Oracle® TeleSales

Implementation Guide

Release 11*i*

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Oracle TeleSales Implementation Guide, Release 11*i*

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Preface

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

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

Intended Audience

This guide is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle CRM and ERP applications. You must have an understanding of Oracle CRM and ERP applications before proceeding.

How Implementation Topics are Organized

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

The "Implementing Oracle TeleSales" topic on page 4 lists the major steps in your implementation. Each step is numbered and linked to procedures that give you more detail. Each step must be performed for the application to run properly.

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

Related Documentation and Resources

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

Installing Oracle Applications, Release 11*i*

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 11*i*

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

Oracle Applications System Administrator's Guide

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

Oracle Applications User's Guide

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

Additional Product-Related Documentation

Implementing CRM Applications

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

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

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

Oracle Inventory User's Guide

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

Oracle Marketing Concepts and Procedures

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

Oracle Marketing Encyclopedia Concepts and Procedures

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

Oracle Order Capture Concepts and Procedures

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

Oracle Sales Compensation Implementation Guide

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

Documentation Accessibility

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This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program web site at http://www.oracle.com/accessibility/.

Implementing Oracle TeleSales

Oracle TeleSales is an Oracle Forms-based application for use by call center agents, sales representatives, and sales managers.

Functionality

Oracle TeleSales functionality includes the following:

Customer and Contact Management

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

Opportunity Management

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

Multi-Currency Support

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

Custom Fields

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

New in this Release

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

Automatic Lead Assignment

Oracle TeleSales automatically assigns new leads to agents through the Territory Management module.

Automatic Lead Qualification

Oracle TeleSales automatically qualifies leads based on criteria set by managers. For example, an organization may consider a lead qualified if it has at least a customer name, a purchase time frame, and a budget.

Automatic Lead Ranking

Oracle TeleSales automatically ranks leads based on a score card set up by managers. The score card assigns a set of points for a specific agent entry. For example, the score card assigns more points to leads with high purchase amounts than those with small amounts, and more points to leads with short time frames than those with long time frames. The applications ranks leads based on the total number of points. For example, a lead with 100 to 199 points may be ranked as a medium lead. A lead with 200 to 500 points may be ranked as a hot lead.

Customer Relationship Manager

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

Globalization

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

Tasks and Interactions

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

Collateral Fulfillment

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

Enhanced Territory Management

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

Oracle Business Intelligence System Integration

Oracle TeleSales users can have access to all the operational and intelligence reports provided in the Oracle Business Intelligence System through the Single-Sign-On technology provided by the Oracle E-Business suite.

Application Architecture

The application architecture for Oracle TeleSales is as follows:

Technology Stack

Oracle TeleSales is built on the following technology stack:

- Dataserver (EE + InterMedia all options + Spatial), version 8.1.7.1
- WorkFlow, version 2.5
- Forms, version 6.0.8.14 (patch 5)
- JInitiator, version 1.1.8.11
- MS Internet Explorer, version 5.0

Dependencies

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

- Oracle CRM Foundation Components including Interaction History, Resource Manager, Territory Manager, Task Manager, Notes, 1-to-1 Fulfillment
- Oracle Universal Work Queue
- Oracle Core Sales
- Oracle Marketing Online
- Oracle Order Capture

Implementing Oracle TeleSales

The steps below outline the necessary steps required to successfully implement Oracle TeleSales. Follow the hyperlink in each step to go to the details of each step given later in the document.

Prerequisites

Successful installation of CRM Family Pack 1.

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

- *Oracle System Administrator's Guide*
- *Implementing CRM Applications Release 11i*

User creation and assignment of Oracle Sales Administration Responsibility and System Administrator responsibility. All of the Oracle TeleSales implementation tasks can be completed using these responsibilities.

Steps

1. Implement Oracle ERP applications.
2. Create locations and organizations.
3. Create employees.
4. Set up users, security, and reporting hierarchy.
5. Set up CRM Foundation Notes module.

