Oracle® Sales Online

Concepts and Procedures

Release 11*i*

June 2001

Part No. A88763-03

Oracle Sales Online Concepts and Procedures, Release 11*i*

Part No. A88763-03

Contents

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Preface

This Concepts and Procedures Guide provides information and instructions to help you work effectively with 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 is aimed at the following users:

- Sales Online Administrators
- Sales Online Sales Representatives
- Sales Online Sales Managers
- Sales Executives

Structure

This manual contains the following chapters:

"Understanding Oracle Sales Online" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"Using Oracle Sales Online" provides process oriented, task based procedures for using the application to perform essential business tasks.

Related Documentation and Resources

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

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

Supplemental CRM Installation Steps

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 Online Concepts and Procedures

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

Oracle Marketing Online Encyclopedia Concepts and Procedures

This document is a printed compilation of the Oracle Marketing Online Encyclopedia 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.

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Understanding Oracle Sales Online

This topic group provides an overview of the application and its components, explanations of key concepts, features, and functions, as well as the relationship of the application to other Oracle or third-party applications.

This section will help you understand Oracle Sales Online more completely through the complete business flow diagram, Concept to Cash.

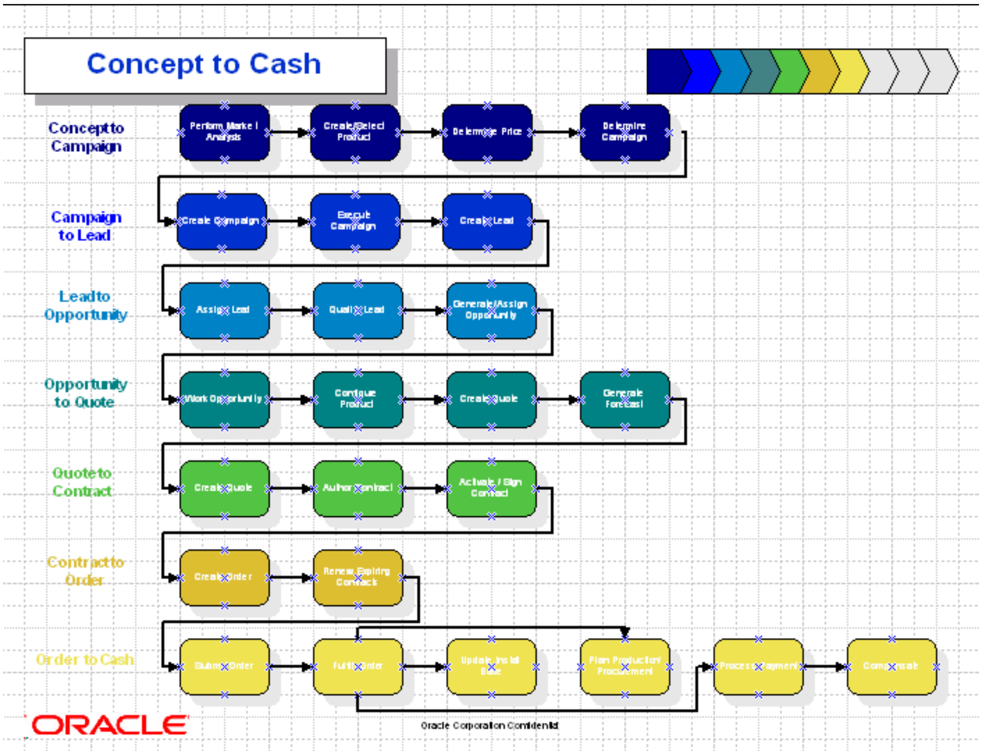
- Understanding Concept to Cash

Sales Online is organized by the following tabs:

- Home
- Activity
- Opportunity
- Quote
- Forecast
- Customer
- Partner
- Compensation
- Fulfillment
- Encyclopedia
- Administration

Understanding Concept to Cash

The following diagram outlines the Concept to Cash complete business flow (CBF)



Overview of Functionality

Sales Online includes the following functionality:

- Customer and Contact Management
- Trading Community Architecture customer model
- Opportunity Management
- Opportunity and Product Category Forecasting
- Notes, Tasks, and Attachments Management
- Interactions Management

- Quote Management
- Partner Management
- Incentive Compensation
- Collateral Fulfillment
- Marketing Encyclopedia System

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.
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.

Navigating Sales Online

The following table describes several navigation items and how they work:

Navigation Tips

Item	How it works
Tab	Tabs are the major navigation tool you can use to quickly go to another area of functionality. Clicking a tab takes you to the tab's subtabs.
Subtab	Subtabs are used to navigate to another level of functionality under a main tab.
Link or Hyperlink	Links or hyperlinks are used throughout the application to take you to details, additional functionality, and lists of values.
Asterisks	Fields marked with an asterisk are mandatory to perform that particular function.
Star	New items on a summary table are marked with a star.
Lock icon	If you see a Lock icon next to an item in a summary table, it means that you do not have access to change or update the information for that item.
Quick Find	Select an item and enter a full or partial search string, using % as a wildcard. Click **Go**.
Advanced Search	Click the Advanced Search link and enter search filters, display options, and sort options. You can name the search and save it.

You can perform some or all Sales Online functions from each of the following tabs, depending on the responsibility assigned to you by the Sales Online system administrator or your manager.

For a complete list of the functions available for each tab, click a link below:

- **Home**
- **Activity**
- **Opportunity**
- **Quote**
- **Forecast**
- **Customer**

- **Partner**
- **Compensation**
- **Fulfillment**
- **Encyclopedia**
- **Administration**

Using Oracle Sales Online

This topic group provides process-oriented, task-based procedures for using Sales Online to perform essential business tasks.

- Getting Started

Getting Started

When you log in to Sales Online for the first time, the home page profiles and preferences have not yet been set. You can decide what items you want to display on the summary pages of each Sales Online tab.

- Setting User Profiles and Preferences (set personalization options and preferences)
- Account Settings (change your password)
- Personalization (set personal preferences)
- Sales Online Preferences (set Sales Online preferences)

Setting User Profiles and Preferences

Use the Profile page to change your password, set personalization options, and set Sales Online preferences.

Navigate to the Profile page by clicking the **Profile** icon at the top right of the application page. By default, the page opens to the Personal Profile page. Use the Personal Profile subtab under Account Settings to change your password.

Changing Your Password

From the Personal Profile subtab, enter a new password in the Password field. Enter it again in the Re-enter Password field. Click **Update**.

Note: You cannot update your user name.

You can also set the following from the Profile page:

- Personalization
- Sales Online Preferences

Personalization

General personal preferences are determined by the default values set by the system administrator, and can be changed by the user.

To set or change your preferences, click the **Preferences** subtab located at the left side of the Profile page. Please remember, you must click **Update** after changing information in each page. The following preferences can be set or changed from this subtab:

- Current Responsibility
- Default Responsibility
- Display Style
- Language
- User Currency
- Date Format
- Table Display (rows per page and blank rows per table)

Current Responsibility

The responsibility level under which you have logged in. To perform other functions with a different responsibility, change the value.

Default Responsibility

Designates the default responsibility each time that you log into the system.

Display Style

Choose the display style that you would like to use. Display style changes the look of the application, such as color. Please note, if only one display style exists, you will not be able to choose another.

Language

To change the language in which the labels on the user interface are displayed, choose from the selections in the drop down list in the Language field.

User Currency

Select the desired user currency by choosing from the drop down list in the User Currency field. If the user currency is different than the opportunity currency, both amounts will be displayed on the Opportunity Summary page using daily conversion rates.

Date Format

To change the format for displaying dates, choose from the drop down list in the Date Format field.

Table Display

You can change how many rows you want tables to display, for instance, in the Opportunity Summary page, by using the drop down list in the Rows per page field to select a different number.

If there are more records than you have chosen to display, you will see a **Next** link at the bottom of the table.

You can also choose the number of blank rows used for entering data per table to display by selecting a different number from the drop down list in the Blank Rows per table field.

Setting Sales Online Preferences

Steps

To set or change Sales Online preferences, choose the **Profile** icon in the upper right of the application page to navigate to the Profile page. Click a **Sales Online Preference** link to set the following preferences:

- General Preferences
- Home Page Preferences
- Activity Preferences
- Opportunity Preferences
- Forecasting Preferences
- Customer Preferences
- Compensation Preferences

Setting General Preferences

Use the General Preferences page to set your defaults for fields that are applicable to more than one tab.

Steps

To set or change General preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences region, click the General link.

Default Country: From the drop down list, choose the default country that will be used throughout the application.

Default Role: From the drop down list, choose which role you want as your default. If you have more than one role, this role will appear as the default.

Default Note Type: Select the note type that you want as your default throughout the application from the drop down list.

Display Notes for Last 'N' Days: Enter the number of past days for which you want to display notes.

Display Creation and Modified Tracking: Select the check box to display a footnote on the bottom of each updateable page that shows the creation date, last change date, and user id.

Enable Record Counting: Select the check box to show the number of records in a table, e.g., 1-31 of 100.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

Setting Home Page Preferences

Until you have set your preferences, you will see an introductory message about setting preferences on the home page.

Your home page preferences are categorized into four sections, Bin Preferences, News Preferences, and Report Preferences.

Steps

To set or change Home Page preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences region, click the Homepage link.

Bin Preferences: To decide the order that the bins will display on your home page, choose a number for each bin that you want to use on the page. Additionally, from the drop down lists, you can set the number of rows for each bin and the frequency for which you want to see them.

Under Bin Preferences, you can configure up to four bins on your home page; the choices include New Leads (populated via Oracle TeleSales), Won Opportunities, Open Opportunities, Activity, and My Forecasts.

Please note, the forecast bin displays the last 'n' forecasts for the user; it does not matter which group or which role the user is assigned.

Please note, since an opportunity may contain more than one product category, you may see a difference in the number of opportunities as compared to the number of product categories when you are viewing an opportunity bin.

News Preferences: To set up the News preferences, enter the stock symbol of the company you want to get news headlines for and enter the number of headlines you want to see. Please note, viewing headlines requires for the functionality to be set up and news is provided by a third party.

Report Preferences: To display reports on your home page, choose from the Report Name drop down list.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

Setting Activity Preferences

You can set the following preferences from Activity Preferences:

Steps

To set or change Activity preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences region, click the Activity link.

Default Type: Choose the default task type from the drop down list.

Default Status: Choose the default status from the drop down list.

Default Priority: Choose the default priority from the drop down list.

Display Tasks for Last 'N' Days: Enter a number to indicate the number of past days for which you would like to display tasks as the default for the Organization, Person, and Opportunity tasks only. Activity tab tasks are based on the saved, or default, query.

Calendar Preferences: Under the Calendar Preferences section, you can set your preference for **Week Begins on**...**and Ends on**...and**Day Starts at**...**and Ends at**...by selecting from the drop down list options.

Personalized Searches: Remove any saved search by clicking the remove check box. To display a saved search as your summary page default, select the radio button.

Click **Update** to save changes.

Note: The seeded search, "My Tasks", cannot be removed because it is the system wide default.

Back to Setting Sales Online Preferences

Setting Opportunity Preferences

From the Opportunity Preferences page, you can set your defaults for the following:

Steps

To set or change Opportunity preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences section, click the Opportunity link.

Default Sales Stage: Choose from the drop down list.

Default Win Probability: Choose from the drop down list.

Default Status: Choose from the drop down list.

Default Close Date to 'N' Days Ahead: Enter the default number of days that you want to default close dates beyond the opportunity creation date.

Default Channel To: Choose either direct or indirect from the drop down list.

Default Sales Methodology: The default is "Object Oriented".

Personalized Searches: Remove any saved search by clicking the Remove check box. You can also display a saved search as your summary page default by selecting the Use as Summary Page Default check box.

Personalized Reports: Remove any saved reports by clicking the Remove check box. You can also display a saved report on your home page by selecting the Use as Home Page Default check box.

Note: The seeded search, "My Opportunities", cannot be removed because it is the system wide default.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

Setting Forecasting Preferences

From the Forecasting Preference page, you can set your preferences for the following:

Steps

To set or change Forecasting preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences section, click the Forecasting link.

Default Forecast Period Type: Select from the drop down list.

Default Forecast Currency: Select from the drop down list.

Default New Rows in Worksheet to: You have two options to select from within this drop down list; **Zero** or **Pipeline**. If you select zero, the worst case, best case, and forecast fields will default to zero. If you select pipeline, the worst case field will display won date values, the forecast field will display the weighted pipeline values, and the best case field will display pipeline amount.

Autosubmit Worksheet: Select Opportunity, Product Category, Both, or None to auto submit your worksheets from the forecasting tab.

Display Subordinate Current Pipeline Values: You can display Subordinate Current Pipeline Values by selecting the check box. This will display a total of your subordinates current pipeline values.

Display Grand Totals: To display Grand Totals, select the check box. Your opportunity and product category worksheets will show a grand total.

Use the Aggregation table to Get the Pipeline on the Forecast Main Page: Select the check box to use the aggregation table to get the current pipeline on the forecast main page.

Please note, this can only be used by salespeople who manage sales groups and choosing this option means that you will not be using real time data. Rather, the aggregated data is refreshed on a pre-determined schedule, set in the forecast profile options, based on business requirements. You will see a message indicating when the aggregation tables were last refreshed.

Personalized Reports: Remove a personalized report by selecting the Remove check box.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

Setting Customer Preferences

From the Customer Preferences page, you can set your default values for the Organization and Person subtabs.

Steps

To set or change Customer preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences section, click the Customer link.

Default Organization Phone Type: Select from the drop down list.

Default Person Phone Type: Choose from the drop down list.

Default Customer Category: Choose from the drop down list.

Default Address Type: Select from the drop down list.

Number of Address Lines: Choose from the drop down list.

Default Organizational Relationship: Choose from the drop down list.

Default Person Relationship: Choose from the drop down list.

Display Interactions for last...Days: Enter a value in the field.

Personalized Organizational Searches: Remove any saved searches by clicking the Remove icon. To display a saved search as the default on your summary page, select the radio button.

Personalized Person Searches: Remove any saved searches by clicking the Remove icon. To display a saved search as the default on your summary page, select the radio button.

Note: The seeded searches, "My Organizations", "My People", and "My Person Relationships", cannot be removed because they are system wide defaults.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

Setting Compensation Preferences

From the Compensation Preferences page, you can set your default values for the Compensation tab.

Steps

To set or change Compensation preferences, choose the **Profile** icon at the top right of the application page to navigate to the Profile page. Under the Sales Online Preferences section, click the Compensation link.

Default Period: From the Compensation Preferences page, set your Default Period by selecting from the drop down list.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

Your Home Page

From the Home Page you can display bins, based on your Home Page Preferences. The Home Page includes the Home and News subtab. You can view the details of your bins by clicking the links in each bin. Additionally, you can view seeded reports by clicking the report link.

