND_SEARCH** > Click the **Region Items** button.
2. Add the LOVs attribute ID as a region item for this region. Attribute Type (Attribute), Application (Oracle Sales Online), Attribute Name (See table below), Sequence (#), Item Style (text).
3. Bounce the Apache (mid-tier) and clear the cache.

LOV Attribute IDs

Attribute IDs	List of Values (LOVs)
ASF_FS_CAMPAIGN_LOV	Campaign
ASF_FS_CMPTR_LOV	Competitor
ASF_FS_CSTMR_LOV	Customer
ASF_FS_EMPLY_LOV	Employee
ASF_FS_OPPTY_LOV	Opportunity
ASF_FS_ORGADDR_LOV	Organization Address
ASF_FS_ORGZN_ADDRE_LOV	Organization Address in Person Detail
ASF_FS_ORGZN_LOV	Organization
ASF_FS_PERSN_LOV	Person
ASF_FS_PRDCT_LOV	Product

Attribute IDs	List of Values (LOVs)
ASF_FS_PRJCT_LOV	Project
ASF_FS_PRTNR_LOV	Partner
ASF_FS_PURLN_LOV	Purchase Lines
ASF_FS_RELAT_LOV	Relationship
ASF_FS_SALESREP_LOV	Sales Rep
ASF_FS_SALESREP_SEC_LOV	Sales Rep with Security
ASF_FS_SLSGP_LOV	Sales Group
ASF_FS_SIC_LOV	SIC code (Standard Industry Code)

Step 25: Setting Up Lead Import and Import Leads

Importing leads into the database requires you to:

1. Set up lead import.
2. Import leads from a flat file or populate the lead interface table.
3. Check for and fix any errors.

   The About Existence Checking section at the end of this step gives you a detailed overview of duplicate checking.

25a) Setting Up Lead Import

Use this procedure to set up lead import.

Steps

1. Set up system profile options for lead import.

   Three are used by the TCA API to generate keys for customers, addresses, and contacts:

   - HZ: Key Word Count

     The number you enter in this profile option determines how many words in the customer name are used to generate keys. For example, a setting of 2 means that only the first two words in the name are used.

   - HZ: Address Key Length

- HZ: Postal Code Key Length

The following system profile option is used by the lead import process itself:

- OS: Default Resource ID Used for Sales Lead Assignment

  Set this system profile option to the resource who is to handle any leads that are not assigned to any current territory.

2. Set up word replacement rules by logging in under the Receivables Manager Responsibility and navigating to **Setup > Word Replacement Rules**.
3. Run the following concurrent programs:
   - Generate Territory Packages. This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
   - Territory Denormalization Refresh. This program, available by logging in under the CRM Administration responsibility, creates a search index for faster performance of the territory management module. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
   - Generate Keys for Fuzzy Match. This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically.

25b) Import Leads from a File or Populate the Lead Interface Table

Use this procedure to import leads into the database from a flat file or by entering data directly into a lead interface table. The lead import assigns the leads automatically to the appropriate agents via the Oracle eBusiness suite’s Territory Management module.

Prerequisites

- You must be familiar with running concurrent programs as described in the *Oracle Applications Systems Administrator’s Guide.*

- You must be familiar with Oracle SQL Loader as described in the *Oracle 8i Utilities* guide.
- You must be familiar with running SQL Plus database queries.
- Before importing leads you must successfully run the following concurrent programs:
  - Generate Territory Packages. This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
  - Territory Denormalization Refresh. This program, available by logging in under the CRM Administration responsibility, improves the performance of the territory management module by creating a search index. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
  - Generate Keys for Fuzzy Match. This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically.

Steps

1. To import leads from a file:

   a. FTP the tab-delimited file with lead data to a directory on the server. The file must have a file name with the extension `.dat` and the structure described in the Guidelines section below.

   Note: The data in your import file must contain the required fields and the Load Status of each record must be `NEW`.

   ---

   b. In the same directory, create an Oracle SQL Loader parameter file. This file, which the Lead Import program refers to as the P_DATAFILE can have any name of your choosing. Here is what a sample P_DATAFILE file may look like:

```
userid=<username>/<password>
control=ASTSLIMP.CTL
data=<path><lead import data file name>.dat
```

Please refer to *Oracle 8i Utilities* guide for more information.

c. Log in under the Oracle TeleSales Administration responsibility.

d. Run the Load Sales Lead Interface Table from Flat File concurrent program. This program populates the lead interface table (AS_IMPORT_INTERFACE). To run the program you must know the absolute path to the P_DATAFILE you created in the previous step.

