Oracle® Field Sales/Laptop

Concepts and Procedures

Release 11*i*

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Contents

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Preface

This Concepts and Procedures Guide provides information and instructions to help you work effectively with Oracle Field Sales/Laptop, Release 11*i*.

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

Introduction to Oracle Field Sales/Laptop

Oracle Field Sales/Laptop 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. Field Sales/Laptop enables the management of business data using the Trading Community Architecture (TCA) customer model. TCA enables Field Sales/Laptop to support complex relationships which further allows Field Sales/Laptop users to provide exceptional service to customers.

Intended Audience

This guide is aimed at the following users:

- Sales Representatives
- Sales Managers
- Sales Executives

Structure

This manual contains the following chapters:

"Understanding Oracle Field Sales/Laptop" 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 Field Sales/Laptop" 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 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 Field Sales/Laptop

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 Field Sales/Laptop more completely.

Links to Topics

- Understanding Trading Community Architecture
- Understanding Mobile Device Gateway
- Overview of Functionality
- About Navigating Through Field Sales/Laptop
- Using Field Sales/Laptop
- Logging On to Field Sales/Laptop
- Starting Field Sales/Laptop
- Using Your Home Page
- Synchronizing Field Sales/Laptop
- Activity Tab
- Opportunity Tab
- Customer Tab

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.

- Understanding Trading Community Architecture
- Understanding Mobile Device Gateway
- Overview of Functionality

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Understanding Trading Community Architecture

The Field Sales/Laptop customer model is based on 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. 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. Even though the appliance manufacturer may not even have direct relationships with all the members of its trading community, it is important that he know about these entities and how they relate to others within the trading community.

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Understanding Mobile Device Gateway

The Mobile Device Gateway (MDG) is a middle-tier server that acts as the interface between the CRM enterprise database and the Field Sales/Laptop and Palm applications. It is designed using a three tier architecture, allowing for scalability and strategic deployment of the server for data load balancing. Gateway servers can be located in remote sales and service offices close to the mobile worker while the server would talk to the main enterprise database over a LAN (local area network) or a WAN (wide area network).

The Mobile Device Gateway allows for management of the various mobile users and mobile devices. In addition, it allows for data synchronization between the

CRM enterprise database and the Mobile application. The gateway also maintains performance statistics and error handling features. In addition to data synchronization, the application can also be published on the device using the Mobile Device Gateway. The Mobile Device Gateway allows the automatic distribution of the mobile application and schema changes.

For more information on the Mobile Device Gateway, please refer to the *Oracle CRM Gateway for Mobile Devices Concepts and Procedures* guide.

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Overview of Functionality

Oracle Field Sales/Laptop includes the following functionality:

Customer and Contact Management

Field Sales/Laptop provides representatives with a complete customer overview at each stage of the sales process, in both Business to Business and Business to Consumer environments. Before contacting a customer, a sales person can review customer information including: open opportunities and an interaction history. Comprehensive customer information allows sales people to better manage their customers and to plan each customer interaction more effectively.

Opportunity Management

Salespeople can use Field Sales/Laptop to manage their deals from creation to close. Field Sales/Laptop can be used to track and update opportunities throughout the sales cycle.

Attachments

Field Sales/Laptop users can view file attachments that are linked to organizations, people, and opportunities. By clicking an attachment link, users launch the corresponding application automatically.

Tasks

Users can create and assign tasks to themselves or other sales team members. Tasks are organized in a work queue and can be sorted by priority, due date, and status.

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About Navigating Through Field Sales/Laptop

The Field Sales/Laptop application is organized by the following major tabs:

- Home
- Activity
- Opportunity
- Customer

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Navigation Tips

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

Navigation Tips Table

Item	How it works
Tab	Main tabs help you to navigate to further features contained within the tab.
Subtab	Subtabs will take you to further details about the main tab.
Link or Hyperlink	Third level navigation links are used to take you to another level of detail.
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, and sort options. You can name the search and save it.