6. Set up the tracking of interactions.
7. Set up CRM Foundation Tasks module.
8. Set up CRM Foundation Calendar module.
9. **Set up CRM Foundation Fulfillment module**.
10. Set up CRM Foundation Territory Management module.
11. Set up CRM Foundation Order Capture.
12. Set up CRM Foundation Universal Work Queue.
13. Set up marketing campaigns in Oracle Marketing Online.
14. Set up events in Oracle Marketing Online.
15. Set up collateral in Oracle Marketing Online.
16. Set up scripting.
17. Enable Advanced Inbound / Outbound telephony.
18. Set up the Profile section of Oracle TeleSales eBusiness Center.
19. Set up lead management.
20. Set up opportunity management.
21. Set up the Quick Menu
22. Set up campaign assignment and wrap-up administration.
23. Set up lead import and import leads.
24. Set up Oracle TeleSales system profiles.
25. Set up Oracle TeleSales lookups
26. Set up flexfields.
27. Set up directory assistance through web services.
28. Set up dialed directory assistance numbers.
29. Run concurrent programs.

Step 1: Implement Oracle ERP Applications

Set up Oracle Inventory and Oracle Receivables according to the steps outlined in *Oracle Inventory User's Guide* and *Oracle Receivables User Guide Release 11i*.

Oracle TeleSales uses inventory items from Oracle Inventory in sales leads and opportunities

It uses Oracle Receivables during the import of sales leads to create parties using word replacement rules. The application uses the location flexfield structure for address validation, for calculating taxes in quotes, and for creation of addresses for parties and accounts.

Step 2: Create Locations and Organizations

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

Reference: *Implementing Oracle HRMS*.

Step 3: Create Employees

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

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

Step 4: Set Up Users, Security, and Reporting Hierarchy

In this step you import the employees from Oracle Human Resources (HRMS), set them up as Oracle TeleSales users and define the roles, groups, and system profiles that determine who gets to view and modify customer and opportunity information. A customer can be either an individual consumer or an organization.

Overview

Who has access to and who gets to modify what information is determined by a combination of responsibilities, system profile options, sales territories, sales teams, and the roles and groups you set up in Resource Manger, a module of the CRM eBusiness Suite foundation. The Resource Manager setup you do here also determines how opportunities are rolled up for reports and forecasting for other applications in CRM sales family. Here is a brief overview of the different elements which affect access to information:

Responsibilities

You can set the system profile options that control the level of access to information in Oracle TeleSales at the responsibility level. That way you can assign different levels of access to whole groups of employees who share the same responsibility.

System Profile Options

System profile options determine the level of access provided by groups, roles, sales teams. Some system profile options can override all other access settings. For example, setting OS: Customer Access to Full means that an employee can update customer information even when they are not on the customer's sales team. Other system profile options merely refine the access set elsewhere. The profile OS: Manager Update Access determines whether the level of access a manager has to subordinates' opportunities and leads, for example.

Sales Teams

Membership on a sales team gives an employee access to the information the sales team is attached to. An employee on an opportunity sales team, for example, gains access to that opportunity.

Sales team members are assigned either by the territory management module automatically or by the creator of the opportunity or customer record. The creator of an opportunity or a customer record is automatically put on the sales team with full modification privileges.

Just how a sales team controls access to information and the ability to modify it is determined by the setting of the profile options OS: Opportunity Access Privilege and OS: Customer Access Privilege. The sales team concept has most impact on employee access to information when the setting of these system profile options is Sales Team.

Oracle TeleSales users can refine the levels of access sales teams give within the eBusiness Center. The opportunity sales team tab on the Opportunity Center window includes the Full Access check box which becomes important when the system profile OS: Opportunity Access Privilege is set to Sales Team. In this case, selecting the Full Access check box next to a sales team member on an opportunity gives that employee the ability to update that specific opportunity. Members with an unselected check box have read-only access.

The sales team tabs for both consumers and organizations (located in the Organizational Detail and Person Detail windows) include the Role field. Selecting the role of Account Manager gives a sales team member the ability to view all of the opportunities and leads for the customer. The default setting of the Role field is controlled by the system profile option OS: Customer Sales Team Default Role Type.