2. After loading leads into the lead interface table, run the Lead Import concurrent program. This program:

- Checks the validity of the data in the leads you are importing. Any records that are missing data in required fields or contain corrupt data are not imported. They remain in the lead interface table and are flagged by the program with the load status of `Error`.
- Checks the database for duplicates of customer, address, contact, contact point, and restriction information before creating new records. Please see About Existence Checking below for a detailed explanation.

Note: The concurrent program checks for duplicate customer records by comparing the data being imported and existing customer records. It does not check for duplicates in the data you are importing itself. This means that if you have duplicate entries in the data you import, the program will create the same duplicates in the database.

- Generates customer keys for all new parties created in the database.
- Assigns the imported leads to the sales territories set up in the CRM Territory Management module. If the program does not find a territory to match an imported lead, then it assigns that lead to the person selected in the system profile option OS: Default Resource ID Used for Lead Assignment. If you do not set this profile, the leads are assigned to the user who is running the program.

3. After the Lead Import program has run successfully, you are ready to check for and correct any errors.

> **Note:** The lead import concurrent program may run without any errors, but you may still have corrupt or missing data in the imported leads. You must check for errors in your data to ensure that leads have been successfully imported. The program writes errors into the as_lead_import_errors table.

Guidelines

The flat file you are importing leads from must be a tab-delimited file. The file name must have the extension `.dat` (For example, `mynewleads.dat`). Each lead must contain the fields listed in the table below. Please note:

- As the leads you import are not deleted from the interface table AS_IMPORT_INTERFACE even after they are successfully imported into the database, you should enter different batch ID in each import file to make sure you can distinguish between runs.
- You must provide valid values to these columns. This means running SQL*Plus queries to obtain some of the values required by this table. The columns you must query and sample queries for your use are listed in the Valid Values column.
- Lead import records can contain null fields except for the required fields noted below.
- A Yes entry in the Table Requires Entry column means that a null or incorrect entry in the field results in a database error.
- A Yes entry in the Import Requires Entry column means that the import of the record will fail if this field is null or of the wrong data type.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
IMPORT_INTERFACE_ID	NUMBER	Yes	Yes	as_import_interface_s	
LAST_UPDATE_DATE	DATE	Yes	Yes		
LAST_UPDATED_BY	NUMBER	Yes	Yes		
CREATION_DATE	DATE	Yes			
CREATED_BY	NUMBER	Yes			