- Go to "Using Field Sales/Laptop"

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Using Field Sales/Laptop

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

- Logging On to Field Sales/Laptop
- Starting Field Sales/Laptop
- Activity Management
- Opportunity Management
- Customer Management (Organizations and People)

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Logging On to Field Sales/Laptop

Follow these steps to log on to Field Sales/Laptop:

1. Enter your user name.
2. Enter your password.
3. Click the **Logon** button.

   The application start page opens.

- Starting Field Sales/Laptop

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Starting Field Sales/Laptop

Click the Field Sales Laptop link to start the application. The Field Sales/Laptop home page opens.

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Using Your Home Page

The Field Sales/Laptop home page displays the most recent changes downloaded from the Enterprise database onto the local database and is the first page you see when you log in. This helps you identify if a new customer or new opportunity was assigned to you. You can go directly to the details of a new record by selecting the customer or opportunity link. The home page is refreshed after each synchronization.

- Synchronizing the Database
- Synchronizing the Application

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Synchronization

Synchronization is divided into two different actions: synchronizing the database and synchronizing the application. Field Sales/Laptop is designed to make data synchronization between the laptop and the enterprise server as transparent as possible. The synchronization architecture enables the salesperson to transfer changes quickly through a middle-tier synchronization server called the CRM Gateway for Mobile Devices.

- Synchronizing the Database
- Synchronizing the Application

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Synchronizing the Database

Steps

Follow these steps to synchronize the database:

1. Log out of the Field Sales/Laptop application.
2. Close Web to Go.
3. Navigate to the `consolidatorclient.exe` file.
4. Double-click `consolidatorclient.exe` to start the application.
5. Enter the user name, password, and the IP address of the Mobile Device Gateway.

   You can save the user name and password by selecting the Save check box.

6. Click **Sync**.

After you complete the synchronization, you can log in to Field Sales/Laptop.

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Synchronizing the Application

Steps

Follow these steps to synchronize the application:

1. Log off Field Sales/Laptop.
2. Select the **Go Online** tab in the **Web to Go** workspace.
3. Select the **Go Offline** tab after the workspace changes.
4. This will synchronize the new pages onto your laptop.

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Activity Tab

You can use the Activity tab to manage your tasks.

From the Activity tab you can perform the following functions:

- Create a task
- View and maintain task details
- Search for a task

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Creating a Task

Steps

Follow these steps to create tasks:

1. Click the **Activity** tab, to display the Tasks Summary page.
2. Click **Create.**
3. Select a **Task Type** from the drop down list.
4. Enter a **Task Name.**

5. Optionally, enter a **Task Description.**
6. Optionally, select a **Priority** from the drop down list.
7. Select a **Status** from the drop down list.
8. Select a date by clicking the **Calendar** icon.
9. Select a **Relate to** from the drop down list and enter the partial name, and click **Go.**
10. Click **Create.**

Note: Fields marked with an asterisk are required to create a new task.

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Viewing and Maintaining Task Details

Steps

Follow these steps to maintain or view task details:

1. From the **Activity** tab, select the **task name by clicking the link.**
2. Add or update information.
3. Click **Update.**

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Searching Tasks

Steps

Follow these steps to search tasks:

1. From the **Activity** tab, select **Advanced Search.**

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

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

      The Task Search page opens.
   2. Enter **Task Information.**
   3. Click **Search**.

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Opportunity Tab

The first step in the Oracle Field Sales/Laptop 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 the sale.

You can perform the following functions from the opportunity tab:

- Create, maintain, and search opportunities
- Create and maintain sales credits
- Create and maintain contacts
- Create and maintain notes
- Create and maintain sales teams
- View attachments
- Create and maintain tasks

Once opportunities are 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 credit toward sales quotas after closing a sale

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 must add other sales team members, assign sales credits, and rate the likelihood that the opportunity will succeed.

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Creating an Opportunity

Steps

Follow these steps to create an opportunity:

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

2. Click **Create**.

   The Create Opportunity page opens.