Note: The role you assign a customer sales team member is not the same role you assign an employee using the Resource Manager. The two role types serve different functions.

Sales Lead Assignment

An employee that has been assigned a sales lead has the ability to view and modify that lead. Leads can be either assigned by the lead creator or automatically via Territory Management, a module of the CRM eBusiness Suite foundation.

Members of the sales team for a specific customer who are assigned the role of Account Manager can view all leads for that customer regardless who these leads are assigned to. The default setting for this role is controlled by the system profile option OS: Customer Sales Team Default Role Type.

Other employees can access and modify the leads depending on the setting of the system profile OS: Lead Access Privilege. If the setting of this profile is Full, then all employees can access and modify the lead. If the profile is set to Sales Team, then nobody else can view and modify the lead except the employee to whom that lead is assigned and the Account Manger as described above. A setting of prospecting allows everyone to view the lead, but permits only the individual assigned a lead to modify it.

The Territory Management Module

The Territory Management module, which you set up in a separate step, affects access to information by assigning leads to individual employees and employees to opportunity and customer sales teams. It controls access to information only to the extent sales teams do.

Groups (Resource Manager)

Groups are the building blocks you use in Resource Manager to build the hierarchy of employees that mirrors that of your sales organization. The hierarchy you build determines:

- How opportunity information is rolled up.

  Selecting a group assignment in the eBusiness Center determines where an opportunity an employee creates gets reported.

- Access to information created by subordinates.

  An employee with the role of TeleSales Manager assigned to a group in the hierarchy gains access to customer, lead, and opportunity information created by individuals in that group and in subordinate groups.

Employees with the TeleSales Administrator role can be given the same access to information as TeleSales Managers by setting the system profile option OS: Sales Admin Update Access set to Update data. A setting of Inherit data means the administrator can update the same customers and opportunities as the manager's subordinates.

Roles (Resource Manager)

There are three seeded Oracle TeleSales roles. You must assign at least one of these roles to every employee using Resource Manager.

Note: The role you assign to an employee in Resource Manager has nothing to do with the role you assign the employee as member of a customer's sales team.

Here are the three available roles:

- **TeleSales Administrator**: Users with this role can view customers, leads, and opportunities created by members of their group and opportunities for all subordinate groups. A user with this role cannot create customers, opportunities, or sales leads. Whether the TeleSales Administrator can modify any existing data depends on the setting of the profile option: OS: Sales Admin Update Access.
- **TeleSales Manager**: Allows users with this role access to all opportunities, leads, and customer information accessible to their group and all of the groups subordinate to this one in the hierarchy. Whether a TeleSales Manager can update information created by subordinates depends on the setting of the system profile option OS: Manager Update Access.
- **TeleSales Agent**: Allows users with this role to view lead, opportunity, and customer information depending on the setting of profiles OS: Customer Access Privilege, OS: Sales Leads Access Privilege, and OS: Opportunity Access Privilege. For example, if the setting of Opportunity Access Privilege is Sales Team Access then the agents can modify opportunity information provided they are on that opportunity's sales team and designated as having full access.

Examples

Imagine that your sales organization consists of two sales representatives: Sue Pierce and George Ramos. Ms. Pierce is also Mr. Ramos' manager.

As Ms. Pierce is both a manager and a sales representative, you assign her both the TeleSales Manger and TeleSales Agent responsibilities. Mr. Ramos is not a manager so he gets only the TeleSales Agent responsibility.

Using Resource Manager, you assign the TeleSales Manger and TeleSales Agent roles to Ms. Pierce and the TeleSales Agent role to Mr. Ramos. As there is only one level of reporting hierarchy in this sales organization, you create only one group, Global Sales, with both sales representatives.

If you have an employee with the role of TeleSales Manager in a group that person automatically becomes the manager of the other employees in the same group. If you have set up a hierarchy of groups, that manager is also the manager of the employees lower in the group hierarchy. You can assign only one individual with the role of TeleSales Manager per group.