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LAST_UPDATE_LOGIN	NUMBER	Yes	Yes		
REQUEST_ID	NUMBER				]
PROGRAM_ APPLICATION_ID	NUMBER				] The concurrent program] generates these values
PROGRAM_ID	NUMBER				]
PROGRAM_UPDATE_ DATE	DATE				]]
IMP_LIST_HEADER_ NUMBER	VARCHAR 2(30)		Yes		]
LOAD_TYPE	VARCHAR 2(20)		Yes	LEAD_LOAD	Must be in uppercase letters
LOAD_DATE	DATE	Yes	Yes		
LOAD_STATUS	VARCHAR 2(20)		Yes	NEW	Must be in uppercase letters
LOAD_ERROR_ MESSAGE	VARCHAR 2(2000)				
PROMOTION_ID	NUMBER			select source_code_id from ams_source_codes where source_code = <as_import_ interface_rec>.promotion_id and active_flag = 'Y'	'Used for creating the sales lead header.
PROMOTION_CODE	VARCHAR 2(50)		Yes	select source_code from ams_source_codes where arc_source_code_for = 'CAMP' and active_flag = 'Y'	If promotion_id is null then this is used for creating the sales lead header.
CUSTOMER_ID	NUMBER(15)				
CUSTOMER_NAME	VARCHAR 2(255)		Yes		
CUSTOMER_NUMBER	VARCHAR 2(30)				
CUSTOMER_STATUS	VARCHAR 2(1)			A	Must be uppercase. A stands for active.
CUSTOMER_TYPE	VARCHAR 2(30)				Obsolete.
CUSTOMER_PROSPECT_ CODE	VARCHAR 2(30)				Obsolete.
CUSTOMER_CLASS_ CODE	VARCHAR 2(30)				Obsolete.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SALES_CHANNEL_ CODE	VARCHAR 2(30)			select sales_channel_code, sales_channel, description from aso_i_sales_channels_v where enabled_flag = 'Y'	Obsolete.
SIC_CODE	VARCHAR 2(30)			ar_lookups.lookup_code where lookup_type = '1987 SIC' and enabled_flag = 'Y'	
ANALYSIS_FY	VARCHAR 2(5)			Analysis physical year - no List of Values	
CUSTOMER_ CATEGORY_CODE	VARCHAR 2(30)			ar_lookups.lookup_code where lookup_type = 'CUSTOMER_CATEGORY' and enabled_flag='Y'	'
CUSTOMER_GROUP_ CODE	VARCHAR 2(30)			Leave this field null.	Obsolete.
CUSTOMER_KEY	VARCHAR 2(50)			Leave this field null.	Obsolete.
CUSTOMER_ SUBGROUP_CODE	VARCHAR 2(30)			Leave this field null.	Obsolete.
FISCAL_YEAREND_ MONTH	VARCHAR 2(30)				Free text format
NET_WORTH	NUMBER				Free text format.
NUM_OF_EMPLOYEES	NUMBER(15)				Free text format.
POTENTIAL_REVENUE_ CURR_FY	NUMBER				
POTENTIAL_REVENUE_ NEXT_FY	NUMBER				
CUSTOMER_RANK	VARCHAR 2(30)				Obsolete.
REFERENCE_USE_FLAG	VARCHAR 2(1)				Obsolete.
TAX_CODE	VARCHAR 2(50)				Obsolete.
TAX_REFERENCE	VARCHAR 2(50)				Obsolete.
THIRD_PARTY_FLAG	VARCHAR 2(1)				Obsolete.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
COMPETITOR_FLAG	VARCHAR 2(1)				Obsolete.
YEAR_ESTABLISHED	NUMBER(4)				
ADDR_DO_NOT_MAIL_ FLAG	VARCHAR 2(1)			If set to 'Y', no mails to customer site will be sent.	
URL	VARCHAR 2(2000)				
ADDRESS_ID	NUMBER(15)				
CONT_DO_NOT_MAIL_ FLAG	VARCHAR 2(1)			If set to 'Y', no mails will be sent to contact.	
ADDRESS_STATUS	VARCHAR 2(1)			A	
COUNTRY	VARCHAR 2(60)	Yes		select territory_short_name, territory_code, description from fnd_territories_vl	If country is supplied then address1 needs to be supplied and vice-versa.
ADDRESS1	VARCHAR 2(240)	Yes			
ADDRESS2	VARCHAR 2(240)	Yes			
ADDRESS3	VARCHAR 2(240)				
ADDRESS4	VARCHAR 2(240)				
CITY	VARCHAR 2(60)	Yes		select distinct location_ segment_description, location_segment_user_ value from ar_location_ values where location_ segment_qualifier = 'CITY'	
POSTAL_CODE	VARCHAR 2(60)	Yes		select min(p.from_postal_ code), max(p.to_postal_ code) from ar_postal_code_ ranges_v p, ar_location_ values a where p.location_ segment_id = a.location_ segment_id and a.location_ segment_qualifier | | '' = 'CITY' and a.location_ segment_value like 'X%'	