3. Enter the full or partial name of the organization or person you want to find, click **Go**.

   The Select a Customer page opens.

4. Select a customer link or address link OR click **Cancel** to return to the previous page.

5. If you do not find the customer that you are looking for, go to the **Customer** tab and click the **Create Organization** button.

6. Enter an opportunity name, this value is used throughout Oracle Field Sales/Laptop to select and view opportunities.

7. Optionally, enter purchase items by selecting a Product Category and Amount.

8. Add an existing person, as a contact, by entering the last name in the Add a Person Field and click **Go**.

9. 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 comments in the Text box.

10. Click **Create**.

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

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Maintaining Opportunity Details

Steps

Follow these steps to maintain opportunity details:

1. From the **Opportunity** tab.

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

   - Using Quick Find, choose Opportunity from the drop down list. Enter a partial name, click Go. Select the opportunity from the list of results.

   - From the Opportunity Summary page, choose an opportunity from the list by clicking the opportunity name link.

- From the Opportunity Summary page, click the Advanced Search link. Enter your search criteria and click Search.

  The Opportunity Detail Main page opens.

3. Add or update information, and click **Update**.

From the Opportunity Detail page, you can click a link to maintain Contacts, Notes, Sales Team, and Attachments.

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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 a partial name for the opportunity, and 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**.

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Sales Credits (Opportunity)

Use this feature to distribute sales credits to sales people 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 must total 100% of the purchase item line, and Other Credits can equal any amount.

- Distribute sales credits
- Add a person to receive sales credits

- Add a partner to receive sales credits

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Distributing Sales Credits (Opportunity)

Steps

Follow these steps to distribute sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 link.

   The Opportunity Detail page opens.
3. From the Purchase Items table select the line to split.
4. Click the **Split** button.
5. Enter a salesperson, or search for a salesperson, in the Salesperson field.
6. Enter the credit amount or percentage. The total percentage must equal 100%.
7. Click **Update**.

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Adding a Person to Receive Sales Credits (Opportunity)

Steps

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

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 link.

   The Opportunity Detail page opens.

3. From the Purchase Items table, click the **Split** button.
4. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
5. Select an employee by clicking the employee name link.

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Adding a Partner to Receive Sales Credits (Opportunity)

Steps

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

1. From the **Opportunity** tab, select the **Opportunity** subtab.

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 link.

   The Opportunity Detail page opens.

3. From the Purchase Items table, click the **Split** button.
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.

To enter Other Credits, choose a credit type from the drop down list, click **Update**.

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

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Adding New Contacts (Opportunity)

Steps

Follow these steps to add a new contact:

1. From the **Opportunity** tab, search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 an opportunity link to select it.

   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**.

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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 a particular customer, organization, person, relationship, or opportunity.

- Create a note
- View a note

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Creating Notes (Opportunity)

Steps

Follow these steps to create a note:

1. From the **Opportunity** tab, search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 an opportunity link to select it.

   The **Opportunity Detail** page opens.
3. Click the **Notes** link.
4. Select a Type from the drop down list.
5. Enter your notes in the Text box.
6. Click **Create.**

Note: You cannot edit notes once they are created.

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Viewing Notes (Opportunity)

Steps

Follow these steps to view a note:

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 Notes link.

   Scroll down to the Notes History section.

4. Select a Type from the drop down list.
5. Choose the date range for which you want the notes history.
6. Click **Search**.

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.

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Sales Teams (Opportunity)

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. Unless a salesperson has an "Account

Manager" role, they have access only to the records for which they are on the sales team. However, a salesperson can be part of a sales team in more than one way. For example, a sales person can have a manager role and be a regular salesperson for the same customer or opportunity.

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

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Adding a Sales Team Member (Opportunity)

Steps

Follow these steps to add a sales team member:

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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. Choose an 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. Click the salesperson link.
6. Click **Update.**

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Adding a Partner to a Sales Team (Opportunity)

Steps

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

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 Sales Team link.
4. Enter the last name or partial name of the partner in the Add a Partner field, click **Go.**

   It is recommended that you search by last name only.
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. Refer to the *Partner Relationship Management (also referred to as Partners Online) Concepts and Procedures Guide* for more detailed information.