The roles and responsibilities and groups set up the basic framework for your security and reporting implementation. The two following examples illustrate how different system profile option settings affect access of employees to data.

Case 1: Full Access for Managers; Restricted Access for Sales Representatives

Suppose you want sales managers to be able to access all leads, opportunities, and customer records, but you want sales agents to be restricted to accessing only information within the sales territories you have set up with the Territory Management module.

To accomplish this, you can set up the two responsibilities TeleSales Manager and TeleSales Agent with different levels of access.

To do so, you set the profiles OS: Customer Access Privilege, OS: Lead Access Privilege, and OS: Opportunity Access Privilege at the responsibility level. The TeleSales Manager responsibility gets a setting of Full. The TeleSales Agent responsibility gets a setting of Sales Team.

When Sue Pierce logs into Oracle TeleSales and selects the TeleSales Manager responsibility, she is granted the rights to view and modify all leads, opportunities, customer data.

The setting of these three profile options to Full overrides all other settings. It does not matter what group and role Ms. Pierce chooses in the eBusiness Center or what the setting the implementer has entered for the system profile option OS: Manager Update Access, Ms. Pierce still retains view and update access to all data.

By contrast Mr. Ramos' access is restricted.Mr. Ramos logs in and must choose the TeleSales Agent responsibility because that is the only one available to him. When he launches the eBusiness Center he must also select a sales group and role that determines how any opportunity he creates is reported to the mangers in the sales group hierarchy. If Mr. Ramos is a member of just one sales group that selection is made for him automatically.

In the eBusiness center Mr. Ramos can only view and modify those leads assigned to him. And he can access opportunities and customers where he is on the sales team. He can modify only those opportunities where the Full Access check box is selected next to his name on the Sales Team tab.

Case 2: Restricted Access for Both Managers and Sales Representatives

Suppose you want to restrict both sales managers and agents to accessing only those leads, opportunities, and customer records within their sales territories.

In this case you set system profile options OS: Customer Access Privilege, OS: Lead Access Privilege, and OS: Opportunity Access Privilege to Sales Team for both the TeleSales Manager and TeleSales Agent responsibilities.

Ms. Pierce logs into the application, selects the TeleSales Manager responsibility, and launches the eBusiness center. If she happens to be a member of multiple sales groups, Ms. Pierce selects the Global Sales group and TeleSales Manager Role. This determines how her opportunities and those of her subordinates are reported to her superiors.

Now Ms. Pierce can access only those customers and opportunities where she is on the sales team and can modify only those where the Full Access check box is selected next to her name.

But because she is a manager in the sales group, Ms. Pierce can also view all information Ramos can access. Her level of access can be increased by setting OS: Manager Update Access. A setting of Update gives her rights to update Ramos' opportunities and customers even if he has view-only access. A setting of Inherit gives her the ability to update only those opportunities and customers Ramos can.

Ms. Pierce or Mr. Ramos can be given special view privileges that will override any restrictions for a specific customer. For example by placing Ms. Pierce on the sales team for General Foods and assigning her the sales force role of Account Manager gives her the ability to view all leads and opportunities for General Foods regardless of membership on sales teams.

Effects of Different Settings

This section outlines the effect of different settings on access to customer, opportunity, and lead information.

Access to Customer Information

The following table describes the effect of different settings on access to customer information. A customer can be either a consumer (party type of Person) or an organization. This table is organized by the different settings of the profile option OS: Customer Access Privilege as this profile option has the biggest impact on access to customer data.