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
STATE	VARCHAR2(60)	Yes		select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = ’STATE’	
PROVINCE	VARCHAR2(60)	Yes		select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = ’PROVINCE’	
COUNTY	VARCHAR2(60)	Yes		select distinct location_segment_description, location_segment_user_value from ar_loaction_values where location_segment_qualifier = 'COUNTY’	
SITE_CONTACT_ID	NUMBER(15)				
EMAIL_ADDRESS	VARCHAR2(240)	Yes			
SEX_CODE	VARCHAR2(30)				
SALUTATION	VARCHAR2(60)			No LOV	Use this field for terms used for greeting the contact or for addressing a letter.For example, Excellency.
LAST_NAME	VARCHAR2(50)				
TITLE	VARCHAR2(30)			ar_lookups.lookup_code where lookup_type = 'CONTACT_TITLE' and enabled_flag = 'Y'	
FIRST_NAME	VARCHAR2(40)		Yes	Only first name is required.	
JOB_TITLE	VARCHAR2(50)	Yes		Free text may not be validated.	
PHONE_ID	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PHONE_NUMBER	VARCHAR2(25)	Yes			If possible area code should be separated if not the whole number will be stored in number.
PHONE_STATUS	VARCHAR2(1)		Yes	A	
PHONE_TYPE	VARCHAR2(30)			ar_lookups.lookup_code where lookup_type = 'PHONE_LINE_TYPE' and enabled_flag='Y'	
AREA_CODE	VARCHAR2(10)				
EXTENSION	VARCHAR2(20)				
LEAD_NUMBER	VARCHAR2(30)				
STATUS_CODE	VARCHAR2(30)			select status_code from as_statuses_b where lead_flag = 'Y' and enabled_flag = 'Y' and usage_indicator in ('ALL','OS')	
SOURCE_PROMOTION_ID	NUMBER			Null.	Not used by the program.
INITIATING_CONTACT_ID	NUMBER				
CONTACT_ROLE_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'LEAD_CONTACT_ROLE'	
CHANNEL_CODE	VARCHAR2(30)			select sales_channel_code from aso_i_sales_channels_v	
BUDGET_AMOUNT	NUMBER				
BUDGET_STATUS_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'BUDGET_STATUS'	
CURRENCY_CODE	VARCHAR2(15)			select currency_code from fnd_currencies where enabled_flag = 'Y'	
DECISION_TIMEFRAME_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'DECISION_TIMEFRAME'	