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Removing Sales Team Members (Opportunity)

Steps

Follow these steps to remove a sales team member:

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

   To search using **Quick Find**:

1. Choose Opportunity from the drop down list.
2. Enter a partial name for the opportunity, and 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. Find the salesperson on the table and select the Remove check box.
4. Click **Update.**

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Tasks (Opportunity)

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

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Creating a Task (Opportunity)

Steps

Follow these steps to create a task:

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.
   2. Enter a partial name for the opportunity, and 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 **Tasks** link.
4. Click **Create**.
5. Select **Task Type** from the drop down list.
6. Enter the **Task Name**.
7. Enter the **Task Description**.
8. Choose 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.
11. Enter the name of the person you are assigning to the task; click **Go**.
12. The "**Relate to**" field is defaulted to the opportunity with which you are working.
13. Click **Create**.

When the Task Detail page opens, you have successfully created a task. You can update information from this page.

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Maintaining Task Details (Opportunity)

Steps

Follow these steps to maintain task details:

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

2. Enter a partial name for the opportunity, and click **Go**.

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

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. Add or update information.
4. Click **Update**.

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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, or opportunity. For example, you can attach written correspondence with a particular organization contact, to that contact's record.

- View an existing attachment

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Viewing Existing Attachments (Opportunity)

To view an existing attachment, click the attachments link.

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Customer Tab

The Customer tab is comprised of two subtabs, Organization and Person. Within the tabs, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be equally supported. See "Understanding Trading Community Architecture" for more information.

By default, the Customer tab opens to the Organization page. Click the Person subtab to open the Person page.

Use the Customer tab to create and maintain the following:

- Organizations
- People

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Organization Subtab

Within the Customer tab you will find Organization and Person subtabs. The Organization subtab will help you perform the tasks outlined in the following section.

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

- Create organizations
- Maintain organization details
- Search organizations
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Create and maintain sales team members
- Create and maintain tasks

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Creating a New Organization

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 the **Create** button.
3. Enter the required information and other important information.
   - Address is a required field. You may choose multiple address types if the specific address may serve as the bill to and the ship to address.

- 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.
- If you want to enter organization relationships, you must add an existing organization by entering the partial organization name in the Add an Organization field and clicking Go. You cannot create a new organization on this page.

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 Main Detail page opens. The organization number is generated by the system.

Note: The address you enter on this page becomes the primary address by default.

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Maintaining Organization Details

Steps

Follow these steps to edit an existing organization:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter a partial name of the organization, and 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. To select an organization, click the organization's link.

   The **Organization Detail** page opens.
3. Add or edit information.
4. Before editing or adding address information, click **Update** to save your current changes.

5. Add or edit address.

   By default the address entered on the Create Organization page is the primary address. You can edit addresses by clicking the address link.

   To create a new address, click the Create Address button. Up to three new addresses can be created on the Create Address page.

6. Click **OK** to return to the Organization Detail Main page.

7. Click **Update**.

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Searching for 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 full or partial name for the organization.

   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**.

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Creating and Maintaining Relationships

There are two types of relationships you can create from the Customer > Organization tab, Organization to Organization and Organization to Person. Please refer to the Person subtab section for information about creating Person to Organization and Person to Person relationships.

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Creating an Organization to Organization Relationship

Steps

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

1. From the **Customer** tab, search for an organization:

   To search for an organization using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter a partial name of the organization, and 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 with which you want to create a relationship from the search results page. The organization will populate the related organization field, a required field, on the relationship detail page.
3. Click the **Relationships** link.
4. In the **Add an Organization** field, enter the name, or partial name.
5. Click **Go**.
6. From the Search Results page, click the organization link to select the organization.
7. Choose a **Relationship Type** from the drop down list.
8. Select a start date. This is a required field.
9. Click **Update.**

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Creating an Organization to Person Relationship

Steps

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

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

   To search for an organization using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter a partial name of the organization, and 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. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.