OS: Customer Access Privilege Setting	Who Can View	Who Can Create	Who Can Update
Full	Employees with any TeleSales role can view all customers.	Employees with TeleSales Manager and TeleSales Agent roles can create customers. The TeleSales Administrator role cannot create customers.	Employees with any TeleSales role can update all customers.
Prospecting	Employees with any TeleSales role can view all customers.	Employees with TeleSales Manager and TeleSales Agent roles can create customers. The TeleSales Administrator role cannot create customers.	Employees with any TeleSales role can update customer information provided they are on the sales team. Employees with the TeleSales Manager role can access customer information for their subordinates. If OS: Customer Access Privilege is set to Update, the mangers can update any customer information their subordinates can view. If this system profile is set to Inherit, then the managers can only update information their subordinates can update.
Sales Team	Employees with any TeleSales role can view customer information if they are on the sales team.	Employees with TeleSales Manager and TeleSales Agent roles can create customers. The TeleSales Administrator role cannot create customers.	Employees with all TeleSales roles can update customer information provided they are on the sales team. Employees with the TeleSales Manager role can access customer information for their subordinates. If OS: Customer Access Privilege is set to Update, the mangers can update any customer information their subordinates can view. If this system profile is set to Inherit, then the managers can only update information their subordinates can update.

Access to Opportunity Information

The following table shows the different levels of access to opportunity information depending on a variety of system profile settings and role assignments. This table is organized by the different settings of the profile option OS: Opportunity Access Privilege as this profile option has the biggest impact on access to opportunity data.

OS: Opportunity Access Privilege Setting	Who Can View	Who Can Create	Who Can Update
Org Full (Full access by HR organization).	Employees with any TeleSales role can view opportunities for their HR organization. All can view any opportunity where they are on the sales team.	Employees with the TeleSales Manager and TeleSales Agent roles can create an opportunity provided they are on the sales team for the opportunity's customer. TeleSales Administrator roles cannot create opportunities.	Employees with any of the three TeleSales Resource Manager roles can update opportunities accessible from their HR organization. All can update opportunities when they are on the sales team and have the Full Access check box selected. Employees with the TeleSales Administrator role and a setting of *Update data* for OS: Sales Admin Update Access can update the same opportunities as the manager. A setting of *Inherit data* means the administrator inherits the updating privileges of the manager's subordinates.
Global Full	All employees with any TeleSales role.	All employees with any TeleSales role.	All employees with any TeleSales role.
Prospecting	All employees with any TeleSales role.	All employees with any TeleSales role.	Employees with the TeleSales Agent role can update the opportunity provided they are on the sales team with the Full Access check box selected. Employees with the role of TeleSales Manager and the OS: Manager Update Access set to *Update data* can update the opportunities accessible to subordinates. A setting of *Inherit data* means they inherit the view and update privileges of their subordinates.

Sales Team	Employees with the role of TeleSales Agent can view an opportunity only when they are on the sales team. Employees with the TeleSales Manager or TeleSales Administrator roles can view the opportunity regardless of whether or not they are on the sales team provided a subordinate is on the sales team. Employees on the customer's sales team who have been assigned the role of Account Manager can view the opportunity regardless of whether they are on the opportunity sales team or not.	Employees with the role of TeleSales Agent can update the opportunity only when they are on the sales team and the Full Access check box is selected.	Employees with any TeleSales role can update an opportunity provided they are on the opportunity sales team. Employees with the role of TeleSales Manager and the OS: Manager Update Access set to *Update data* can update the opportunities accessible to subordinates. A setting of *Inherit data* means they inherit the view and update privileges of their subordinates.

Access to Sales Leads

The following table shows the different levels of access to lead information depending on a variety of system profile settings and role assignments. This table is organized by the different settings of the profile option OS: Lead Access Privilege as this profile option has the biggest impact on access to lead data.

Note: Access to leads is set up in very much the same way as access to opportunities with two major differences:

- Leads are assigned to individuals not to sales teams.
- OS: Lead Access Privilege does not have a setting of Org Full (Full access by HR organization).