The following are brief descriptions of each subtab:

- **Home**-You can view bin reports from your home page by indicating your preference. Follow these steps to indicate your preferences:

  1. Click the Profiles icon.
  2. Click Homepage.

  Bins provide hyperlinks to summary level reports.

  Please note, the forecast bin displays the last ’n’ forecasts for the user; it does not matter which group or which role the user is assigned.

- **News**-Display external news information from the Marketing Encyclopedia System on your home page. Follow these steps to indicate your preferences:

  1. Click the Profiles icon.
  2. Click Homepage.

Activity Tab

You can use the Activity tab to manage your tasks. The summary task view, "My Tasks", shows all the tasks that are assigned to you.

Note: Depending on your implementation of Sales Online, it is possible that you will see the Calendar subtab from the Activity tab. Please be aware that this is an alpha version of this feature, it 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. Using a menu exclusion, you can exclude the Calendar subtab from the Activity tab. For details about menu exclusion, please refer to the *Implementing Oracle CRM Foundation* guide.

You can perform the following functions from the Activity tab:

- Personalize task summary
- Create a task
- Add an attachment to a task
- Maintain task details
- Search tasks

Personalizing Task Summary

You can personalize your task list summary page with the Personalize button.

Steps

Follow these steps to define your personal list of tasks:

1. Click **Personalize**.
2. Change, add, or remove parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search**.

   Saved Searches appear in a drop down list on the Activity page.

Note: The Advanced Search link and Personalize button take you to the Task Search page.

Creating a Task

Follow these steps to create a task:

Steps

1. Click the **Activity** tab.
2. Click **Create**.

   The Create Task page opens.

The following table describes the Task Detail fields.

Task Detail Fields

Field	Required Field	Description
Task Type	Yes	Select the task type from the drop down list.
Private	No	Select the check box if you want the task to be viewable only by the creator of the task.
Task Name	Yes	Enter the task name.
Task Description	No	Enter a description.
Priority	No	Select priority from the drop down list.
Status	No	Select the task status from the drop down list.
Date	Yes	Select a date by clicking the calendar and choosing a date.
Start Time	No	Select a time from the drop down lists. Start and end time for a task must be on the same day.
End Time	No	Select an end time for the task from the drop down list. Start and end time for a task must be on the same day.
Owner	Yes	Enter the full or partial name, using % as a wildcard, and click **Go**. Select from the search results.

Field	Required Field	Description
Relate To	No	Select the related item (opportunity, organization, person, quote, or relationship) from the drop down list. Enter the full or partial item name and click Go.

3. Click **Create**.

Adding an Attachment to a Task

You can add Text, a File, or a URL (Universal Resource Locator) attachment to a task.

Prerequisite

A task must exist. To create a task, click here.

Steps

Follow these steps to add an attachment to a task:

1. From the Activity tab, locate the task for which you want to add the attachment.

   To search using **Quick Find**:

   1. Choose Task from the drop down list.
   2. Enter the full or partial task name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Task Search page opens.

   2. Enter desired Task Information and Display Options, and click **Search**.

      The Task Search Results page opens.

2. Select the task by clicking the task link.

   Alternatively, click the Modify Search button change your search filters and display options.

3. Click the Attachments link.

4. Click **Add**.

   The Add Attachment page opens.

5. Enter a description and select one of the following; **Text**, **File**, or **URL**.

   - Enter text
   - Click **Browse** to search for a file
   - Enter the URL

6. Click **Create**.

Maintaining Task Details

Once you have created a task, use the following steps to edit task details.

Prerequisite

A task must exist. To create a task, click here.

Steps

Follow these steps to maintain task details:

1. From the **Activity** tab, navigate to the task that you want to edit.

   To edit task details from the summary page, edit details directly on the summary page and click **Update**.

   To search using **Quick Find**:

   1. Choose Task from the drop down list.
   2. Enter the full or partial task name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Task Search page opens.

   2. Enter desired Task Information and Display Options, and click **Search**.

      You will see the Task Search Results page.

2. Select the task by clicking the task link.

3. Alternatively, click the **Modify Search** button change your search filters and display options.

The following table describes the Task Detail fields.

Task Detail Fields

Field	Required Field	Description
Task Type	Yes	Select the task type from the drop down list.
Private	No	Select the check box if you want the task to be viewable only by the creator of the task.
Task Name	Yes	Enter the task name.
Task Description	No	Enter a description.
Priority	No	Select priority from the drop down list.
Status	No	Select the task status from the drop down list.
Date	Yes	Select a date by clicking the calendar and choosing a date.
Start Time	No	Select a time from the drop down lists. Start and end time for a task must be on the same day.
End Time	No	Select an end time for the task from the drop down list. Start and end time for a task must be on the same day.
Owner	Yes	Enter the full or partial name, using % as a wildcard, and click **Go**. Select from the search results.
Relate To	No	Select the related item (opportunity, organization, person, quote, or relationship) from the drop down list. Enter the full or partial item name and click Go.

4. Click **Update**.

Searching for a Task

Follow these steps to search for a task:

Prerequisites

A task must exist. To create a task, click here.

Steps

1. From the **Activity** tab, select Quick Find or Advanced Search.

   To search using **Quick Find**:

   1. Choose Task from the drop down list.
   2. Enter the full or partial task name using % as a wildcard.

      Please note, to enter a search string, enter quotation marks around the search phrase you want to find. For example, to search for to do tasks, enter "to do".

   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Task Search page opens.

   2. Enter desired Task Information and Display Options.
   3. Click **Search**.
   4. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.

      You will see the Task Search Results page.

2. Select the task by clicking the task link.

   Alternatively, click the Modify Search button change your search filters and display options.

Opportunity Tab

The first step in the Oracle Sales Online sales process is a sales opportunity, also referred to as a potential sale. This process begins with the initial customer contact and ends when the sales representative makes or loses a sale.

Once potential opportunities within a company have been identified, sales representatives can perform the following tasks:

- Identify how the opportunity came about

- Enter information on items to be purchased
- Track the likelihood of closing the sale
- Allocate sales credit for forecasting

Sales representatives can manage existing opportunities, assigned to them manually or automatically through Territory Assignment, or they can enter new opportunities. By default, the sales representative who created the opportunity has full access to the opportunity. Full access to the opportunity means that the sales representative who created the opportunity can add sales team members, assign sales credits, and estimate the likelihood that an opportunity will succeed. Additionally, sales representatives and their managers use this opportunity information to forecast sales under the Forecast tab.

The following tasks can be performed from the Opportunity tab:

- Personalize opportunity summary
- Create, maintain, search, and copy opportunities
- Create a quote from an opportunity
- Create and maintain sales credits
- Create and maintain contacts
- Create and maintain notes
- Create and maintain sales teams
- Create and maintain tasks
- Create and maintain classifications
- Create and maintain competitors
- Create and maintain attachments

Personalizing Opportunity Summary

You may want to personalize your opportunity lists, for example, "My Opportunities Closing This Week" or "My Opportunities in Stage 3". These lists can be used as a summary page default so that they appear every time you click the Opportunity tab. The default list is "My Open Opportunities".

Follow these steps to personalize opportunities:

Steps

1. From the **Opportunity** tab, click **Personalize**.
2. Change, add, or remove parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as a Summary Page Default check box.
7. Click **Save** to save the list, or **Save and Apply Search** to both save and apply the search.

   Saved Searches appear in a drop down list on the Opportunity page.

Note: The Advanced Search link and Personalize button take you to the same Opportunity Search page.

Creating an Opportunity

Follow these steps to create a new opportunity:

Prerequisites

A search for the opportunity should have been performed to ensure that a duplicate opportunity is not created.

Steps

1. From the **Opportunity** tab, make sure you are on the **Opportunity** subtab.
2. Click **Create**.

   The Create Opportunity page opens.

3. Use the Select a Customer field and enter the full or partial name of the organization or person that you want to find. By default the system will search for organizations.
4. If the customer is located in a country outside of your country, select that country from the drop down list, click **Go**. This field is used as a search filter; it is not stored against the opportunity and it is not returned from the list of values.

   The Select a Customer page opens with the search results.

5. If you are searching for a person, instead of an organization, select the Person radio button and click **Go**.
6. Select a customer by clicking the customer link or click **Cancel** to return to the previous page.
7. If you do not find the customer that you are looking for, click **Create Customer**.
    1. At a minimum, enter the required information; organization name or person first and las name, address line 1, and country.
    2. Click **Create**.

    The Create Opportunity page opens. If selected, the customer name and address are populated into the Create Opportunity page.

    The following table describes the Create Opportunity fields. If you have selected a customer through a Search, the customer information will populate the required fields automatically.

Create Opportunity Detail Fields

Field	Required Field	Description
Customer	Yes	Is defaulted from customer that is created or chosen through a search.
Customer Address		Required if profile option OS: Address Required is set.
Opportunity Name	Yes	Enter an opportunity name.
Select a Project	No	To select a project, select the radio button, enter the project name and click Go.
Create a Project	No	To create a project, select the radio button and enter the new project name.
Status	Yes	Select from the drop down list.
Sales Stage	Yes	Select from the drop down list.
Win Probability	Yes	Select from the drop down list.
Close Date	No	Click the Calendar icon to select a close date. Close date is defaulted based on profile option OS: Default Close Date Days
Currency	Yes	Select from the drop down list.

Field	Required Field	Description
Channel	Yes	Select from the drop down list.
Budget	No	Enter budget information.
Methodology	No	Select from the drop down list.
Close Reason	No	Select from the drop down list. Close reason is required if the status is a close status.
Campaign	No	Enter a campaign name, click Go.

8. Optionally, enter purchase items by selecting from the following fields:
   - Product Category
   - Inventory Item: You can search for inventory items by selecting a product category, entering a partial inventory item name and clicking **Go**. Choose from the list of inventory items.

     The list of Inventory Items is limited to the items that are mapped to the product category that you select. If product category is blank, you will see a full list of inventory items. When you choose an item, product category will be populated.
   - Enter a Quantity
   - Enter the Amount
   - Add a Forecast Date by clicking the Calendar icon and choosing a date. This date will be used to forecast the opportunity. This allows you to create one opportunity and distribute the opportunity over multiple forecast periods.
   - The forecast date will be defaulted from the opportunity decision date if you select the Use Close date check box.
9. To enter Contacts, enter the last name in the Add a Person field and click **Go**.

   To create a new person, the required fields are First Name, Last Name, and Relationship. Optionally, you may enter a phone number, email address, and opportunity role.

   Note: When adding or creating a contact for this opportunity, you are also creating a relationship between this person and the customer for whom you are creating the opportunity.
10. To create a note, choose the Type from the drop down list.

Select the Private check box, if you want to keep the note private. Enter the text in the Text box.

11. Click **Create**.

    You have created the opportunity when the Opportunity Detail page opens. You can change data, enter additional information, or go to the customer detail by clicking the customer name link.

Maintaining Opportunity Detail

Steps

Follow these steps to maintain opportunity details:

1. You can access existing opportunities one of the following ways:

   By clicking the opportunity's name link from the summary page, or:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial opportunity name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.

   2. Enter desired Task Information and Display Options.
   3. Optionally, enter a Search Name, if you want to save the search.
   4. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.

      The Opportunity Search Results page opens.

2. Select the opportunity by clicking the opportunity link. Alternatively, click **Modify Search** change your search filters and display options.

Create Opportunity Detail Fields

Field	Required Field	Description
Customer	Yes	A read only field. Customer for the opportunity.
Customer Address		Address of customer.
Opportunity Name	Yes	Edit if necessary.
Project Name	No	Add a project name by entering the name and clicking Go.
Status	Yes	Select from the drop down list.
Sales Stage	Yes	Select from the drop down list.
Win Probability	Yes	Select from the drop down list.
Close Date	Yes	Click the Calendar icon to select a close date.
Currency	Yes	Select from the drop down list.
Freeze	No	The opportunity freeze flag facilitates the opportunity lock out feature for this specific opportunity. Once this check box is selected, no one on the sales team is allowed to update the opportunity. This Freeze check box overrides all access privileges. However, users whose "Update Frozen Opportunities" profile option is set to Y (Yes) can update frozen opportunities and deselect the Freeze check box. For more information about changing a profile option, refer to the *Oracle Sales Online Implementation Guide*.
Channel	Yes	Select from the drop down list.
Budget	No	Enter budget information.
Methodology	No	Select from the drop down list.
Close Reason	No	Select from the drop down list. Close reason is required if the opportunity status has a close status.
Campaign	No	Enter a campaign name, click Go.

3. Optionally, to enter Purchase Items, click the **Add Purchase Item** button.

   The Opportunity Add Purchase Item page opens.

4. Select the Product Category from the drop down list.
5. Optionally, select an Inventory Item by entering a partial name, use the "%" key as a wild card, and click **Go**.
6. Select the Quantity and Unit of Measure (UOM) from the list of values.
7. Enter the Amount, it is a required field.
8. Optionally, select a Campaign by entering a partial name, use the "%" key as a wild card, and click **Go**.
9. Enter the number of Purchase lines that you want to split your purchase line.
10. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.
11. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.
12. Click **Add** to create multiple purchase lines with forecast dates in above mentioned intervals.

You will see the new purchase lines on the opportunity detail page.

13. Click **Update**.

    Additionally, from the Opportunity Detail main page, you can access further details about the opportunity by clicking links to Contacts, Notes, Sales Team, Tasks, Classifications, Competitors, and Attachments, and Partners.

Searching for an Opportunity

Steps

Follow these steps to search for an opportunity:

1. From the **Opportunity** tab, select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Opportunity Search page opens.

2. Enter search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
4. Select the opportunity from the search results page by clicking the opportunity link.

Creating a Quote from an Opportunity

The profile OSO: Enable Quote needs to set to YES in order to view the Create Quote button on the Opportunity detail page. Please refer to the *Sales Online Implementation Guide,* Setting Up Opportunity and Forecasting section.

Steps

Follow these steps to create a quote from an opportunity:

1. From the **Opportunity** tab, select an opportunity using **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.

   2. Enter search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
   4. Select the opportunity from the search results page by clicking the opportunity link.

      The Opportunity Detail page opens.

2. Click **Create Quote**.

   The Quote detail page opens with the opportunity name as the quote name.

Copying an Opportunity

Prerequisites

An opportunity must exist. See Create an Opportunity.

Steps

If you want to copy an existing opportunity, follow these steps:

1. You can access existing opportunities one of the following ways:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
   4. Select an opportunity by clicking the opportunity link.

      The Opportunity Detail Main page opens.
2. From the Opportunity Detail main page, click **Copy**.

   The Copy Opportunity page opens.