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.
7. Choose a **Relationship Type** from the drop down list.
8. Click **Update**.

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Creating and Maintaining Opportunities

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

Steps

Follow these steps to create a new opportunity:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter a partial name of the organization, and 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. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.

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 edit information regarding Sales Stage, Win Probability, Status, Close Date, and Amount by changing the Display Options on the Opportunity Table Personalization page. Several other display options are on the same page.

5. Click the **Create** button 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.

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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 customer, organization, person, or opportunity.

- Create a note
- View a note

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Creating a Note (Organization)

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 a partial name of the organization, and 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. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.
3. Click the **Notes** link.
4. Select a Type from the drop down list.
5. Enter your notes in the text box.
6. Click **Create**.

Note: You cannot edit notes once they are created.

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Viewing a Note (Organization)

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 a partial name of the organization, and 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. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.
3. Click the Notes link.
4. Select a Type from the drop down list.
5. Choose the date range 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.

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.

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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 to a sales team

- Remove a sales team member

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Adding Sales Team Members (Organization)

Steps

Follow these steps to add a sales team member:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter a partial name of the organization, and 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. Select an organization by clicking the organization link.

   The Organization Detail page opens.

3. Click the Sales Team link.
4. Enter the last name of the sales representative in the Add a Salesperson field.
5. Click **Go**.
6. Choose from the company drop down list, click **Go**.
7. Click the salesperson link, and click **Update**.

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Adding Partners to Sales Teams (Organization)

Steps

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

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

   To search using **Quick Find**:

1. Choose Organization from the drop down list.
2. Enter a partial name of the organization, and 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. Select an organization by clicking the organization link.

 The Organization Detail page opens.

3. Click the Sales Team link.
4. Enter the partner name in the Add a Partner field, click **Go**.

 It is recommended that you search by last name only.

5. Select the partner from the search results list, and click **Update**.

Choose from the list of partners whose organizations are defined as a "sales" partner.

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Removing Sales Team Members (Organization)

Steps

Follow these steps to remove a sales team member:

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

 To search using **Quick Find**:

 1. Choose Organization from the drop down list.
 2. Enter a partial name of the organization, and 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. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.

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

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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 opportunities, organizations, or people.

- Create a task

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Creating a Task (Organization)

Steps

Follow these steps to create a task:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.
   2. Enter a partial name of the organization, and 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. Select an organization by clicking the organization link.

The **Organization Detail** page opens.

3. Click the **Tasks** link.
4. Click **Create**.

   The Create Task page opens.
5. Select Task Type from the drop down list.
6. Enter the Task Name.
7. Enter the Task Description.
8. Choose the **Priority** from the drop down list.
9. Select the **Status** from the drop down list.
10. Select a planned end date by clicking the calendar icon.
11. Enter the name of the task owner, click **Go.**
12. Select a task owner by clicking the link from the list of search results.
13. 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.
14. Click **Create.**

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

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Viewing Existing Attachments (Organization)

To view an existing attachment, click the attachment link.

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Person Subtab

Within the Customer tab you will find the Person subtab. The Person subtab helps you to perform the tasks outlined below.

The following tasks can be performed from the Person subtab:

- Create a person
- Maintain person details
- Search for a person
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Create and maintain sales teams
- Create and maintain tasks
- View attachments

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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**.
3. Enter business information, personal information, and notes.

   An asterisk indicates a required field.
4. Click **Create**.

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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 search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the partial name of the person, and 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. Click **Search**.

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

   The **Person Detail** page opens.

3. Add or edit information.
4. Optionally, enter phone number and email address.
5. Click **Update**.

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Searching for a Person

Steps

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

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

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the partial name of the person, and 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. Click **Search**.

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Creating and Maintaining Relationships (Person)

From the Person subtab, you can create two types of relationships; Person to Organization and Person to Person. Each relationship is created by clicking the Relationship link from the Customer > Person subtab.