OS: Lead Access Privilege Setting	Who Can View	Who Can Create	Who Can Update

Full	Employees with any TeleSales role can view all leads,	Employees with the TeleSales Manager and TeleSales Agent roles can create a lead provided they are on the sales team for the lead's customer. The TeleSales Administrator role cannot create leads.	Employees with any TeleSales role can update all leads.
Prospecting	All employees with any TeleSales role can view all leads.	Same as above.	An employee who has been assigned the lead can update it.
Sales Team	Employees with the TeleSales Agent role can view a lead only when it is assigned to them. Employees with the TeleSales Manager or TeleSales Administrator roles can view leads that have been assigned to one of their subordinates. Employees on the customer sales team who have been assigned the role of Account Manager can view leads for that customer regardless of whether the leads have been assigned to them.	Same as above.	An employee who has been assigned the lead can update it. Employees with the role of TeleSales Manager and the OS: Manager Update Access set to Update can update the leads assigned to subordinates. A setting of Inherit, means they inherit the view and update privileges of their subordinates. Employees on the customer sales team who have been assigned the role of Account Manager can update all leads for that customer.

Access to Contact Information, Notes, Tasks, and Interactions

Access to contact information is based on a combination of customer and opportunity access. Access to tasks, notes, interactions, and attachments is based on either customer or opportunity access, whichever is appropriate. For example, if you have access to an opportunity, then you have access to the notes for that opportunity.

4a) Define Resource Groups

Use this procedure to set up resource groups. Resource groups:

- Determine how opportunity and forecast information is aggregated in reports.
- Are one of the factors that control the access by managers to opportunity and customer information maintained by their subordinates.

If you wish managers to access opportunities and customers created by their subordinates, then you must set up a hierarchy of sales groups that mirrors your sales organization.

You can have multiple employees in one group. An employee in a group with the role of TeleSales manger automatically becomes the manager of the other employees in that group and of the employees in the groups below in the hierarchy.

Note: You must not assign more than one employee with the role of TeleSales Manger per group. Doing so will impact the reporting accuracy.

Steps

1. Under the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Groups**.

   The Define Groups window appears.

   Tip: To create a hierarchy of groups, start at the bottom or the top of the hierarchy. This will make it easier to link each group either to the parent group or to its child groups.

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2. For each group in the hierarchy:

   a. Enter the group name.

   Note: If the window is not blank you can create a new record by clicking **New** on the toolbar.

   ---

   b. Enter an optional description.

   c. On the Parent Groups tab, enter the group, if any, that is above the current group in the group hierarchy.

   Note: You need not enter both parent and child groups. If you build your hierarchy by entering parent groups, then you need not enter child groups and vice versa. The missing groups are supplied by the application automatically.

   ---

d. On the Child Groups tab, enter the groups that are below the current group in the group hierarchy.

e. On the Usages tab, use the LOV to enter `Sales and TeleSales`. You must make this entry for the group to be recognized by Oracle TeleSales.

f. Click **Save** on the toolbar.

Reference

For more information on using Resource Manager see *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager, Defining Resource Groups.

4b) Import Employees from HRMS and Assign Them Roles

Use this procedure to import employees from Oracle HRMS.

Prerequisites

You must set up the employees in HRMS first.

Steps

1. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Import Resources** under the Oracle Sales Administrator responsibility.

   The Selection Criterion window appears.

2. Select Employee from the **Resource Category** drop-down list.

3. If you are importing a single employee, then use the List of Values in the Name field. For groups of employees, search by job title, competency, or other search criteria.

4. Click **Search**.

   The employee(s) that match your search criteria are listed below.

5. Select the check boxes for the employees you wish to import as resources into Oracle TeleSales. The next step will assign a single role to each of the selected resources.

6. Click **Create Resource**.

   The Default Values window appears.

7. Use the Role LOV to select one of the three available TeleSales roles to assign to the resource(s):
   - TeleSales Administrator
   - TeleSales Manager
   - TeleSales Agent
8. Click **OK**.

   The Selected Resources window appears. This window displays the list of employees about to be assigned the role.
9. If there are any the employees on the list you do not wish to receive this role, then deselect their Select check box.
10. Click **Save Resource**.

    The Save Resource button grays out indicating that you have successfully imported the resources.
11. If you wish to add additional roles to any of the employees then:
    a. Select the employee.
    b. Click **Details**.