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CLOSE_REASON	VARCHAR 2(30)			select lookup_code from as_ lookups where lookup_type = 'CLOSE_REASON'	
LEAD_RANK_CODE	VARCHAR 2(30)				Obsolete. Do not populate.
PARENT_PROJECT	VARCHAR 2(80)				
DESCRIPTION	VARCHAR 2(2000)				
STATUS_CODE_1	VARCHAR 2(30)				Obsolete.
INTEREST_TYPE_ID_1	NUMBER			as_interest_types_v.interest_ type_id where master_ enabled_flag = 'Y'	
PRIMARY_INTEREST_ CODE_ID_1	NUMBER			as_interest_codes_v.interest_ code_id where interest_ type_id = <interest_type_id_ 1>	
SECONDARY_ INTEREST_CODE_ID_1	NUMBER			as_interest_codes_v.interest_ code_id where parent_ interest_code_id = <primary_interest_code_id_ 1>	You must make an entry if you entered a primary_ interest
INVENTORY_ITEM_ID_1	NUMBER			AS_INV_ITEM_LOV_ V.INVENTORY_ITEM_ID	
ORGANIZATION_ID_1	NUMBER			AS_INV_ITEM_LOV_ V.ORGANIZATION_ID where inventory_item_id = <inventory_item_id_1>	
UOM_CODE_1	VARCHAR 2(3)			AS_INV_UOM_V.UOM_ CODE where inventory_ item_id = <inventory_item_ id_1> and organization_id = <organization_id_1>	
QUANTITY_1	NUMBER				
BUDGET_AMOUNT_1	NUMBER				
STATUS_CODE_2	VARCHAR 2(30)				
INTEREST_TYPE_ID_2	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PRIMARY_INTEREST_CODE_ID_2	NUMBER				
SECONDARY_INTEREST_CODE_ID_2	NUMBER				
INVENTORY_ITEM_ID_2	NUMBER				
ORGANIZATION_ID_2	NUMBER				
UOM_CODE_2	VARCHAR2(3)				
QUANTITY_2	NUMBER				
BUDGET_AMOUNT_2	NUMBER				
STATUS_CODE_3	VARCHAR2(30)				
INTEREST_TYPE_ID_3	NUMBER				
PRIMARY_INTEREST_CODE_ID_3	NUMBER				
SECONDARY_INTEREST_CODE_ID_3	NUMBER				
INVENTORY_ITEM_ID_3	NUMBER				
ORGANIZATION_ID_3	NUMBER				
UOM_CODE_3	VARCHAR2(3)				
QUANTITY_3	NUMBER				
BUDGET_AMOUNT_3	NUMBER				
STATUS_CODE_4	VARCHAR2(30)				
INTEREST_TYPE_ID_4	NUMBER				
PRIMARY_INTEREST_CODE_ID_4	NUMBER				
SECONDARY_INTEREST_CODE_ID_4	NUMBER				
INVENTORY_ITEM_ID_4	NUMBER				
ORGANIZATION_ID_4	NUMBER				
UOM_CODE_4	VARCHAR2(3)				
QUANTITY_4	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
BUDGET_AMOUNT_4	NUMBER				
STATUS_CODE_5	VARCHAR 2(30)				
INTEREST_TYPE_ID_5	NUMBER				
PRIMARY_INTEREST_ CODE_ID_5	NUMBER				
SECONDARY_ INTEREST_CODE_ID_5	NUMBER				
INVENTORY_ITEM_ID_5	NUMBER				
ORGANIZATION_ID_5	NUMBER				
UOM_CODE_5	VARCHAR 2(3)				
QUANTITY_5	NUMBER				
BUDGET_AMOUNT_5	NUMBER				
INTERACTION_NOTES_1	VARCHAR 2(2000)				
PRIORITY_1	NUMBER(3)				
TODO_DATE_1	DATE				
TODO_START_TIME_1	VARCHAR 2(5)				
ACTIVITY_CODE_1	VARCHAR 2(30)				
INTERACTION_NOTES_2	VARCHAR 2(2000)				
PRIORITY_2	NUMBER(3)				
TODO_DATE_2	DATE				
TODO_START_TIME_2	VARCHAR 2(5)				
ACTIVITY_CODE_2	VARCHAR 2(30)				
INTERACTION_NOTES_3	VARCHAR 2(2000)				
PRIORITY_3	NUMBER(3)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
TODO_DATE_3	DATE				
TODO_START_TIME_3	VARCHAR 2(5)				
ACTIVITY_CODE_3	VARCHAR 2(30)				
INTERACTION_NOTES_4	VARCHAR 2(2000)				
PRIORITY_4	NUMBER(3)				
TODO_DATE_4	DATE				
TODO_START_TIME_4	VARCHAR 2(5)				
ACTIVITY_CODE_4	VARCHAR 2(30)				
INTERACTION_NOTES_5	VARCHAR 2(2000)				
PRIORITY_5	NUMBER(3)				
TODO_DATE_5	DATE				
TODO_START_TIME_5	VARCHAR 2(5)				
ACTIVITY_CODE_5	VARCHAR 2(30)				
INTERACTION_NOTES_6	VARCHAR 2(2000)				
PRIORITY_6	NUMBER(3)				
TODO_DATE_6	DATE				
TODO_START_TIME_6	VARCHAR 2(5)				
ACTIVITY_CODE_6	VARCHAR 2(30)				
INTERACTION_NOTES_7	VARCHAR 2(2000)				
PRIORITY_7	NUMBER(3)				
TODO_DATE_7	DATE				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
TODO_START_TIME_7	VARCHAR2(5)				
ACTIVITY_CODE_7	VARCHAR2(30)				
INTERACTION_NOTES_8	VARCHAR2(2000)				
PRIORITY_8	NUMBER(3)				
TODO_DATE_8	DATE				
TODO_START_TIME_8	VARCHAR2(5)				
ACTIVITY_CODE_8	VARCHAR2(30)				
INTERACTION_NOTES_9	VARCHAR2(2000)				
PRIORITY_9	NUMBER(3)				
TODO_DATE_9	DATE				
TODO_START_TIME_9	VARCHAR2(5)				
ACTIVITY_CODE_9	VARCHAR2(30)				
INTERACTION_NOTES_10	VARCHAR2(2000)				
PRIORITY_10	NUMBER(3)				
TODO_DATE_10	DATE				
TODO_START_TIME_10	VARCHAR2(5)				
ACTIVITY_CODE_10	VARCHAR2(30)				
LEAD_NOTE	VARCHAR2(2000)	Yes			
MIDDLE_INITIAL	VARCHAR2(10)	Yes			