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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.

   The People page opens.

2. Search for a person by selecting Person from the Quick Find drop down list, entering the full or partial name of the person in the Quick Find field, and clicking **Go**.
3. Select from the Search Results page.
4. Click the Relationships link.

To add an organization from the Organization Detail page, follow these steps:

1. From the Person to Organization Relationships section, in the **Add an Organization** field, enter the name, or partial name and click **Go**.

   The Select an Organization page opens.

2. Choose an organization from the list of search results.
3. Choose a **Relationship Type** from the drop down list and select the check box for Decision Maker and Reference, if applicable.
4. Click **Update**.

Note: To remove a relationship, select the **Remove** check box, click **Update**.

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Creating a Person to Person Relationship

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. Search for a person by selecting Person from the drop down list, entering the full or partial name of the person in the Quick Find field, and clicking **Go**.
3. Click the Relationship link.

To add a person from the Person Detail page, follow these steps:

1. In the Person to Person Relationship section, in the **Add a Person** field, enter the name, or partial name and click **Go**.
2. Choose a person from the list of search results.

   The person information will default into the table.

3. Select relationship type from the drop down list, and start and end dates, if applicable.
4. Click **Update**.

Note: To remove a relationship, select the **Remove** check box, click **Update**.

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Creating and Maintaining Opportunities (Person)

Steps

Follow these steps to create a new opportunity:

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 partial name of the person, and 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. Click **Search**.

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

   The **Person Detail** page opens.

3. Click the **Opportunities** link.
4. Click **Create**.

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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 opportunity.

- Create a note
- View a note

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Creating a Note (Person)

Steps

Follow these steps to create a note:

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 partial name of the person, and 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. Click **Search** button.
2. Select a person by clicking the person's link.

   The **Person Detail** page opens.
3. Click the **Notes** link.
4. Select a Type from the drop down list.

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, and click **Create**.

Note: You cannot edit notes once they are created.

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Viewing a Note (Person)

Steps

Follow these steps to view a note:

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 partial name of the person, and 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. Click **Search**.
2. Select a person by clicking the person’s link.

   The **Person Detail** page opens.
3. Click the **Notes** link.
4. Select a Type from the drop down list.
5. Choose the date range for which you want the notes history.
6. Click **Apply**.

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.

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Sales Teams (Person)

Sales teams represent all of the sales people 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 to a sales team
- Remove a sales team member

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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.

   To search using **Quick Find**:

   1. Choose Person from the drop down list.
   2. Enter the partial name of the person, and 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. Click **Search**.

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

   The **Person Detail** page opens.

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

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Adding a Partner to a Sales Team (Person)

Steps

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

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 partial name of the person, and 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. Click **Search**.

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, and click **Go.**

   It is recommended that you search by last name only.

5. Select a partner from the search results list.
6. Click **Update**.

Choose from a list of partners whose organizations are defined as a "sales" partner.

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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 partial name of the person, and 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. Click **Search**.
2. Select a person by clicking the person's link.

   The **Person Detail** page opens.
3. Locate the sales person that you want to remove from the sales team.
4. Select the **Remove** check box.
5. Click **Update**.

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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, or people.

- Create a task

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Creating a Task (Person)

Steps

Follow these steps to create a task:

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 partial name of the person, and 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. Click **Search**.

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

   The **Person Detail** page opens.

3. Click the **Tasks** link.

4. Click **Create**.

5. Select Task Type from the drop down list.

6. Enter the Task Name.

7. Enter the Task Description.

8. Choose the **Priority** from the drop down list.

9. Select the **Status** from the drop down list.

10. Select a planned end date by clicking the calendar icon.

11. Enter the name of the person you are assigning the task, click **Go**.

12. Optionally, select the opportunity, organization, or person you want to relate the task to, click **Go.**

13. Click **Create.**

When the Task Detail page opens, you have successfully created a task. You can edit information from this page.

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Viewing Existing Attachments (Person)

To view an existing attachment, click the attachment link.

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