   Copy Opportunity will create a new opportunity from this opportunity and will copy Purchase Items and Opportunity Contacts. You will see a Confirmation message that tells you that your changes have been applied.

Adding a Purchase Item (Opportunity)

Use this feature to duplicate an opportunity purchase item over multiple forecast dates. For example, if your Opportunity plans to buy ten desktop computers per month for the next six months, you can enter all the information on this page with each order appearing as a purchase line. These items can be included in forecasting.

Steps

1. From the **Opportunity** tab, make sure you are on the **Opportunity** subtab.
2. Select an Opportunity from the summary table or use the Quick Find feature to search for an opportunity.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.
3. Click **Add Purchase Items**.

   The Opportunity Add Purchase Item page opens.
4. Select the Product Category from the drop down list.
5. Optionally, select an Inventory Item by entering a partial name, use the "%" key as a wild card, and click **Go**.
6. Select the Quantity and Unit of Measure (UOM) from the list of values.
7. Enter the Amount, it is a required field.
8. Optionally, select a Campaign by entering a partial name, use the "%" key as a wild card, and click **Go**.
9. Enter the number of Purchase lines that you want to split your purchase line.
10. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.
11. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.
12. Click **Add** to create multiple purchase lines with forecast dates in above mentioned intervals.

You will see the new purchase lines on the opportunity detail page.

Sales Credits (Opportunity)

Use this feature to distribute sales credits to salespeople and partners. When you create an opportunity, 100% of each purchased item is allocated to the opportunity creator in Forecast Credits. The Sales Credits feature is comprised of Forecast Credits and Other Credits: Forecast Credits are used for forecasting and can be split between multiple salespeople but must total 100% of the purchase item line, and Other Credits do not have to equal 100% of purchase items line.

Please note, in order for a sales manager to receive sales credits, the sales manager must also have a role of sales representative. This can be achieved in the roles set up outlined in the *Oracle Sales Online Implementation Guide*.

You can perform the following functions regarding sales credits:

- Maintaining sales credits
- Adding a salesperson to receive sales credits
- Adding a partner to receive sales credits

Maintaining Sales Credits (Opportunity)

Prerequisites

None

Steps

Follow these steps to distribute sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name using % as a wildcard.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.

   2. Enter search filters and display options.
3. Click **Search**.

   The Opportunity Detail page opens.
4. From the Purchase Items table, under the Amount column, click **Split**.
5. Choose Add a Salesperson or "Add a Partner.
6. Enter the credit amount or percentage.
7. Click **Update**.

Adding a Salesperson to Receive Sales Credits (Opportunity)

Prerequisites

None

Steps

Follow these steps to add a salesperson to receive sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. From the Purchase Items table, under the Amount column, click **Split**.

5. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
6. Select an employee by clicking the employee name link.

   To search for an employee outside your business group, select the business group from the drop down list, click **Go**.
7. Enter credit amount (forecast or other).

Adding a Partner to Receive Sales Credits (Opportunity)

Prerequisites

None

Steps

Follow these steps to add a partner to receive sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.

   The Opportunity Detail page opens.
3. From the Purchase Items table, under the Amount column, click **Split**.
4. In the Add a Partner field, enter the name of the partner, and click **Go**.

5. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a "sales" partner.
6. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop down list and click **Update**.

The salespeople and partners to whom you have given sales credits will automatically be added to the sales team with non-full access.

Adding an Existing Contact to an Opportunity

Prerequisites

A contact must exist. See Creating a Contact.

Steps

Follow these steps to add an existing contact:

1. From the **Opportunity** tab, select an opportunity by clicking the link or search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
2. Select an opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click the Contacts link.
4. Enter the last name in the Add a Person field to search for a contact or person, click **Go**.

You can search by last name only. This will search for people which have already established a relationship with this customer called contacts.

5. From the Select a Person page, choose from the list of search results by clicking the relationship link.

If you cannot find the person you are looking for, you can widen your search to look for all people checking the "Search All People" radio button.

If you select a person that does not have an existing relationship with this customer, you can choose a relationship type.

Creating a New Contact (Opportunity)

Before creating a new contact, check to make sure that this person does not already exist in the database.

Prerequisites

None

Steps

Follow these steps to create a new contact:

1. From the **Opportunity** tab, select an opportunity by clicking the link or search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click **Search**.

2. Select an opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.

3. Click the Contacts link.

4. In the Contacts table, enter new information into the blank fields.

5. Click **Update** to save the information.

Note: Phonebook and Email Addressbook are associated with the relationship, not the person.

Notes (Opportunity)

In order to provide better support and service to your customers, you can enter comments into a free form text field that you can archive and share with others in your organization. The Notes tab represents a log of information that is stored about the opportunity.

- Create a note
- View a note

Creating a Note (Opportunity)

Prerequisites

None

Steps

Follow these steps to create a note:

1. From the **Opportunity** tab, choose an opportunity by:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

The Opportunity Search page opens.

2. Enter search filters and display options.
3. Enter Search Name, if you want to save the search.
4. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

The Opportunity Detail page opens.

2. Click the **Notes** link.
3. Select a Type from the drop down list.

   You can change the default type using Profiles.
4. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
5. Enter your notes in the Text box.
6. Click **Create**.

Note: You cannot edit notes once they are created.

Viewing a Note (Opportunity)

Prerequisites

A note must exist. See Creating a Note.

Steps

Follow these steps to view a note:

1. From the **Opportunity** tab, choose an opportunity by:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

The Opportunity Search page opens.

2. Enter search filters and display options.
3. Enter Search Name, if you want to save the search.
4. Click **Search**.

2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.

3. Click the **Notes** link.
4. Select a Type from the drop down list.

   The default type can be changed using Profiles.

5. Choose the number of days for which you want the notes history.
6. Click **Apply**.
7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
8. To view all notes in a printer-friendly format, click **All Notes**.

Note: Your profile set up determines the number of rows that will display in your notes table. If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

Sales Teams (Opportunity)

Sales teams represent all of the salespeople and partners that have ownership of an opportunity. Sales team members may have full access or non-full access (view only) ownership. When a salesperson creates an opportunity, he or she is automatically added to the sales team for that opportunity if the profile OS: Opportunity Access Privilege equals "Sales Team". See the *Oracle Sales Online Implementation Guide* for more information about setting profiles.

You can perform the following functions with regard to sales teams:

- Add a sales team member
- Add a resource team to a sales team
- Add a partner
- Remove a sales team member

Adding a Sales Team Member (Opportunity)

When adding a sales team member, if the profile "Address required" is set to "Yes" then Territory properties is a mandatory field. In this case the user must select the territory to which the sales person belongs before adding the sales team member.

If the "Address Required" profile is set to "No" then the territory properties is not a required field for adding a sales team member. Please refer to the *Sales Online Implementation Guide* for more detailed information about setting profiles.

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Opportunity** tab, choose an opportunity by:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click **Search**.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click the **Sales Team** link.
4. Enter the last name or partial name of the sales representative in the "Add a Salesperson" field, click **Go**.

5. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go.**
6. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
7. Optionally, enter the territory properties, and click **Go**.
8. Select a Role from the drop down list.
9. You can view the email address and phone number for this salesperson.
10. Click **Update**.

Adding a Resource Team to a Sales Team (Opportunity)

A resource team is a set of resources; sales people and partners. When you add a resource team, all the sales people and partners are also added.

Note: Valid roles must be assigned to the team, within Resource Manager, in order to find them using the resource team list of values. See the *Oracle Sales Online Implementation Guide* section on Resource Manager for more information.

Prerequisites

None

Steps

To add a resource team to a sales team, follow these steps:

1. From the Opportunity tab, select an opportunity by:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.

   3. Optionally enter a Search Name, if you want to save the search.
   4. Click **Search**.
2. Click the opportunity link to select it.

   The Opportunity Detail page opens.
3. Click the **Sales Team** link.
4. In the Add a Resource Team field, enter the resource team name and click **Go**.

   The Resource Team page with a list of salespeople and partners opens.
5. Select a resource team from the search results page by clicking the link.
6. Click **Update.**

Adding a Partner (Opportunity)

If you want to add a partner to the sales team:

Prerequisites

None

Steps

1. From the Opportunity tab, select an opportunity by:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Optionally enter a Search Name, if you want to save the search.
   4. Click **Search**.

2. Click the opportunity link to select it.

   The Opportunity Detail main page opens.

3. Click the **Sales Team** link.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

You can only choose from a list of partners whose organizations are specifically defined as a "sales" partner. Refer to the *Partner Relationship Management Concepts and Procedures* Guide for more detailed information.

Removing a Sales Team Member (Opportunity)

Follow these steps to remove a sales team member:

Prerequisites

None

Steps

1. From the **Opportunity** tab, choose an opportunity by:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.

   2. Enter search filters and display options.
   3. Click **Search**.

2. Click the opportunity link to select it.

   The Opportunity Detail page opens.

3. Click the **Sales Team** link.
4. Locate the salesperson on the summary table and select the Remove check box.
5. Click **Update**.

Note: You cannot remove a sales team member if the member has outstanding sales credits and the profile option OS: Opportunity Sales Credit Enforce Sales Team Definition is set.

Tasks (Opportunity)

Tasks provide a way of tracking current and future opportunity activities by providing a list of action items for a specific date range, as well as maintaining a history of activities. You can create tasks for yourself, assign tasks to others in your organization, and associate tasks with specific opportunities or people.

You can perform the following functions with regard to tasks:

- Create a task
- Add an attachment to a task
- Maintain a task

Creating a Task (Opportunity)

Follow these steps to create a task:

Prerequisites

None

Steps

1. From the **Opportunity** tab, choose an opportunity.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.

   2. Enter search filters and display options.

   3. Click **Search**.

2. Click the opportunity link to select it.

   The Opportunity Detail page opens.

3. Click the **Tasks** link.

4. Click **Create**.

5. Select Task Type from the drop down list.

6. If the task is a private task, select the "Private" check box. You can only assign this task to yourself.

7. Enter the Task Name.

8. Enter the Task Description.

9. Choose the Priority from the drop down list.

10. Select the Status from the drop down list.

11. Select a planned start date by clicking the Calendar icon and selecting a date.

12. Optionally, select a planned start time and end time by selecting from the drop down lists.

13. Enter the name of the person you are assigning to the task; click **Go**.

14. The "Relate to" field is defaulted to the opportunity with which you are working, however, you can edit this field.

15. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

Adding an Attachment to a Task (Opportunity)

Follow these steps to add an attachment to your task:

Prerequisites

A task must exist. See Creating a Task.

Steps

1. Click the **Attachments** link.
2. Click **Add**.

   The Add Attachment page opens.
3. Enter a description, and choose a **Text**, **File**, or **URL** attachment.
4. On your desktop, click **Browse** to search for a file to attach.
5. Click **Create**.

Maintaining a Task (Opportunity)

Follow these steps to maintain a task:

Prerequisites

A task must exist. See Creating a Task.

Steps

1. From the **Opportunity** tab, choose an opportunity.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
2. Click the opportunity link to select it.

   The Opportunity Detail page opens.
3. Click the Tasks link.
4. Add or update information.

5. Click **Update**.

Adding a Classification (Opportunity)

You can classify opportunities into categories that have been defined by your system administrator. Opportunity Classification is often used for territory assignment and reporting.

Follow these steps to add a classification:

Prerequisites

None

Steps

1. From the **Opportunity** tab, choose an opportunity.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
2. Click the opportunity link to select it.

   The Opportunity Detail page opens.
3. Select the **Classification** link.
4. Select a Classification from the drop down list that best describes your opportunity.
5. Optionally, enter comments.
6. Click **Update** to save.

   To remove a classification, click the remove icon, and click **Update**.

Adding an Existing Competitor (Opportunity)

You can add information about the competitors that you are facing with this opportunity. By definition, competitors are organizations that have a competitive relationship with an internal organization.

Follow these steps to add an existing competitor:

Prerequisites

None

Steps

1. From the **Opportunity** tab, choose an opportunity.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
2. Click the opportunity link to select it.

   The Opportunity Detail page opens.
3. Select the **Competitors** link.
4. Use Add a Competitor to search for a competitor, click **Go**.

   See the next section for steps about how to create a new competitor.
5. Select from the list.
6. Optionally, enter comments.
7. Click **Update** to save.

   To remove a competitor, click the Remove icon, and click **Update**.

Creating a New Competitor (Opportunity)

To create a new competitor, follow these steps:

Prerequisites

None

Steps

1. From the Customer tab, create an internal organization, if one does not already exist.

   Go to the Customers tab and create your company as an organization. Refer to the Create a New Organization section for step-by-step instructions. The required fields are Organization name and Address Line 1.

   Note: Remember to select the **Internal** radio button, on the Opportunity Detail page, to indicate that it is an internal organization.

2. Next, create the competitor as an organization.

   Go to the Customers tab and create an organization which will be the competitor.

3. Once you have created the internal organization and the competitor organization, create the relationship between the competitor and the internal organization by following these steps:

   1. Click the competitor organization's link to get to the details page.
   2. Click the Relationships link.
   3. In the Add an Organization field, enter the name or partial name of the organization for which you are creating the relationship and click Go.
   4. Select the organization from the Search Results page by clicking the link.
   5. From the Relationship drop down list, select "Competitor of".
   6. Click **Update**.

Attachments (Opportunity)

Attachments are defined as physical documents, URLs, or text. The typical use of attachments is for sharing and storing information about a person, organization, relationship, forecast, task, or opportunity. For example, you can attach written correspondence with a particular organization contact to that contact's record.

You can perform the following functions with regard to attachments:

- Add an Attachment
- View an Existing Attachment

Adding an Attachment (Opportunity)

Follow these steps to add an attachment:

Prerequisites

None

Steps

1. From the **Opportunity** tab, choose an opportunity.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
2. Click the opportunity link to select it.

   The Opportunity Detail page opens.
3. Click the **Attachments** link.
4. Click **Add**.

   The Add Attachment page opens.
5. Enter a description, and click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.

7. Click **Create**.

Viewing an Existing Attachment (Opportunity)

To view an existing attachment, click the attachment link.

Opportunity Reports

You can view the Opportunity Reports from the Organization tab, under the Reports subtab. For more detailed instructions, click a link below.

- View Opportunity Summary Report
- View Opportunity Summary Report by Group
- View Opportunity Detail Report
- View Opportunity Exchange Report
- View Opportunity Access Report

Viewing Opportunity Summary Report

This report provides a detailed list of the opportunities with amounts for each product category.

Follow these steps to view the Opportunity Summary report:

Prerequisites

None

Steps

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Summary Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

   To move all available columns into the display columns section click the >> button.

6. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio button to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.

Viewing Opportunity Summary Report by Group

This report provides a summary of all opportunities by the sales group.