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
FAX_NUMBER	VARCHAR2(25)				Area code must be separated, otherwise the whole number will be stored in the number column.
FAX_AREA_CODE	VARCHAR2(10)				
MAIL_STOP	VARCHAR2(60)	Yes			
NUM_ENROLLED	NUMBER(5)			Leave this field null.	Obsolete.
CONFIRMED_FLAG	VARCHAR2(1)			Leave this field null.	Obsolete.
PAYMENT_AMOUNT	NUMBER			Leave this field null.	Obsolete.
NUM_ATTENDED	NUMBER(5)			Leave this field null.	Obsolete.
PROMOTION_NAME	VARCHAR2(240)			Leave this field null.	Obsolete.
STATUS_CHANGE_FLAG	VARCHAR2(1)			Leave this field null.	Obsolete.
VEHICLE_RESPONSE_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'VEHICLE_RESPONSE_CODE' and enabled_flag = 'Y'	'
SOURCE_SYSTEM	VARCHAR2(250)		Yes	select lookup_code from as_lookups where lookup_type = 'SOURCE_SYSTEM' and enabled_flag = 'Y'	
CONTACT_PARTY_ID	NUMBER				
SECURITY_GROUP_ID	NUMBER				
PRM_SALES_LEAD_TYPE	VARCHAR2(30)				Partner specific.
PRM_EXEC_SPONSOR_FLAG	VARCHAR2(1)				Partner specific.
PRM_PRJ_LEAD_IN_PLACE_FLAG	VARCHAR2(1)				Partner specific.
INCUMBENT_PARTNER_PARTY_ID	NUMBER				Partner specific.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
INCUMBENT_PARTNER_ RESOURCE_ID	NUMBER				Partner specific.
OFFER_ID	NUMBER				
PRM_IND_ CLASSIFICATION_CODE	VARCHAR 2(30)				Partner specific.
PARTY_TYPE	VARCHAR 2(30)				
BATCH_ID	NUMBER(15)		Yes	as_sl_imp_batch_s.	Batch id of the load. BATCH_ID must be populated in as_import_ interface table before running the Import Sales Leads concurrent program.
PARTY_ID	NUMBER(15)			Leave this field null.	
PARTY_SITE_ID	NUMBER(15)			Leave this field null.	
LOCATION_ID	NUMBER(15)			Leave this field null.	
REL_PARTY_ID	NUMBER(15)			Leave this field null.	
SALES_LEAD_ID	NUMBER(15)			Leave this field null.	
ADDRESS_KEY	VARCHAR 2(500)			Leave this field null.	
CONTACT_KEY	VACHAR2(80)			Leave this field null.	
JOB_TITLE_CODE	VARCHAR 2(30)			ar_lookups.lookup_code where lookup_type = ’RESPONSIBILITY’ and enabled_flag = ’Y’	Stores the job title code.
DO_NOT_PHONE_FLAG	VARCHAR 2(1)			Valid values are Y (do not phone) or N (OK to phone).	
DO_NOT_FAX_FLAG	VARCHAR 2(1)			Valid values are Y (do not fax or N (OK to fax).	
DO_NOT_EMAIL_FLAG	VARCHAR 2(1)			Valid values are Y (do not email) or N (OK to email).	
ORIG_SYSTEM_ REFERENCE	VARCHAR 2(240)				May be populated as <orig_ system_code >:: <identifier> example: OTN:10100.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LEAD_RANK_ID	NUMBER(15)			as_sales_lead_rank_vl.rank_id, meaning where enabled_flag = 'Y'	Need not supply if supplied will get validated.
NEW_PARTY_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_LOC_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_PS_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_REL_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_CON_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
ORIG_SYSTEM_CODE	VARCHAR2(30)				Source application code where the lead originated example: OTN

If you are importing leads and have flexfield set up in your application you must also populate the AS_IMP_SL_FLEX table

Table Column	Comment
IMP_SL_FLEX_ID	
IMPORT_INTERFACE_ID	
CREATED_BY	
CREATION_DATE	
LAST_UPDATED_BY	
LAST_UPDATE_LOGIN	
LAST_UPDATE_DATE	

Table Column	Comment
ENTITY_NAME	Entity Names that are supported are HZ_ PARTIES, HZ_ LOCATIONS, HZ_ CONTACT_POINTS, HZ_PARTY_SITES, HZ_ ORG_CONTACTS, HZ_ ORG_CONTACT_ ROLES, AS_SALES_ LEADS. Lookup Type ENTITY_ NAME
VALIDATED_FLAG	
TARGET_OBJ_ID	
SECURITY_GROUP_ID	
REQUEST_ID	
PROGRAM_ APPLICATION_ID	
PROGRAM_ID	
PROGRAM_UPDATE_ DATE	
ATTR_VAL_CATEGORY	
ATTR_VAL_1	
ATTR_VAL_2	
ATTR_VAL_3	
ATTR_VAL_4	
ATTR_VAL_5	
ATTR_VAL_6	
ATTR_VAL_7	
ATTR_VAL_8	
ATTR_VAL_9	
ATTR_VAL_10	
ATTR_VAL_11	

Table Column	Comment
ATTR_VAL_12	
ATTR_VAL_13	
ATTR_VAL_14	
ATTR_VAL_15	
ATTR_VAL_16	
ATTR_VAL_17	
ATTR_VAL_18	
ATTR_VAL_19	
ATTR_VAL_20	
ATTR_VAL_21	
ATTR_VAL_22	
ATTR_VAL_23	
ATTR_VAL_24	
GATTR_VAL_ CATEGORY	
GATTR_VAL_1	
GATTR_VAL_2	
GATTR_VAL_4	
GATTR_VAL_3	
GATTR_VAL_5	
GATTR_VAL_6	
GATTR_VAL_7	
GATTR_VAL_8	
GATTR_VAL_9	
GATTR_VAL_10	
GATTR_VAL_11	
GATTR_VAL_12	
GATTR_VAL_13	

Table Column	Comment
GATTR_VAL_14	
GATTR_VAL_15	
GATTR_VAL_16	
GATTR_VAL_17	
GATTR_VAL_18	
GATTR_VAL_19	
GATTR_VAL_20	

25c): Checking for and Correcting Errors in Imported Leads

Use this procedure to check for and correct any errors detected by the Lead Import concurrent program during lead import. The errors are stored in the AS_LEAD_IMPORT_ERRORS table.

Prerequisite

You must:

- Import the leads from a flat file or populate the interface table.
- Run the Lead Import concurrent program.

Steps

1. If you wish to view a report which details how many leads were successfully imported, then:
   a. Under the TeleSales Manager responsibility, navigate to **Reports > Lead Import Report**.
   b. Enter report parameters and click **OK**.
2. Under the TeleSales Administration responsibility, navigate to Lead Import.

   The Data Load Maintenance window appears.
3. Find the records with errors using the Query Enter / Query Run search method:
   a. From the View menu choose **Query by example >Enter**.
   b. From the Load Status drop-down list, select Error.
   c. From the View menu choose **Query by example >Run**

If there are any records with an error, then the window displays the first record. The status bar at the bottom of the window tells you how many records have errors in all.

4. Navigate to the record you wish to correct.
5. From the drop-down list in the middle of the window, select Error to view any error messages. This error page also tells you when the date and time the error was detected.
6. If you wish to correct an error in customer data, then:
    a. Select Accounts from the drop-down list in the middle of the window.
    b. Make your corrections.
    c. Click **Save** on the toolbar.
7. If you wish to correct an error in purchase interest or budget information, then:
    a. Select Leads from the drop-down list in the middle of the window.
    b. Make your corrections.
    c. Click **Save** on the toolbar.
8. Change the Load Status for the record to New.

    Note: You must change the load status of a corrected record to NEW for the lead import program to load the lead again.

9. Click **Save** on the toolbar.
10. Repeat this procedure for each record with an error.
11. Click **Load** when you have completed correcting all of the records.
12. Click **Yes** in the Decision dialog box. This runs the Lead Import concurrent program again.
13. After the concurrent program has completed successfully, check to see if there are any remaining errors by running another Query Enter / Query Run query on Load Status of Error.

Note: The application does not remove the records of past errors. This means that if a record still has an error when you run the lead import the second time, the same record will show up twice as an error. You can tell the most recent version by examining the date and time on the error page.

About Existence Checking

Before creating a new customer, the lead import program checks to see if a duplicate customer name already exists in the database. If a duplicate exists, then the program does not create a new customer record. Instead, it creates a lead for the existing customer.

If multiple records exist with same name, then the program creates the lead for the customer with the highest party_id. Similar checks are done for addresses and contacts.

How the Program Checks for Duplicates

The TCA APIs use the word replacement rules to create fuzzy keys. The lead import program then uses these fuzzy keys to check for duplicate data. The program creates new records according to the following algorithm:

1. If the location does not exist, then create the location.
2. If the party does not exists, then create the party.
3. If the party site does not exist for the combination of party and location, then create the party site.
4. If the contact party does not exist, then create the contact party.
5. If the relationship of type CONTACT not exist between party and contact party, then create the organizational contact, relationship, and contact roles.