Follow these steps to view the Opportunity Summary Report by Group:

Prerequisites

None

Steps

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Summary Report by Group** link.
4. Select the filter options to fit your needs.
5. Select the display options.
6. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio button to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.

Viewing Opportunity Detail Report

This report provides a detailed listing of the selected opportunities.

Follow these steps to view the Opportunity Detail report:

Prerequisites

None

Steps

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Detail Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

   To move all available columns into the display columns section click the >> button.
6. In the "Save Report As" section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio button to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.

Viewing Opportunity Exchange Report

Follow these steps to view the Opportunity Exchange report:

Prerequisites

None

Steps

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Exchange Report** link.
4. Enter the Opportunity Name.
5. Enter the Customer Name.

6. Select the Exchanged with Partner from the list of values.
7. Select the Exchanged Date Range From and To by clicking the calendar icon and choosing a date.
8. Select the Exchange Direction from the list of values.
9. Click **Go**.

Viewing Opportunity Access Report

This report provides a list of opportunities based on a manager and his or her subordinates.

Follow these steps to view the Opportunity Access report:

Prerequisites

None

Steps

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Access Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

   To move all available columns into the display columns section click the >> button.
6. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio button to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report at the same time, click **Save and Run Report**.
10. Select "Use as Report Default" check box to use the report as a default.

Viewing My Reports

My Reports list the reports you have saved using the Personalize functionality. When you enter specific filters, display options, sort options, you can save the report with a new name.

Quote Tab

The Quote tab contains a Quotes and a Reports subtab. Sections on creating quote notes and tasks are included in this guide. For information about creating, maintaining, searching quotes, and configuring quote line items, please refer to the *Oracle HTML Quoting Concepts and Procedures* guide.

From the Quotes subtab, you can do the following:

- Create a note
- Create a task

Create a Note (Quotes)

Prerequisites

You must have iStore, and iStore's dependencies, installed.

Steps

Follow these steps to create a note:

1. From the **Quote** tab, navigate to a Quote Detail page.
2. Click the Notes link.
3. Select a Note Type from the drop down list.

   You can change the default type using Profiles.
4. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
5. Enter your notes in the Text box.
6. Click **Create**.

Create a Task (Quotes)

Prerequisites

You must have iStore, and iStore's dependencies, installed.

Steps

Follow these steps to create a task:

1. From the **Quote** tab, navigate to a Quote Detail page.
2. Click the Tasks link.
3. Click **Create**.
4. Select Task Type from the drop down list.
5. If the task is a private task, select the "Private" check box.
6. Enter the Task Name.
7. Enter the Task Description.
8. Select the Priority from the drop down list.
9. Select the Status from the drop down list.
10. Select a planned start date by clicking the Calendar icon and selecting a date.
11. Optionally, select a planned start time and end time by selecting from the drop down lists.
12. Enter the name of the person you are assigning to the task; click **Go**.
13. The "Relate to" field is defaulted to the opportunity with which you are working, however, you can edit this field.
14. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

Forecast Tab

The following tasks can be performed from the Forecast tab:

- Create and submit forecasts
- View forecast history

- Automatically submit worksheets
- Create attachments
- Create forecast notes
- View opportunity worksheets
- View product category worksheets
- Create opportunity level forecasts using opportunity worksheet
- Create product level forecasts using product category worksheet
- View product category forecast history
- View opportunity forecast history
- Generate forecasts

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 plan to close by the end of the forecasting period.

The following table describes the two forecast levels.

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.
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.

Based on the role of the user, there are three viewing options; Salesperson View, Admin View, and Manager View. The following tables describe the Salesperson, Admin, and Manager Views.

Forecasting Views

View	How it works
Salesperson View (you are a salesperson and do not manage a group)	Weighted Pipeline = Opportunity Amount X Win Probability Pipeline = Total Forecastable Opportunity Amounts Won to Date = Sum of Opportunity Amount where the status equals won. Click the pipeline amount link to verify the opportunities included in your pipeline. This will show you a list of all forecastable opportunity lines with a forecast date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities. If you have submitted previous forecasts, the last submitted values will appear in the forecast values. The forecast main page will show your saved opportunity and product category worksheets (if any exist) as links. See the section on Creating Product Level Forecasts Using Product Category Worksheets and Creating Opportunity Level Forecasts Using Opportunity Worksheets for more information. Grand totals of last saved worksheet values appear along side the links if "Display Grand Total" profile is set. You can accept default values or update values the amounts you want to commit to, but you must submit your forecasts in order for your manager to be able to view them.
Admin View	If a sales rep is given admin responsibilities for a particular group then the user will have read-only access to the forecasts submitted by that group. The admin view is a read-only version of the main forecast page for that group manager. The Admin cannot update/create forecasts.

<table>
<tr><th>View</th><th>How it works</th></tr>
<tr><td>Manager View

(you manage one or more groups and the forecast you submit represents the group forecast)</td><td>Weighted Pipeline=Opportunity Amount X Win Probability

Pipeline=Total Forecastable Opportunity Amounts

Won to Date=Sum of OpportunityAmount where the status equals won.

The Manager View is the same as the Salesperson View with a subordinate section below. You can view group details by clicking the group link. Additionally, if you continue to drill down you will eventually reach the bottom of the sales hierarchy. You can view subordinate’s forecast details by clicking the subordinate’s name link.

Forecasting is divided into several sections:

Current Pipeline Values: if the profile is set to yes in your Forecasting profile preferences, you will see the dynamic amounts available in the subordinates current pipeline

Submitted Pipeline Values: display the values of the pipeline at the time that the subordinate last submitted their forecasts

Submitted Forecast Values: displays the forecast amounts that the salesperson or group has most recently committed to for the forecast period. If no forecasts have been submitted for the period, the Submitted Forecasts Values section will be blank.

Submitted Date, Attachments, and Notes from the subordinates are displayed, if available

Pipeline values are set by the system administrator and include opportunities which have statuses which are forecastable. Additionally, the default forecast values are based on profiles, under "Default New Rows in Worksheet" where the options are zero and pipeline.

To verify the opportunities included in a pipeline, click the Pipeline link. This displays a list of all forecastable opportunities with a forecast date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities.

If you have submitted previous forecasts, the last submitted values will appear in the forecast values.</td></tr>
</table>

Note: Forecasting numbers are rounded down to the nearest whole dollar.

Forecasting Subtabs

The Forecasting tab consists of five subtabs: Forecast, Opportunity, Product Category, Generate Forecast, and Reports

The following tasks can be performed from one of the Forecast subtabs:

- Create and submit forecast
- View forecast history
- Automatically submit worksheets
- Create attachments
- Create forecast notes
- View opportunity worksheets
- View product category worksheets
- Create opportunity level forecasts using opportunity worksheet
- Create product level forecasts using product category worksheet
- View product category forecast history
- View opportunity forecast history
- Generate forecast
- View Compensation Summary

Creating and Submitting Forecasts

Prerequisites

In general, you will create a forecast after you have created either a product category worksheet and/or an opportunity worksheet, and reviewed your subordinates forecasts and submitted worksheets.

Steps

Follow these steps to create and submit Forecasts:

1. From the **Forecast** tab, click the **Forecast** subtab.
2. Select the Sales Group for which you want to forecast, from the drop down list. If you work in multiple groups, you must submit multiple forecasts; one per group.
3. Select the Period Type and Period Name from the drop down lists.
4. Choose the Forecast Category from the drop down list.

The Forecast Category is a grouping of product categories for which you want to forecast.

5. Click **Apply**.

   Note: Your forecast currency is displayed. To change the forecast currency, go to the Profiles icon, select the Forecasting link.

6. Update Worst Case, Forecast, and Best Case with the amounts that you want to submit to management and click the **Submit Forecast and Worksheets** button.

Automatically Submitting Worksheets

Sales Managers and Sales Representatives can automatically submit worksheets by setting the profile option "Auto Submit Forecast Worksheets" to one of the following: None, Opportunity, Product Category, or Both. In accordance with your profile preferences for "Auto Submit Worksheets" and "Default Worksheets Values" you will submit worksheets according to preferences outlined in the table below. For instance, if you have saved a worksheet and you have turned on the Auto Submit feature then your saved worksheet will not be submitted, in place of your saved worksheet, Sales Online will submit a worksheet based on the "Default Worksheets Values" you have selected.

The option which is currently selected is displayed on the Forecast Main page.

Prerequisites

You must set profile preferences. See Setting Forecasting Preferences.

Steps

Follow these steps to set up automatic submission of worksheets:

1. From any page in Sales Online, click the **Profile** icon in the upper right of the page.
2. Under Sales Online Preferences, click the **Forecasting** link.
3. From the Autosubmit Worksheet drop down list, select your preference.
4. Click **Update**.

The following table describes the Auto Submit Profiles.

Auto Submit Profiles

Auto Submit Worksheets Profile	Default Worksheet Values Profile	How it works
None	N/A	The main forecast is submitted. Any previously saved worksheets are submitted with the main forecast.
Opportunity	0	The main forecast is submitted. The opportunity worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Opportunity	Pipeline	The main forecast is submitted. The opportunity worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.
Product Category	0	The main forecast is submitted. The product category worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Product Category	Pipeline	The main forecast is submitted. The product category worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.
Both	0	The main forecast is submitted. The opportunity and product category worksheets are submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Both	Pipeline	The main forecast is submitted. The opportunity and product category worksheets are submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.

Viewing Forecast History

The Forecast History shows you a list of all previously submitted forecasts for a period.

Follow these steps to view forecast history:

Prerequisite

You can view forecast history after they have been saved AND submitted. If you save a forecast without submitting the forecast, you cannot view it within the forecast history.

Steps

1. From the **Forecast** tab, click the **Forecast History** link.

   The Forecast History page opens.

2. You can click the Opportunity or Product Category Worksheet link to view either worksheet.

Adding an Attachment (Forecast)

Use this feature to provide relevant backup information to your manager about your forecast numbers.

You can add an attachment to an existing forecast by following these steps:

Prerequisite

A forecast must already exist.

Steps

1. From the **Forecast tab > Forecast subtab**, select an existing forecast.
2. Click the Attachments link.
3. Click **Add**.

   The Add Attachment page opens.

4. Enter a description, click **Text**, **File**, or **URL**.
5. Enter Text, click Browse to search for the document, or enter the URL.
6. Click **Create**.

Attachments are submitted to management along with your forecast numbers and can be viewed by your manager in the subordinate section of the main forecast page.

Adding a Note (Forecast)

Use this feature to share information with your manager regarding your forecast numbers.

Follow these steps to add a note:

Prerequisites

A forecast must already exist.

Steps

1. From the **Forecast** tab, click the **Notes** icon.

   In the Forecast-Notes page opens.

1. Select a Type from the drop down list.

   You can change the default type using Profiles.

2. Optionally, select the box labeled Private if you do not want your sales team members to view this note.

3. Enter your notes in the text box.

4. Click **Create**

Forecast Notes are submitted to management along with forecast numbers.

Note: You cannot edit notes once they are created.

Opportunity Worksheet

Opportunity Level Forecasting provides a tool for salespeople to create their own view, and commitment, of the opportunities they are working with. Opportunity forecasting also gives salespeople the ability to review, adjust, and commit to the number submitted in forecasting at the opportunity level.

- Create Opportunity Level Forecast Using Opportunity Worksheet

Creating Opportunity Level Forecasts Using Opportunity Worksheets

Follow these steps to create opportunity worksheets:

Prerequisites

None

Steps

1. From the **Forecast** tab, click the **Opportunity** subtab.

   The Opportunity Worksheet page opens.

2. From the drop down list select the Sales Group for which you want to forecast.
3. Select the Period Type and Period Name from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. From the "Create Worksheet Using" radio buttons, select one of the following options:

   Previously Saved Values (default): If you are forecasting for the first time, the value is based on the Sales Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.

   Pipeline Default Amounts: This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

   If you have set up the Forecast profile, Default New Rows in Worksheet equal to Pipeline and status of opportunity equal to Won; then the Worst case, Forecast, and Best case amounts are all defaulted to the Opportunity amount.

   Pipeline defaults use the following criteria:

   Worst Case: Total Won Amount=Sum of all won opportunities

   Forecast: Weighted Pipeline=Weighted sum of open opportunity amount multiplied by their win probability

   Best Case: Total sum of all forecastable opportunities

   Subordinate Submitted Values: This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.

   Please note, ONLY managers are allowed to create worksheets using subordinate submitted values.

6. Click **Apply**.

   The page is refreshed with all the opportunities within your pipeline which are forecastable.

The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.

You can adjust the amounts in these fields to reflect your sales commitment.

7. Click **Save**.

The forecast will not be submitted by saving the worksheet, you must click the Submit Forecast and Worksheets button in the Forecast Main page.

Product Category Worksheet

Forecasting at the Product Category Level gives salespeople a way to view their pipeline aggregated into product categories. This allows salespeople to generate product level forecasts without having to go down to the opportunity level details.

- Create Product Level Forecast Using Product Category Worksheet

Creating Product Level Forecasts Using Product Category Worksheets

Follow these steps to create product level forecasts using product category worksheets:

Prerequisites

None

Steps

1. From the **Forecast** tab, click the **Product Category** subtab.

   The Product Category Worksheet page opens.

2. From the drop down list select the Sales Group for which you want to forecast.
3. Select the Period Type and Period Name from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. From the Create Worksheet Using radio buttons, select one of the following options:

   Previously Saved Values (default): If you are forecasting for the first time, the value is based on the Sales Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.

Pipeline Default Amounts: This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

Pipeline defaults use the following criteria:

Worst Case: Total Won Amount=Sum of all won opportunities

Forecast: Weighted Pipeline=Weighted sum of open opportunity amount multiplied by their win probability

Best Case: Total sum of all open opportunities

Subordinate Submitted Values: This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.

Please note, only managers are allowed to create worksheets using subordinate submitted values

6. Click **Apply**.

   The page is refreshed with all the opportunities within your pipeline which are forecastable.

   The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.

   You can adjust the amounts in these fields to reflect your sales commitment.

7. Click **Save**.

The forecast will not be submitted by saving the worksheet, you must click the Submit button.

Viewing Product Category History

You can view the Product Category Worksheet History by following these steps:

Prerequisites

Previous product category forecasts must have been submitted.

Steps

1. From the **Forecast tab**, click the **Product Category** subtab.
2. Click **Product Category Worksheet**.

3. Click the **History** button, to view the history of all previous forecast submissions for this product category.

   Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted. Product Category history is based on product category and not sales groups or sales teams.

Viewing Opportunity Worksheet History

You can view the Opportunity Worksheet History by following these steps:

Prerequisites

Previous opportunity forecasts must have been submitted.

Steps

1. From the **Forecast** tab, click the **Opportunity** subtab.
2. Click **Opportunity Worksheet**.
3. Click the **History** button, to view the history of all previous forecast submissions for this opportunity for all periods, groups, and roles, in descending submitted date.