Customer

Existence checking is done using customer_key in HZ_PARTIES. This key is generated by TCA APIs while creating the customer.

The Lead Import program populates the AS_IMPORT_INTERFACE table with customer keys using TCA APIs for all leads to be imported. Then it compares the customer key of the lead to be imported with customer keys in HZ_PARTIES. If it finds a match in HZ_PARTIES, then it uses the matching customer. Otherwise it creates a new customer using the TCA API. If there are multiple records with same customer key, then the lead is created for the customer with the highest party_id.

Any word replacement rules defined in TCA are applied to the customer name in the lead import interface table while populating the key in lead import interface table.

Address

In the TCA customer model, the address consists of the Party Site in HZ_PARTY_SITES and location in HZ_LOCATIONS. Locations is a physical address, such as 500 Oracle Parkway, Redwood Shores, CA 94065. The Party Site is a logical name associated with a location. For example, the Party Site "Headquarters" can be associated with the location 500 Oracle Parkway. Multiple party sites can point to same location. For example, 500 Oracle Parkway can be both "Headquarters" and "Human Resources". The lead import program checks if a duplicate location exists in HZ_LOCATIONS and if the Party Site exists for the combination of location and customer in HZ_PARTY_SITES.

The existence checking is done using address_key in HZ_LOCATIONS. This key is generated by the TCA APIs while creating the location. The Lead Import program populates the AS_IMPORT_INTERFACE table with address keys using TCA APIs for all leads to be imported. It then compares the address key of the lead to be imported with address keys in HZ_LOCATIONS.

If a matching record is found in HZ_LOCATIONS, then it uses the matching location. Otherwise it creates a new location using the TCA API. If there are multiple records with same address key, then the lead is created for the location with the highest location_id.

Once the location_id is created, the program finds out whether a party site exists for the combination of this location_id and party_id. If such party site already exists, then the lead is created for that party_site_id. If not, then a new party site is created using TCA API.

Contact

In TCA, the contact is stored as a party of type "PERSON" in HZ_PARTIES and a relationship is created between the customer and contact in HZ_PARTY_RELATIONSHIPS. The lead import program checks whether the contact exists in HZ_PARTIES (as a party of type "PERSON") and it checks whether a relationship of type "Contact" exists between the customer and contact in HZ_PARTY_RELATIONSHIPS. The existence checking is done using customer_key in TCA table (HZ_PARTIES). For more details, please refer to the above section on customers.

If a relationship of any other type exists, then Lead import program will create a new relationship.

If a contact with same first name and last name (the same party_name) exists in HZ_PARTIES, then the lead import program does not create a new contact in the TCA tables. It instead creates a new relationship and attaches the lead to that contact.

Contact Restrictions

The Lead Import program sets the do_not_phone_flag, do_not_fax_flag, do_not_email_flag, and do_not_mail_flag for the contact (relationship party_id). It also sets the do_not_mail_flag for the address (party_site).

No existence checking is done.

Contact Points

Lead Import creates Phone, Email, WEB, and Fax. No existence checking is done.

Limitations

The Lead import program cannot identify duplicate records within a batch. This means that if the lead import table is populated with two leads for the same customer and that customer does not exist already, then lead import will create two new customers.

Existence checking for contacts is based only on the name of the contact. This means that if John Dow already exist as a person, then lead import will not create a new party 'John Dow' of type "PERSON". It will create new relationship records for each customer named 'John Dow'.

You can not bypass Existence checking.

Step 26: Setting Up Sales Online Wireless (Optional)

Follow these steps to set up Sales Online Wireless:

Set Up Sales Online Wireless Application

- Set the profile JTFW_PROFILE_DEFAULT_WIRELESS_RESPONSIBILITY equal to 22726.

The number 22726 is the responsibility id of "Sales Online Wireless User". Make sure you have the responsibility already seeded.

Set Up Wireless Edition Server

1. Install 9iAS Wireless Edition Server.

   For detailed information about installing the 9iAS Wireless Edition Server, refer to the Oracle 9i Application Server Documentation, Release 1 (v1.0.2.2).

2. Create a service that points to jtfwlgnm.jsp file which is the application HTML top.

   http://your.middletier.com:PORT/OA_HTML/jtfwlgnm.jsp