Generate Forecast

Under the Forecast tab, you will find the Generate Forecast subtab. Sales representatives can generate forecasts for multiple periods from this page.

Please note, sales managers cannot generate forecasts. If a person is logged in as a sales manager and attempts to generate a forecast for multiple periods, they will receive the following error message "You do not have access to generate forecast."

The number of months for which the sales rep can generate forecast in a single process is determined by the profile OSO: Forecast Max Generate Months. The default is six months.

Prerequisites

Set up profile OSO: Forecast Max Generate Months. See the *Oracle Sales Online Implementation Guide*, profiles chapter.

Steps

Follow these steps to generate a forecast:

1. From the Sales Group section, select a sales group from the drop down list.
2. From the Forecast section, select the Period Type from the drop down list.
3. Select the "From Period" and "To Period" from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. Click **View**.

   Displays the values that will be generated for your forecast.
6. Select all periods for which you want to generate forecasts by selecting the check box.
7. Click **Submit**.
8. Click the period's link to view the forecast.

View Compensation Summary

When a manager is viewing their subordinates forecasts, managers can link directly to the year to date compensation information for each subordinate.

From the subordinates forecast, click the Compensation link.

Forecast Reports

From the Forecast tab, you can view several reports by clicking the Reports subtab. The Forecast Reports subtab is divided into three sections; Forecast Reports, My Reports, and Charts. The Forecast Reports section includes all the seeded reports. In My Reports, you can create your own report criteria and save the search with a report name. These reports will appear in My Reports.

- View Forecast Summary by Product Category
- View Forecast Comparison Report
- View Forecast History Report

Viewing Forecast Summary by Product Category

The Forecast Summary Report by Product Category shows a detailed list of all opportunities which are included in forecasting based on the forecast date at the opportunity line instead of the close date at the opportunity header level. This includes opportunity worksheet forecast information.

Follow these steps to view the Forecast Summary Report by Product Category:

Prerequisites

None

Steps

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Summary Report by Product Category** link.

   The Create Forecast Summary by Product Category Report page opens.

Under the Filters section you can select from any of the following filters.

1. Select the Period Type from the drop down list.
2. Select the Period for which you want to run the report.

   The Credit Type is set to Forecast Credits.
3. Select a Business Line from the list of values.
4. Select a Status from the list of values.
5. Select a Channel from the list of values.
6. Enter an Opportunity Name.
7. Enter a Salesperson full or partial name and click **Go**.
8. Enter a Partner full or partial name and click **Go**.
9. Select the Product Category from the list of values.
10. Select a Sales Stage from the list of values.
11. Select a Win Probability from the drop down list.
12. Enter a project name.

Under the Display Options, you can select from the following choices:

1. Select a Reporting Currency from the drop down list.

2. Select a Product Category by selecting the radio button.
3. Select a Threshold Amount.
4. Select a Worksheet Type from the drop down list.
5. Select the "Exclude deals where all forecast amounts are 0.00" if you want to exclude those items.
6. Add Displayed Columns from the Available Columns by using the > button. To remove Displayed Columns use the < button. If you want to add all the Available Columns to the Displayed Columns area use >> button.
7. Select your preference from the "Columns will be scaled as" drop down list.
8. Choose the Sort Rows by, Then by, Finally by options from each drop down list.
9. In the Save Report section, you can **Save the report**, **Save and Run the report**, or **Run the report** by clicking the respective button.

Viewing Forecast Comparison Report

This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet.

Follow these steps to view the Forecast Comparison Report:

Prerequisites

None

Steps

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Comparison Report** link.
3. Select Forecast 1 filters.
4. Select Forecast 2 filters
5. Select Display Options.
6. Select Reporting Currency and Scaling.
7. Enter a Report Name.
8. Click **Save**.

9. If you want to display the report on your home page, select the check box.

Viewing Forecast History Report

This report shows submitted pipeline and forecast values for the salespeople selected. A link is available to view the submitted opportunity or product category worksheet. Please note, you cannot view a Forecast History Report for another manager, only sales reps' reports are available for viewing.

Follow these steps to view the Forecast History Report:

Prerequisites

None

Steps

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast History Report** link.
3. Select the Period Type from the drop down list.
4. Select the Sales Group from the drop down list.
5. Before selecting the "Period" from the drop down list, select "To" from the drop down list.
6. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking **Go**.
7. Enter a Report Name.
8. Select from the radio buttons, Always run using current period or Always run using indicated period.
9. Select the Display on Home Page button to display the report on your home page.
10. Click **Run Report**.
11. Click **Download Report**, to download the report to a spreadsheet application.

Customer Tab

The Customer tab is comprised of two subtabs, Organization and Person.

From the Organization subtab, you can perform the following functions:

- Personalize organization summary
- Create, maintain, and search organizations
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Add and maintain sales team members
- Create and maintain tasks
- View interactions
- Create and maintain attachments
- View 360 degree view of organization

From the Person subtab, you can perform the following functions:

- Personalize person summary
- Create, maintain, search for people
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Create and maintain sales teams
- Create and maintain tasks
- View interactions
- Create and maintain attachments
- Send collateral

By default, the Customer tab opens to the Organization Summary page. Use the Customer tab to create and maintain organizations, people, and relationships.

Organization Subtab

From the Organization subtab, you can perform the following functions:

- Personalize organization summary
- Create, maintain, and search organizations
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Add and maintain sales team members
- Create and maintain tasks
- View interactions
- Create and maintain attachments
- View 360 degree view of organization

By default, the Customer tab opens to the Organization Summary page. Use the Customer tab to create and maintain organizations, people, and relationships.

Organization Summary

The Organization main page, "My Organizations", displays all organizations for which you are on the sales team. You can quickly display your own lists every time you click the Organization subtab by personalizing the organization summary. For instance, you can define your own list of "Organizations with over 1,000 employees".

- Personalizing Organization Summary

Personalizing Organization Summary

Prerequisites

None

Steps

Follow these steps to personalize the organization summary page:

1. From the **Customer** tab, make sure you are on the **Organization** subtab.

2. Click **Personalize**.
3. Change, add, or remove parameters.
4. Change, add, or remove display options.
5. Change, add, or remove sort options.
6. Enter a Search Name.
7. Select the Use as Summary Page Default check box.
8. Click **Save**, or **Save and Apply Search**.

   Saved Searches appear in a drop down list on the Organization page.

Note: The Advanced Search link and Personalize button take you to the same Organization Search page.

Creating an Organization

Prerequisites

None

Steps

Follow these steps to create a new organization:

1. From the **Customer** tab, click the **Organization** subtab.
2. From the Organization Summary page, click **Create**.
3. Enter the required information and optional information. See the table below for detailed descriptions of each field.

The following table describes the Create Organization fields.

Create Organization Fields

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Alias	No	Enter an alias, if applicable.
Phone Number	No	Enter a phone number.
Email Address	No	Enter the organization’s email address.

Field	Required Field	Description
Business Line	No	Enter a business line.
Annual Revenue	No	Select a currency from the drop down list. Enter the annual revenue.
Fiscal Year End	No	Enter the fiscal year end.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the org was established.
Web Site	No	Enter the web site address.
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization.
Reg Number	No	Enter a reg number, if applicable.
SIC Code Type	No	Select from the drop down list.
SIC Code	No	Enter an SIC code and click Go. SIC Code Version and SIC Code cannot be modified unless a valid selection is made using the SIC Code List of Values.
Phone Type	No	Select from the drop down list.
Customer Category	No	Select customer category from the drop down list.
DUNS Number	No	Enter a Dunn and Bradstreet Number.
Tax ID	No	Enter the tax identification code.

The following table describes fields in the Address section of Create Organization.

Address Fields

Field	Required Field	Description
Address Type	No	Select an address type from the list of values.
Address Line 1	Yes	Enter the organization address.
Address Line 2	No	Enter additional organization address information.
City	No	Enter in the city field.
State	No	Select from the drop down list.

Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
County	No	Enter in the county field.
Country	Yes	Select country from the drop down list.
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.
Inactive	No	Select the check box to make the org inactive

In the Person Relationships section, you can add a person relationship.

If you want to enter person relationships, you can add an existing person by entering the last name in the Add a Person field and clicking **Go**. You can create a relationship with a person, who does not exist in the database yet, by entering the required information directly into the fields. When you click Update, the person is created in the database.

The following table describes fields in the Person Relationship section of Create Organization.

Person Relationship Fields

Field	Required Field	Description
Erase	No	To erase a relationship from the summary table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	Yes	Enter the first name.
Last Name	Yes	Enter the last name.
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Addressbook	No	Select an email address by clicking the email addressbook icon.

Job Title	No	Enter a job title.
Decision Maker	No	Select the check box if the person is a decision maker.

The following table describes Organization Relationship fields in Create Organization.

Organization Relationship Fields

Field	Required Field	Description
Erase	No	To erase a relationship from the summary table, click the erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Related Organization	Yes	This field holds the name of the related organization.
Inactive	No	Select if you want to indicate that the organization relationship is inactive.
Start Date	Yes	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

4. After you have completed entering the information, scroll to the bottom of the page, click **Create**.
5. You have successfully created an organization when the Organization Detail Main page opens. The organization number is generated by the system.

Maintaining Organization Detail

Prerequisites

An organization must exist. See Creating an Organization.

Steps

Follow these steps to edit an existing organization:

1. From the **Customer** tab, click the **Organization** subtab.

2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.

   2. Select search filters and display options.
   3. If you want to save the search, enter a Search Name.
   4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. To select an organization, click the organization's link.

   The Organization Detail Main page opens.

4. Add or update information.

The following table describes the Organization Detail fields.

Organization Detail Fields

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Alias	No	Enter an alias, if applicable.
Phone Number	No	Enter a phone number.
Email Address	No	Enter the organization's email address.
Customer Category	No	Select from the drop down list.
Annual Revenue	No	Select a currency from the drop down list. Enter the annual revenue.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the org was established.
Web Site	No	Enter the web site address.

Field	Required Field	Description
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization.
Inactive	No	Select the check box to indicate the org is inactive.
Reg Number	No	Enter a reg number, if applicable.
SIC Code Type	No	Select from the drop down list.
SIC Code	No	Enter an SIC code and click Go. SIC Code Version and SIC Code cannot be modified unless a valid selection is made using the SIC Code List of Values.
DUNS Number	No	Enter a Dunn and Bradstreet Number.
Business Line	No	Enter a business line.
Tax ID	No	Enter the tax identification code.
Fiscal Year End	No	Enter the fiscal year end.
Lifetime Value	No	
Last Order Date	No	
Status	No	Read only field.

5. In the Addresses section you can view or edit information such as:
   - Map It: Map the address by clicking the icon
   - Primary Address: Main address used to identify the organization
   - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
   - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
   - Address History: Address history of the organization
   - Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
   - Type: Displays the address type indicated in the details

To create an address, click **Create Address** and follow these steps:

1. Enter the address.
2. Enter the city.
3. Select the state and province from the drop down list.
4. Enter the postal code.
5. Select the country from the drop down list.
6. Select a start date by clicking the calendar icon.
7. Select a status from the drop down list.
8. Optionally, enter the county.
9. Select a start date by clicking the calendar icon.
10. In the Address Types section, select Address Type from the list of values.
11. Select an Inactive status by selecting the check box.
12. Click **Create**.

    The Organization Detail page opens.

6. Click **Update**.

Searching for an Organization

Prerequisites

An organization must exist. See Creating an Organization.

Steps

Follow these steps to search for an organization:

1. From the **Customer** tab, choose the **Organization** subtab
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Organization Search page opens.

2. Select search filters and display options.

3. If you want to save the search, enter a Search Name,.

4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

Creating and Maintaining Relationships (Organization)

Organizations can have two types of relationships; Organization to Organization and Organization to Person. Use Organization to Organization relationships to create parent and subsidiary, headquarters and division, partner, and competitor relationships. Use Organization to Person relationships to create business contact relationships. Please note, creating a relationship of "competitor" from party A to party B, does not automatically create the reciprocol relationship (i.e., party B is not automatically created as a competitor to party A).

The Relationships link takes you to the Relationships summary page. From this summary table you can view existing Organization to Organization, Organization to Person relationships, multiple relationship addresses, phone number, start date, end date, and relationship status.

- Create an Organization to Organization Relationship
- Create an Organization to Person Relationship

Creating an Organization to Organization Relationship

Prerequisites

None

Steps

Follow these steps to create a new organization to organization relationship:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table, using Quick Find or Advanced Search.

   To search using **Quick Find**:

1. Choose Organization from the drop down list.
2. Enter the partial name of the organization for which you are searching.
3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Organization Search page opens.

2. Select search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Click the organization link to select it.

   The Organization Detail Main page opens once you have selected an organization.

3. Click the **Relationships** link.
4. In the Add an Organization field, enter the name, or partial name.
5. Click **Go**.

   The search results page opens with the name and all addresses of the organization. Addresses are read-only.

6. From the Search Results page, click the organization link to select the organization for which you want to create a relationship.

   The Organization Detail Main page opens and the Related Organization field, a required field, is populated.

7. Choose a Relationship Type from the drop down list.
8. Optionally, enter a start and/or end date. If a start date is not entered, the field will default to the current date when you click **Update**.
9. Click **Update**.
10. After saving the relationship, the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. Additionally, the Related Organization will become a link and you can view the related organization’s detail by clicking to select it.

11. From the Organization to Organization Relationship Detail page you can change the end dates, select a relationship address, add Notes, Tasks, Interactions, and Attachments.

    Note: The address of the relationship is either the address of the related organization or person.

Creating an Organization to Person Relationship

Prerequisites

None

Steps

Follow these steps to create a new organization to person relationship:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table, using Quick Find or Advanced Search.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching using % as a wildcard.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.
   2. Select search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
2. Click the organization link to select it.

   The Organization Detail Main page opens once you have selected an organization.
3. Click the **Relationships** link.
4. In the Add a Person field, enter the name, or partial name.

5. Click **Go**.
6. Choose from the list of people or, if you do not find the person for which you are looking, enter the new information directly into the Person to Organization Relationship table.
7. Choose a Relationship Type from the drop down list.
8. Optionally, enter you can enter phone number, email address, job titles, or send collateral.
9. Click **Update**.
10. After saving the relationship the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. From the Relationship Detail page you can change the end date, addresses, and add other details such as mail stop, roles, manager information, and job title. Additionally, you can add Notes, Tasks, Interactions, and Attachments to the relationship detail.

    Note: The address of the relationship is either the address of the related organization or person.

Creating and Maintaining Opportunities (Organization)

You can create and maintain opportunities, in the context of a specific organization, by using the following steps.

Prerequisites

The organization must exist.

Steps

Follow these steps to create a new opportunity:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table, using Quick Find or Advanced Search.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Organization Search page opens.

2. Select search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Click the organization link to select it.

   The Organization Detail Main page opens once you have selected an organization.

3. Click the **Opportunities** link.

   You will see a summary of all opportunities for the specific organization.

4. From the summary table, you select the columns that you want to display by clicking the **Personalize** icon located next to the Create button.

   You can choose to view information such as Sales Stage, Win Probability, Status, Close Date, and Amount by changing the Display Options on the Opportunity Table Personalization page.

5. Click **Create** to create a new opportunity.

   The organization name will default to the name of the organization that you have created or the organization for which you are viewing the details.

6. Enter the customer address and opportunity name. Additionally, enter any other information.
7. Click **Create**.

   The Opportunity Detail page opens.

8. Optionally, enter additional information on the Opportunity Detail page or click the link to return to the organization detail.

   The opportunity that you have created will appear in the opportunity summary table.

Notes (Organization)

In order to better support and service your customers, you can enter comments into a free form text field that you can archive and share with others in your organization. The Notes tab represents a log of information that is stored about a particular organization.

- Create a Note
- View a Note

Creating a Note (Organization)

Prerequisites

The organization must exist.

Steps

Follow these steps to create a note:

1. From the **Customer** tab, choose an organization.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.

   2. Select search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Click the organization link to select it.

   The Organization Detail Main page opens.

3. Click the **Notes** link.
4. Select a Type from the drop down list.

   You can change the default type using Profiles.

5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.

6. Enter your notes in the text box.
7. Click **Create**.

Note: You cannot edit notes once they are created.

Viewing a Note (Organization)

Prerequisites

The note must exist.

Steps

Follow these steps to view a note:

1. From the **Customer** tab, choose an organization.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.

   2. Select search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Click the organization link to select it.

   The Organization Detail Main page opens.

3. Click the **Notes** link.
4. Select a Type from the drop down list.

   The default type can be changed using Profiles.

5. Choose the number of days for which you want the notes history.
6. Click **Apply**.

7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
8. To view "All Notes" in a printable version, click the All Notes button.

Note: Your profile set up determines the number of rows that will display in your notes table.

If there are more records than you have chosen to display, click Next at the bottom of the table to view more records.

Sales Teams (Organization)

Sales teams represent all of the salespeople and partners that have ownership of a specific customer or opportunity. Sales team members can have full access or non-full access (view only) ownership.

- Add a sales team member
- Add a partner
- Add a resource team
- Remove a sales team member

Adding a Sales Team Member (Organization)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.

   2. Select search filters and display options.

   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click the organization link to select it.

   The Organization Detail Main page opens.

4. Click the **Sales Team** link.

5. Enter the last name or partial name of the sales representative in the Add a Salesperson field.

6. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.

7. Click the salesperson link.

8. Click **Update**.

If you want to associate this salesperson with a customer location for the purpose of territory assignment:

1. Enter the location or partial location.

2. Click **Go**.

Adding a Partner (Organization)

Prerequisites

None

Steps

If you want to add a partner to a sales team, follow these steps:

1. From the **Customer** tab, choose an organization.

2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

    2. Enter the partial name of the organization for which you are searching.
    3. Click **Go**.

    To search using **Advanced Search**:

    1. Click the **Advanced Search** link.

       The Organization Search page opens.
    2. Select search filters and display options.
    3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click the organization link to select it.

   The Organization Detail Main page opens.
4. Click the **Sales Team** link.
5. Enter the partner name in the "Add a Partner" field, click **Go**.

   It is recommended that you search by last name only.
6. Select a partner from the search results list.
7. Click **Update**.

You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner.

Adding a Resource Team (Organization)

Prerequisites

None

Steps

To add a resource team to a sales team, follow these steps:

1. From the Customer tab, select an organization:

   To search using **Quick Find**:

    1. Choose Organization from the drop down list.
    2. Enter the full or partial name of the organization. If you enter a partial name, use the % key as a wild card.

3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

 The Organization Search page opens.

2. Enter search filters and display options.
3. Click **Search**.

2. Click the organization link to select it.

The Organization Detail page opens.

3. Click the **Sales Team** link.
4. In the Add a Resource field, enter the resource name and click **Go**.
5. Select a resource team from the search results page by clicking the link.
6. Click **Update.**

Each member of the resource team will be added to the sales team table.

Removing a Sales Team Member (Organization)

Prerequisites

The sales team member must be on the sales team.

Steps

Follow these steps to remove a sales team member:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

To search using **Quick Find**:

1. Choose Organization from the drop down list.
2. Enter the partial name of the organization for which you are searching.
3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

The Organization Search page opens.

2. Select search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click the organization link to select it.

   The Organization Detail Main page opens.

4. Click the **Sales Team** link.
5. Locate the salesperson that you want to remove on the summary table.
6. Select the Remove check box.
7. Click **Update**.

Tasks (Organization)

Tasks provide a way of tracking current and future customer or opportunity activities by providing a list of action items for a specific date range, as well as maintaining a history of activities. You can create tasks for yourself, assign tasks to others in your organization, and associate tasks with specific organizations.

- Create a task
- Maintain task details
- Add an attachment to a task

Creating a Task (Organization)

Prerequisites

None

Steps

Follow these steps to create a task:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

2. Enter the partial name of the organization for which you are searching.
3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Organization Search page opens.

2. Select search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click the organization link to select it.

   The Organization Detail Main page opens.

4. Click the **Sales Team** link.
5. Click the **Tasks** link.
6. Click **Create**.

   The Create Task page opens.

7. Click the Tasks link.
8. Select a task date by clicking the calendar icon.
9. Enter a task name.
10. Select a priority from the drop down list.
11. Select a task type.
12. Select a task status.
13. Indicate the task owner.
14. Include private tasks by selecting the check box.
15. Optionally, you can relate the task to an opportunity, organization, person or relationship, click **Go**.

    The default, since you are creating the task in the context of an organization, is related to that organization.

16. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

Maintaining Task Details (Organization)

Steps

Follow these steps to view a task:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.

   2. Select search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Click the organization link to select it.

   The Organization Detail Main page opens.
4. Click the Tasks link.

   The summary table displays all tasks for the person.
5. Click the task link to view details.

   The Task Detail page opens.

The following table describes the Task Detail fields.

Task Detail Fields

Field	Required Field	Description
Task Type	Yes	Select the task type from the drop down list.
Private	No	Select the check box if you want the task to be viewable only by the creator of the task.

Field	Required Field	Description
Task Name	Yes	Enter the task name.
Task Description	No	Enter a description.
Priority	No	Select priority from the drop down list.
Status	No	Select the task status from the drop down list.
Date	Yes	Select a date by clicking the calendar and choosing a date.
Start Time	No	Select a time from the drop down lists. Start and end time for a task must be on the same day.
End Time	No	Select an end time for the task from the drop down list. Start and end time for a task must be on the same day.
Owner	Yes	Enter the full or partial name, using % as a wildcard, and click **Go**. Select from the search results.
Relate To	No	Select the related item (opportunity, organization, person, quote, or relationship) from the drop down list. Enter the full or partial item name and click Go.

6. Click **Update**.

Adding an Attachment to a Task (Organization)

Prerequisites

The task must exist. See Creating a Task.

Steps

Follow these steps to add an attachment:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

2. Enter the partial name of the organization for which you are searching.
3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Organization Search page opens.
2. Select search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click the organization link to select it.

   The Organization Detail Main page opens.
4. Click the **Attachments** link.
5. Click the **Add** button.

   The Add Attachment page opens.
6. Enter a description, click **Text**, **File**, or **URL**.
7. Enter Text, click Browse to search for the document, or enter the URL.
8. Click **Create** or **Clear**.

Interactions (Organization)

Interactions are customer touch-points that you can view through the Customer tab. You can view interactions entered by sales, marketing, and service department representatives.

- View Interactions

Viewing Interactions (Organization)

Prerequisites

The interaction must exist.

Steps

Follow these steps to view interactions:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.

   2. Select search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click the organization link to select it.

   The Organization Detail Main page opens.

4. Click the **Interactions** link.
5. Select search filters.
6. Click **Apply**.

Note: Sales Online users cannot create interactions.

Attachments (Organization)

Attachments are defined as physical documents, URLs, or text. The typical use of attachments is for sharing and storing information about an organization. For example, you can attach a press release about the organization.

- Add an Attachment
- View an Existing Attachment

Adding an Attachment (Organization)

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Organization Search page opens.
   2. Select search filters and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Click the organization link to select it.

   The Organization Detail Main page opens.
4. Click the **Attachments** link.
5. Click **Add**.

   The Add Attachment page opens.
6. Enter a description, click **Text**, **File**, or **URL**.
7. Enter Text, click Browse to search for the document, or enter the URL.
8. Click **Create**.

Viewing an Existing Attachment (Organization)

To view an existing attachment, click the attachment link.

- Link to Adding an Attachment

360 Degree View (Organization)

The 360 degree view provides you with a way to look at the enterprise level activities of your organization. You can browse orders, invoices, returns, products, and service requests in detail by clicking the link. If the organization has several accounts, choose one from the drop down list. Additionally you can drill down into the details of each order by clicking the details link.

- View 360 Degrees

Viewing 360 Degrees (Organization)

In order to use the 360 degree view, you must have iStore installed to view orders, Install Base to view products installed, and iSupport to view the Invoices, Returns, and Service Requests. For more information about iStore, Install Base, and iSupport please refer to the *Oracle iStore and Oracle iMarketing Implementation Guide* and *Oracle iSupport Implementation Guide*.

Prerequisites

None

Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, choose an organization.

   The Organization Detail Main page opens.

2. Click the **360 View** link.

   A new Organization Detail page, specific to the 360 Degree View, opens.

3. You can view summary pages for each of the following by clicking each link:

   - Orders
   - Invoices
   - Returns

- Products
- Service Requests

Person Subtab

The following tasks can be performed from the Person subtab:

- Personalize person summary
- Create, maintain, search for people
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Create and maintain sales teams
- Create and maintain tasks
- View interactions
- Create and maintain attachments
- Send collateral

Person Summary

Within the Customer tab you will find the Person subtab. From this page, you can maintain information displayed in the summary table, change your summary view, or send collateral.

- Personalizing Person Summary

Personalizing Person Summary

You can use the Personalize button to define your own list of People or Person Relationships. The default view is "My Person Relationships" where you will see details for people who have existing relationships.

Steps

Follow these steps to personalize the person summary:

1. From the **Customer** tab, choose the **Person** subtab.

2. Click **Personalize**.
3. Either choose an existing search by selecting it from the drop down list and click **Go** OR select the Display Relationship Information or Display Person radio buttons. If you choose Display Relationship Information, your search results will show people who have relationships with organizations and people. If you choose Display Person Information, your search results will only show people for which you are on the sales team, without any relationship details.

   If you want to view people for which relationships do not exist, for example, an independent consumer who is not a contact for an organization, adjust your search criteria by selecting the Display Person Information radio button.
4. Enter search criteria in Person, Address, Sales Team, Relationship sections, if desired.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search**. If you want to search without saving the search, click **Search**.

   Saved Searches appear in a drop down list on the Person page.

Note: The Advanced Search link and Personalize button take you to the same People Search page.

Updating Person Summary Table

Depending on the fields you have selected to display on your summary table, some fields are updateable.

Steps

Follow these steps to update a summary table:

1. From the **Customer** tab, click the **Person** subtab.
2. To edit the phone number, select the phonebook icon and select a phone number.
3. To edit the email address, select the email addressbook icon and select another email address.
4. If you want this person to receive collateral, select the Collateral Recipient check box and click **Send Collateral**.

5. Click **Update**.

Sending Collateral from the Person Summary Table

Steps

Follow these steps to send collateral:

1. From the **Customer** tab, click the **Person** subtab.
2. Select the individual's **Collateral Recipient** check box or use the **Select All** button to select all in the summary table.
3. Click **Send Collateral**.
4. You will be prompted to complete the fulfillment request.

   Please refer to the Fulfillment tab for further instructions.

Creating a Person

Steps

Follow these steps to create a person from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.
2. Click **Create**.

   The Create Person page opens.

The following table describes information that you can enter in the Create Person section.

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.
Preferred Name	No	Enter a preferred name, if applicable.
Middle Name	No	Enter a middle name, if applicable.
Title	No	Select a title from the drop down list.
Second Title	No	Enter a second titl.

Field	Required Field	Description
Suffix	No	Enter a suffix, if applicable.
Do Not Mail Checkbox	No	Select the check box if you do not want mail to be distributed to this organization.

The following table describes information that you can enter in the Business Information section.

Business Information Fields

Field	Required Field	Description
Relationship	No	Select a relationship from the drop down list.
Organization	No	Select an organization.
Address	No	Defaulted depending on organization selected.
Mail stop	No	Enter the mail stop.
Manager	No	Find the manager by entering the full or partial name and clicking **Go**.
Department	No	Enter the department, if applicable.
Department Type	No	Select from the drop down list.
Job Title	No	Enter a job title.
Job Title Type	No	Select from the drop down list.
Role	No	Select a role from the drop down list.
Preferred Language	No	Select from the drop down list.
Business Phone	No	Enter a phone number.
Phone Type	No	Select from the drop down list.
Start Date	No	Select a date by clicking the calendar icon.
End Date	No	Select a date by clicking the calendar icon.
Business Email Address	No	
Decision Maker	No	Select the check box to indicate that the person is a decision maker.

Field	Required Field	Description
Reference	No	Select the check box to indicate the person can be considered a reference.

The following table describes information that you can enter in the Personal Information section.

Personal Information Fields

Field	Required Field	Description
Personal Phone	No	Enter a phone number.
Phone Type	No	Select from the drop down list.
Personal Email Address	No	Enter the email address.
Address Type	No	Select from the list of values
Address Lines	No	Enter information into the address fields
City	No	Enter city
State	No	Enter state
Province	No	Select from the drop down list.
Postal Code	No	Enter postal code
County	No	Enter information into the field
Country	No	Select from the drop down list.
Start Date	No	Select by clicking the calendar icon and choosing a date
End Date	No	Select by clicking the calendar icon and choosing a date
Do Not Mail	No	Select the check box to indicate "do not mail"
Inactivate	No	Select the check box to inactivate.

3. In the Notes sections, you can enter notes associated with this person.
   1. Select the note type from the drop down list.
   2. Enter text in the Text box.

You have successfully created a person when the Person Detail Main page opens.

4. Click **Create**.

Maintaining Person Details

Steps

Follow these steps to maintain person details from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.

   To maintain an existing person, search for the person by:

2. Select **Quick Find** or **Advanced Search**.

   To search using the **Quick Find** function:

   1. Choose People from the drop down list.
   2. Enter the person's full or partial name.
   3. Click **Go**.

   To search using the **Advanced Search** function:

   1. Click the **Advanced Search** link.

      The Person Search page opens.

   2. Enter search filter information and display options.
   3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person from the Search Results page by clicking the person's link.

   The Person Detail page opens.

   The following table describes the Person Details fields.

Person Detail Fields

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.
Preferred Name	No	Enter the preferred name.

Field	Required Field	Description
Middle Name	No	Enter the middle name.
Title	No	Select a title from the drop down list.
Second Title	No	Enter the second title, if desired.
Suffix	No	Enter a suffix, such as Mr., Mrs., Ms., Dr.
Personal Phone Book	No	To change the phone number, click the phone book icon.
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.
Lifetime Value	No	View the lifetime value of the person.
Last Order Date	No	View the last order date.
Inactive	No	Select the check box to indicate that the record is inactive.
Do Not Mail	No	Select the check box to indicate no mail status

4. In the Personal Addresses section you can edit information such as:
   - Map It: Map the address by clicking the icon
   - Primary Address: Main address used to identify the person
   - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
   - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
   - Address History: Address history of the person
   - Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
   - Type: Displays the address type indicated in the details
   - Create Address: To create an address, click **Create Address**
5. In the Product Interests section you can edit information such as:
   - Remove: To remove a product interest item, select the Remove check box
   - Product: Select a product from the drop down list
   - Comments: Enter comments directly into the comments field

6. In the Personal Interests section you can edit information such as:
   - Interest Type: Select an interest from the drop down list
   - Comments: Enter comments directly into the comments field
7. Click **Update**.

You can also get directions to the address by clicking the Map icon in the Map It column.

You can view a history of all the previous occupants of the physical address by clicking the **Address History** link.

Searching for a Person

In searching for a person you can choose what you want to display by choosing either the Display Relationship Information or Display Person Information radio buttons.

Steps

Follow these steps to search for a person from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial last name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.
   2. Enter search filters.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button. To use the list as a summary page default, select the "Use as Summary Page Default" check box.
   4. To select the person, click the person's link.

Creating and Maintaining Relationships (Person)

In Sales Online, People can have two types of relationships; Person to Organization and Person to Person. Each relationship is created by clicking the Relationship link from the Person subtab. You can display active, inactive, or all relationships for the person by selecting the appropriate value from the drop down list.

Please note, creating a relationship of "competitor" from party A to party B, does not automatically create the reciprocol relationship (i.e., party B is not automatically created as a competitor to party A).

The Relationships link takes you to the Relationships summary page. From this summary table you can view existing Person to Organization, Person to Person relationships, multiple relationship addresses, phone number, start date, end date, and relationship status.

- Create a person to organization relationship
- Create a person to person relationship

Creating a Person to Organization Relationship

Steps

Follow these steps to create a new person to organization relationship:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.

   2. Enter search filter information and display options.
   3. Click **Search**.
3. Click the person’s name link to select it.

The Person Detail Main page opens.

4. Click the Relationships link.
5. Click **Add Relationship** in the Person to Organization Relationships section.

   The Add Person to Organization Relationship page opens.
6. Search for an organization by entering the full or partial name of the organization in the "Select an Organization" field, and click **Go**.
7. From the Search Results page, select an organization for which you want to create a relationship by clicking the organization’s link. The organization will populate the related Organization field, a required field, on the relationship detail page.
8. Choose a Relationship Type from the drop down list.
9. Enter a Start Date and optionally enter an End Date. If you do not enter a start date, it will default to the current date.
10. Optionally, select a phone number by clicking the Phonebook icon.
11. Select a status from the drop down list.
12. In the Notes section, you can enter a note by selecting the note type from the drop down list, entering the note text in the text field.
13. Click **Create**.

    The Relationship Detail page opens. From this page you can edit details about the relationship, roles, and addresses.
    1. View the relationship type.
    2. Edit the start date by clicking the calendar icon and selecting another date.
    3. Edit the phone number by clicking the phone book icon.
    4. Edit the mailstop, department, job title.
    5. Select the preferred language from the drop down list.
    6. Select or unselect the Decision Maker and Reference check boxes.
14. Click **Update**.

    Additionally, you can add notes, tasks, interactions, and attachments.

Creating a Person to Person Relationship

Use these steps to create a relationship such as; Mary Kline reports to Ken Smith.

Steps

Follow these steps to create a person to person relationship:

1. From the **Customer** tab, choose the **Person** subtab.

   The People page opens

2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name using the % as a wildcard.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.

   2. Enter search filter information and display options.
   3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click a person’s name link to select it.

   You will create a relationship between this person and another person.

4. Click the **Relationships** link.

   From the Person Detail main page, you can do the following in the Person to Person Relationships section:

   - View active, inactive, or all relationships for this person
   - View start and end dates
   - View the status of the relationship

5. Click **Add Relationship**.

   The Add Person to Person Relationship page opens.

6. In the Select a Person field, enter the full or partial name using % as a wildcard.

7. Click **Go**.

   From the Search Results page, select the person for which you want to create the relationship by clicking the person’s link.

   The person’s name populates the related Person field, a required field, on the Relationship Detail page.

8. Enter the address.

9. Choose a Relationship Type from the drop down list.

10. Enter a Start Date.

11. Optionally, enter an End Date.

12. Optionally, select a phone number by clicking the Phonebook icon.

13. In the Notes section, you can enter a note by selecting the note type from the drop down list, entering the note text in the text field.

14. Click **Create**.

15. Click **Update**.

    Additionally, you can add classification, notes, tasks, interactions, and attachments.

Creating Opportunities (Person)

Steps

Follow these steps to create a new contact or person opportunity:

1. From the **Customer** tab, choose the **Person** subtab.

   The People page opens.

2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name using the % as a wildcard.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

The Person Search page opens.

2. Enter search filter information and display options.

3. Click **Search**.

3. Select a person by clicking the person's link.

   The Person Detail page opens.

4. Click the **Opportunities** link.

   You can select the "Display Contact Opportunities" radio button to display all opportunities for which this person is a contact of the opportunity. You can select the "Display Person Opportunities" radio button to display all opportunities in which the opportunity is for the person.

5. Click **Create**.

   The Create Opportunity page opens.

6. From this page you can enter opportunity details, purchase items, contacts, and notes information. Any field with an asterisk is a required field.

7. Click **Create**.

Notes (Person)

In order to provide better support and service to your customers, you can enter comments into a free form text field that you can archive and share with others in your organization. The Notes tab represents a log of information that is stored about a particular customer, organization, person or relationship, forecast, or opportunity.

- Create a note
- View a note

Creating a Note (Person)

Steps

Follow these steps to create a note:

1. From the **Customer** tab, choose the **Person** subtab.

2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

1. Choose Person from the drop down list.
2. Enter the full or partial name.
3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Person Search page opens.

2. Enter search filter information and display options.
3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person by clicking the person's link.

   The Person Detail page opens.

4. Click the **Notes** link.
5. Select a Type from the drop down list.

   You can change the default type by changing the Profile. Click the Profiles icon in the upper right corner of the application page.

6. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
7. Enter your notes in the text box.
8. Click **Create**.

Note: You cannot edit notes once they are created.

Viewing a Note (Person)

Steps

Follow these steps to view a note:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.

2. Enter the full or partial name.

3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Person Search page opens.

2. Enter search filter information and display options.

3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person by clicking the person's name link.

   The Person Detail page opens.

4. Click the **Notes** link.

5. Select a Type from the drop down list.

   The default type can be changed using Profiles.

6. Choose the number of days for which you want the notes history.

7. Click **Apply**.

Note: Your profile set up determines the number of rows that will display in your notes table.

If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

The first characters of the note are displayed in the table. Click the **Text** icon to see the entire note. To view all notes in a printer-friendly format, click the **All Notes** button.

Sales Teams (Person)

Sales teams represent all of the salespeople and partners that have ownership of a specific customer. Sales team members can have full access or non-full access (view only) ownership.

- Add a sales team member
- Add a partner
- Add a resource team

- Remove a sales team member

Adding a Sales Team Member (Person)

Steps

Follow these steps to add a sales team member:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.

   2. Enter search filter information and display options.
   3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Select a person by clicking the person's link.

   The Person Detail page opens.

4. Click the **Sales Team** link.
5. Enter the last name of the sales representative in the Add a Salesperson field.
6. Click **Go**.
7. Choose from the company menu, click **Go**.
8. Click the salesperson link.
9. Click **Update**.

If you want to associate this salesperson with a customer location for the purpose of territory assignment:

1. Enter the territory property.

2. Click **Go**.

Adding a Partner (Person)

Steps

If you want to add a partner to the sales team:

1. From the **Customer** tab, choose the **Person** sub tab.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.

   2. Enter search filter information and display options.
   3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Select a person by clicking the person's link.

   The Person Detail page opens.

3. Click the **Sales Team** link.
4. Enter the partner name in the Add a Partner field, click **Go**.
5. Select a partner from the search results list.
6. Click **Update**.

You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner.

Adding a Resource Team (Person)

Prerequisites

None

Steps

To add a resource team to a sales team, follow these steps:

1. From the Customer tab, select a person:

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name of the person. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The People Search page opens.

   2. Enter search filters and display options.
   3. Optionally enter a Search Name, if you want to save the search.
   4. Click **Search**.
2. Click the person link to select it.

   The Person Detail page opens.

3. Click the **Sales Team** link.
4. In the Add a Resource field, enter the resource name and click **Go**.
5. Select a resource team from the search results page by clicking the link.
6. Click **Update.**

   Each member of the resource team will be added to the sales team table.

Removing a Sales Team Member (Person)

Steps

Follow these steps to remove a sales team member:

1. From the **Customer** tab, choose the **Person** subtab.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.

2. Enter the full or partial name.
3. Click **Go**.

To search using **Advanced Search**:

1. Click the **Advanced Search** link.

   The Person Search page opens.

2. Enter search filter information and display options.
3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Select a person by clicking the person's link.

   The Person Detail page opens.

3. Click the **Sales Team** link.
4. Locate the sales person that you want to remove from the sales team.
5. Select the **Remove** check box.
6. Click **Update**.

Tasks (Person)

Tasks provide a way of tracking current and future customer or opportunity activities by providing a list of action items for a specific date range, as well as maintaining a history of activities. You can create tasks for yourself, assign tasks to others in your organization, and associate tasks with specific opportunities, organizations, people or relationships.

- Create a task
- Maintain task details
- Add an attachment to a task

Creating a Task (Person)

Steps

Follow these steps to create a task:

1. From the **Customer** tab, choose the **Person** subtab.

2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.

   2. Enter search filter information and display options.
   3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person from the Search Results page by clicking the person’s name link.

   The Person Detail page opens.

4. Click the **Tasks** link.
5. Click **Create**.
6. Select Task Type from the drop down list.

   Note: If the task is a private task, select the Private box. This task can only be assigned to you.

7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the person you are assigning the task, click **Go**.
14. The "Relate to" field defaults to the person, click **Go**.
15. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

Maintaining Task Details (Person)

Steps

Follow these steps to view a task:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Select a person from the Search Results page by clicking the person's name link.

   The Person Detail main page opens.
4. Click the Tasks link.
5. Select a task date by clicking the calendar icon.
6. Enter a task name.
7. Select a priority from the drop down list.
8. Select a task type.
9. Select a task status.
10. Indicate the task owner.
11. Include private tasks by selecting the check box.

12. Click **Apply**.

13. Click the task link to view details.

The Task Detail page opens.

The following table describes the Task Detail fields.

Task Detail Fields

Field	Required Field	Description
Task Type	Yes	Select the task type from the drop down list.
Private	No	Select the check box if you want the task to be viewable only by the creator of the task.
Task Name	Yes	Enter the task name.
Task Description	No	Enter a description.
Priority	No	Select priority from the drop down list.
Status	No	Select the task status from the drop down list.
Date	Yes	Select a date by clicking the calendar and choosing a date.
Start Time	No	Select a time from the drop down lists. Start and end time for a task must be on the same day.
End Time	No	Select an end time for the task from the drop down list. Start and end time for a task must be on the same day.
Owner	Yes	Enter the full or partial name, using % as a wildcard, and click **Go**. Select from the search results.
Relate To	No	Select the related item (opportunity, organization, person, quote, or relationship) from the drop down list. Enter the full or partial item name and click Go.

14. Click **Update**.

Interactions (Person)

An interaction is a point of contact and may relate to customers, campaigns, agents, orders, and quotes. This point of contact could be a direct interaction with a customer, the customer's system, a potential customer, or through an automated agent. An interaction is generally timed and has an outcome or result that can be tracked. Multiple activities can occur during the course of a customer interaction.

Sales Online users cannot create or edit interactions.

- View interactions

Viewing Interactions (Person)

Steps

You can view interactions entered by sales, marketing, and service department representatives.

Follow these steps to view interactions:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:

   1. Click the **Advanced Search** link.

      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Select a person from the Search Results page by clicking the person's name link.

   The Person Detail page opens.
4. Click the **Interactions** link.

5. You can select filters such as Media Type, Activity, Handler, and Date Ranges.
6. Click **Apply** to search for interactions.

Note: Sales Online users cannot create or edit interactions.

For more detailed information about interactions, please refer to the *Oracle CRM Foundation Concepts and Procedures* guide.

Attachments (Person)

Attachments are defined as physical documents, URLs, or text. The typical use of attachments is for sharing and storing information about a person, organization, relationship, forecast, task, or opportunity. For example, you can attach written correspondence with a particular organization contact to that contact's record.

- Add an attachment
- View an existing attachment

Adding an Attachment (Person)

Steps

Follow these steps to add an attachment:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select a person.

   The Person Detail page opens.
3. Click the **Attachments** link.
4. Click **Add**.

   The Add Attachment page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

Viewing an Existing Attachment (Person)

To view an existing attachment, click the attachment link from the person's detail page.

Partner Tab

Use the Partner tab to view Sales partners and Exchange partners by selecting from the View By drop down list and clicking Apply.

- Create a partner
- Create a contact

Please refer to the *Oracle Partner Relationship Management Concepts and Procedures* guide for more information.

Creating a Partner

Follow these steps to create a partner:

Steps

1. From the **Partner** tab, click **Create**.

   The Create Partner page opens.

The following table describes the Create Partner fields.

Create Partner Fields

Field	Required Field	Description
Find Partner	No	Find a partner by entering a name, selecting a state and clicking **Go**.
Organization	Yes	Enter the organization.
Alias	No	Enter an alias, if applicable.
Phone Number	No	Enter a phone number.
Phone Type	No	Select a phone type from the drop down list.
Email Address	No	Enter an email address.
Business Line	No	Enter the business line.

Field	Required Field	Description
Customer Category	No	Select a customer category code from the drop down list.
Annual Revenue	No	Select an annual revenue currency from the drop down list and enter the annual revenue.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year established.
Web Site	No	Enter the web site address.
DUNS Number	No	Enter the Dunn and Bradstreet number.
Tax ID	No	Enter the tax identification number.

If you want to enter Address information, the following table describes the Address fields.

Address Fields

Field	Required Field	Description
Address Type	Yes	Select an address type from the list of values.
Primary	No	Select the primary check box if the address is considered the primary address.
Address Line 1	Yes	Enter the address.
Address Line 2	No	Enter additional address information.
City	No	Enter in the city field.
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
County	No	Enter the county.
Country	Yes	Select from the drop down list.
Start and End Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.

Inactive	No	Select the check box to indicate that the partner is inactive.
Site Type	No	Select from the drop down list.
Duns String	No	Dunn and Bradstreet number
Prnt Duns Name	No	

To enter partner details, use the following table to identify the Partner Detail fields.

Partner Detail Fields

Field	**Required Field**	**Description**
Relationship Type	No	Select the relationship type from the drop down list.
Start and End Date	Yes	Select dates by clicking the calendar icons and choosing from the calendar.
Partner Level	No	Select from the drop down list.
Purchase Method	No	Select the purchase method from the drop down list.
Preferred VAD	No	Select a preferred value added distributor.
Target Revenue	No	Select a currency from the drop down list and enter the target revenue.
Revenue Year to Date	No	Enter the revenue year to date
Channel Manager Name	No	Enter the full or partial name and click **Go**.
Phone Support Person	No	Enter the full or partial name and click **Go**.
Original System Reference	No	Enter the original system reference.
Original System Type	No	Select from the drop down list.
Enable for Opportunity Exchange	No	Select the check box to enable opportunity exchange.

Field	Required Field	Description
Use in Automatic Matching	No	Select the check box to use in automatic matching.

If you want to add a Person Relationship, the following table describes the Person Relationship fields.

Person Relationship Fields

Field	Required Field	Description
Add a Person	Yes	If you are going to add a person relationship, enter the full or partial name and click the **Go** button.
Erase	No	To erase a relationship from the summary table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.
Last Name	Yes	Enter the last name.
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Addressbook	No	Select an email address by clicking the email addressbook icon.
Job Title	No	Enter a job title.
Decision Maker	No	Select the decision maker check box if the person is a decision maker.

If you want to add an Organization Relationship, the following table describes the Organization Relationship fields.

Organization Relationship Fields

Field	Required Field	Description
Add an Organization	Yes	If you are going to add an organization relationship, enter the full or partial name and click **Go**.

Erase	No	To erase a relationship from the summary table, click the erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Related Organization	Yes	This field holds the name of the related organization.
Start Date	Yes	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

2. Click **Create**.

Creating a Person/Contact

Follow these steps to create a contact:

Steps

1. From the **Partner** tab, click the **Person** subtab.

   From this page you can create new contacts, send collateral to existing contacts, or update contact information.

2. Click **Create**.

   The Create Person page opens.

3. The only required fields are Last Name and First Name, indicated with an asterisk.

   The following table describes each field in the Create Person page.

Create Person Fields

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.
Preferred Name	No	Enter a preferred name, if applicable.
Middle Name	No	Enter the middle name.
Title	No	Select a title from the drop down list.

Field	Required Field	Description
Second Title	No	Enter the second title, if applicable.
Suffix	No	Enter a suffix, if applicable.
Do Not Mail	No	Select the check box to indicate no mail.
Reg Number	No	

4. In the Business Information section, you can enter information which is described in the following table:

Business Information Fields

Field	Required Field	Description
Relationship	No	Select a relationship from the drop down list.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking **Go**.
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.
Role	No	Select a role from the drop down list.
Business Phone	No	Enter a phone number.
Business Email Address	No	Enter an email address.
Start and End Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Select the check box to indicate that the person is a decision maker.
Reference	No	Select the check box to indicate the person can be considered a reference.
Organization	No	Enter the full or partial name and click **Go**.
Mailstop	No	Enter the mailstop.
Department Type	No	Select department type from the drop down list.
Job Title Type	No	Select job title type from the drop down list.
Preferred Language	No	Default is English. Select from the drop down list.

Field	Required Field	Description
Phone Type	No	Select from the drop down list.
Decision Maker	No	Select the check box if the contact is a decision maker.
Reference	No	Select the check box to mark as a reference.
Title Continued	No	Select from the drop down list.
Send Mail To	No	Select from the drop down list.
Preferred Name	No	Enter a preferred name, if applicable.

If you want to add personal information, the following table describes the Personal Information fields.

Personal Information Fields

Field	Required Field	Description
Personal Phone	No	Enter a phone number.
Phone Type	No	Select from the drop down list.
Personal Email	No	Enter an email address.
Address Type	Yes	Select an address type from the list of values.
Address Line 1	Yes	Enter the address.
Address Line 2	No	Enter additional address information.
City	No	Enter in the city field.
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
County	No	Enter the county.
Country	Yes	Select country from the drop down list.
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

Inactive	No	Indicate the contact is inactive by selecting the check box.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.
Site Type	No	Select from the drop down list.
Duns String	No	Enter the Dunn and Bradstreet number.
Prnt Duns Name	No	

5. In the Notes sections, you can enter notes associated with this person.
   1. Select the note type from the drop down list.
   2. Enter text in the Text box.

   You have successfully created a person when the Person Detail Main page opens.
6. Click **Create**.

To find more information about partners, refer to the *Oracle Partner Relationship Management Concepts and Procedures* guide.

Compensation Tab

Sales Online's Compensation tab consists of four subtabs; Planning, Compensation Plan, Income Planner, and Reports. Depending on your sales role, you can use the Compensation tab to do the following:

- View your quota estimate
- Estimate your commissions using Income Planner
- Review commission reports
- Allocate quotas
- Approve compensation plans

For more information about using the compensation functionality in Sales Online, please refer to the *Oracle Incentive Compensation Concepts and Procedures* guide.

Fulfillment Tab

The Fulfillment tab allows you to create and send collateral, through email, to your customers. The 1:1 Fulfillment Wizard will take you through the process of sending collateral. The following section has step-by-step instructions on sending collateral.

Sending Collateral from Fulfillment

Send collateral to your business contacts using this feature.

Steps

Follow these steps to send collateral:

1. From the **Fulfillment** tab, click **Create**.

   The Person Search page opens.

2. Search for a person by entering search filters and clicking **Search**.

   The Fulfillment Wizard page opens.

3. Select a Template from the drop down list.
4. Click **Continue**.
5. Select the Master Document by selecting the check box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Optionally, select an Attachment; and click **Continue**.
8. Select the Output Method from the drop down list, either email or fax, and click Continue.

   The Fulfillment Request Confirmation page opens.

9. Select the Priority from the drop down list, and click **Done**.

To view fulfillment history, click the History subtab and select from the "View" list of values.

Encyclopedia Tab

Sales Online's Encyclopedia tab includes four subtabs; Category, My Channels, Publish, and Administration.

Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories.

Channels can be classified as content or group and their access can be set to public or private. If you do not know the correct channel to use when publishing a document, then MES assigns the document to the correct channel by matching the document attributes to the channel attributes.

For more detailed information on using Marketing Encyclopedia System, please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures Guide*.

Administration Tab

The Administration tab includes three subtabs; Territory, Partner, and Exchange. From the Administration tab, you can do the following:

- Use the Territory Lookup Tool
- View Timeouts
- View Status Codes
- View Attributes
- View Attribute Values
- View User Administration
- View Opportunity Exchange Error Report

Using the Territory Lookup Tool

Steps

Follow these steps to use the Territory Lookup Tool:

1. Enter an organization name, click **Go**.
2. Select an organization from the search results page.
3. Optionally, select a country from the drop down list.
4. Optionally, select a state from the drop down list.
5. Optionally, enter a postal code.

6. Optionally, enter an area code.
7. Click **Search**.

Viewing Timeouts

Steps

Follow these steps to view timeouts:

1. From the Administration tab, click the Partner subtab.
2. Click the Timeouts link.
3. Select a timeout type from the drop down list.
4. Click **Apply**.
5. To remove a timeout setup, select the Remove check box and click **Update**.

Viewing Status Codes

Steps

Follow these steps to view status codes:

1. From the Administration tab, click the Partner subtab.
2. Click the Status Codes link.
3. Select the View By User Type from the drop down list.
4. Click **Apply**.
5. To inactivate a status code, select the Inactive check box and click **Update**.

Viewing Attributes

Steps

Follow these steps to view attributes:

1. From the Administration tab, click the Partner subtab.
2. Click the Attributes link.
3. To remove an attribute, select the Remove check box and click **Update**.

Viewing Attribute Values

Steps

Follow these steps to view attribute values:

1. From the Administration tab, click the Partner subtab.
2. Click the Attribute Values link.
3. Select from the list of attribute values.
4. Click **Apply**.
5. To remove an attribute, select the Remove icon and click**Update**.

User Administration

No help is currently available.

Viewing Opportunity Exchange Error Report

Steps

Follow these steps to run and view the opportunity exchange error report.

1. Enter an Opportunity Name.
2. Enter a Customer Name.
3. Select an Exchanged with Partner
4. Select Exchanged Date Range.
5. Select and Exchange Direction from the list of values.
6. Select an Error Type from the list of values.
7. Click **Go**.

A

Oracle Sales Online Wireless

Oracle Sales Online Wireless provides wireless access to your critical sales information through your wireless device such as a mobile phone. You can update your sales forecast, check your appointments for the day, and review contact and opportunity information for your next appointment without using a computer.

See the following topics:

- Managing Organization Information
- Searching for Organizations
- Editing
- Managing Persons
- Searching for Persons
- Using Sales Tasks
- Managing Your Opportunities
- Searching for Opportunities
- Viewing and Submitting Forecasts

Managing Organization Information

Use the following procedure to view and update organization information.

Steps

1. Select **Organizations** from the Main menu.
2. Search for an organization (see Searching for Organizations). A list of organizations that match your search criteria appears.
3. Select the desired organization from the list. A list of detail information appears.
4. Select a detail from the list to view or edit full details.
5. If you want to see persons related to this organization, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Person.** A list of types of relationships appears.
   c. Select the type of relationship. A list of persons appears.
   d. Select the person to view or edit details.
6. If you want to see organizations related to this organization, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Organization.** A list of types of relationships appears.
   c. Select the type of relationship. A list of organizations appears.
   d. Select the organization to view or edit details.
7. If you want to see opportunities related to this organization, then perform the following steps:
   a. Select **Opportunities.**
   b. Select an opportunity from the list to view details.
   c. If you want to edit an opportunity detail, then select it and enter the information.
   d. If you want to see or edit the line item for an opportunity, then select **Line Details**.

e. If you want to see sales team members for an opportunity, then select **Sales Team.**

Searching for Organizations

Use the following procedure to search for an organization.

Steps

1. On the Organization screen, select **Enter Organization Name.**
2. Enter at least four characters of the organization name.
3. Select **Submit.**
4. Optionally you can narrow the search with a postal code by performing the following steps:
   a. Select **Enter Postal Code.**
   b. Enter the postal code.
   c. Select **Submit.**
5. If you want the search results to include only those organizations that you can access, then select **Search.**
6. If you want to search the whole database, then select **Quick Find.**

A list of organizations appears.

Editing

You can edit information that appears on your screen in brackets by selecting the item and entering or deleting characters. If a screen contains the word *Edit* in the menu at the bottom of the screen, selecting Edit takes you to a screen that itemizes the information and shows the editable portion in brackets.

Managing Persons

Use following procedure to view and update information about persons.

Steps

1. Select **Person** from the Main menu.
2. Search for a persons (see Searching for Persons). A list of persons that match your search criteria appears.
3. Select the desired person from the list. Detail information appears.
4. If you want to see persons related to this person, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Person.** A list of types of relationships appears.
   c. Select the type of relationship. A list of persons appears.
   d. Select the person to view or edit details.
5. If you want to see organizations related to this person, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Organization.** A list of types of relationships appears.
   c. Select the type of relationship. A list of organizations appears.
   d. Select the organization to view or edit details.
6. If you want to see opportunities related to this person, then perform the following steps:
   a. Select **Opportunities.**
   b. If you want to see the opportunities where this person is the organization contact, then select **Contact Opp.**
   c. If you want to see the opportunities where this person is the customer, then select **Person Opp.**
   d. Select an opportunity from the list to view details.
   e. If you want to edit an opportunity detail, then select it and enter the information.

f. If you want to see or edit the line item for an opportunity, then select **Line Details**.

g. If you want to see sales team members for an opportunity, then select **Sales Team.**

Searching for Persons

Use the following procedure to search for persons.

Steps

1. On the Person screen, select one of the following choices:
   - Enter Last Name
   - By Organization Name
2. Enter at least four characters.
3. Select **Submit.**
4. Optionally narrow your search criteria by performing the following steps:
   a. Select Enter First Name.
   b. Enter one or more characters.
   c. Select **Submit.**
5. If you want the search results to include only those persons that you can access, then select **Search.**
6. If you want to search the whole database, then select **Quick Find.**

A list of persons appears.

Using Sales Tasks

Use the following procedure to check your appointments and other tasks for the day.

Steps

1. Select **Tasks** from the Main menu. A list of your tasks for the current day appears.
2. Select a task to view or update the task details.

3. If you want to update detail information, then select the detail and change the information.
4. Save any changes.

Managing Your Opportunities

Use the following procedure to quickly view critical opportunities.

Steps

1. Select **Opportunity** from the Main menu.
2. Search for opportunities. (See Searching for Opportunities.)
3. Select the desired person from the list. Detail information appears.
4. If you want to update opportunity information, then edit any bracketed field in the opportunity detail screen.
5. If you want to see or edit the line item for an opportunity, then select **Line Details**.
6. If you want to see sales team members for an opportunity, then select **Sales Team.**

Searching for Opportunities

Use the following procedure to search for opportunities.

Steps

1. On the Opportunity screen, select one of the following choices:
   - Enter Customer Name
   - Enter Opportunity Name
2. Enter at least four characters.
3. Select **Submit.**
4. If you want the search results to include only those opportunities that you can access, then select **Search.**
5. If you want to search the whole database, then select **Quick Find.**

A list of opportunities appears.

Viewing and Submitting Forecasts

Use the following procedure to quickly view your forecast or the forecasts of people who directly report to you and to submit forecasts.

Steps

1. Select **Forecast** from the Main menu.
2. Select your forecast. Details appear.
3. If you want to update and submit your forecast, then perform the following steps:
   a. Select the field to edit**.**
   b. Enter the new information.
   c. Click **Submit.**
   d. Select **Submit.**
4. If you want to view forecasts for your directs, then select **Directs** from the Forecast menu and select the person's name.