       The Resource window displays information about the employee.
    c. On the Role tab, use the Role Type LOV to select TeleSales.
    d. Use the Role LOV to select the role.
    e. Add any additional role for this employee by repeating the above two steps.
    f. Click **Save** on the toolbar and close the Resource window.
12. Assign sales groups to each employee and select the roles they are going to have in each. For each employee:
    a. Select the employee in the Selected Resource window.
    b. Click **Details**.

       The Resource window displays information about the employee.
    c. In the Group region of the Groups tab, use the Name LOV to assign a group to the employee.

d. Use the Name LOV in the Group Member Role region to select one or more roles for this employee in the group.

e. Click **Save** on the toolbar.

f. Repeat the above three steps for each group you wish the employee to be a member of.

Reference

Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager.

4c) Set Up Employees as Oracle TeleSales Users

Use this procedure to set up individual employees as Oracle TeleSales users.

Steps

1. Log in as System Administrator.
2. Navigate to **Security > User > Define**.

   The Users window appears.
3. Enter a user name and password. You are asked to reenter the password a second time.
4. Use the Person List of Values (LOV) to select the employee that will be using the user name and password.
5. Assign one or more TeleSales responsibilities to the user. Although the responsibilities have the same names as the roles you assigned in previous steps, they control what features of the application a user can access. By contrast, roles control what customer, lead, and opportunity, information users can view and modify. The available options are:
   - TeleSales Agent
   - TeleSales Marketing Agent
   - TeleSales Manager
   - TeleSales Administrator
6. Click **Save** in the toolbar.

4d) Set Up Access System Profile Options

Use this procedure to set the system profile options which, in combination with the role and group each employee is assigned to, determine what information a user can view and modify.

Note: Do not use invalid access profile combinations. You cannot restrict users from accessing customer information and yet allow them access that customer's leads and opportunities. You cannot set OS: Customer Access Privilege to Sales Team and OS: Opportunity Access Privilege or OS: Lead Access Privilege to Full or Prospecting. The application does not check for erroneous settings automatically. You must run the concurrent program Setup Checking for Sales Applications and view the error log.

Prerequisites

Familiarity with system profiles and concurrent programs.

Steps

1. Navigate to **Profile > System**
2. Set the following profile options (for detailed information of available settings, see the table of system profile options provided in this guide):
   - OS: Customer Access Privilege
   - OS: Opportunity Access Privilege
   - OS: Lead Access Privilege
   - OS: Manager Update Access
   - OS: Sales Admin Update Access
3. Run the concurrent program Setup Checking for Sales Applications under the Oracle Sales Administrator responsibility. Enter `No` when the Parameters window prompts you with the question: "Only for 11*i* upgrade?".

   This concurrent program checks for any inconsistencies in the setting of access privilege system profiles. The program generates a log file with any errors, such as missing or invalid profile settings.

   The following table lists the possible error messages:

   - No directory defined in utl_file_dir

- Default value is missing in profile ’OS: Customer Access Privilege’
- Default value is missing in profile ’OS: Sales Lead Access Privilege’
- Default value is missing in profile ’OS: Opportunity Access Privilege’
- Invalid combination of access privilege profiles.

  You cannot set OS: Customer Access Privilege to Sales Team and OS: Opportunity Access Privilege or OS: Lead Access Privilege to Full or Prospecting.
- Default value is missing in profile ’OS: Manager Update Access’
- Default value is missing in profile ’OS: Sales Admin Update Access’
- Default value is missing in profile ’OS: Default Opportunity Status’
- Default value is missing in profile ’OS: Default Opportunity Win Probability’
- Default value is missing in profile ’OS: Default Opportunity Sales Stage’
- Profile ’OS: Default Opportunity Sales Stage’ has an invalid value
- Default value is missing in profile ’OS: Default Close Date Days’
- Currency ’xxx’ should be defined in FND lookup with lookup_type ’REPORTING_CURRENCY’
- Default value is missing in profile ’OS: Forecast Sales Credit Type’
- Default value is missing in profile ’OS: Compensation Sales Credit Type’
- Default value is missing in profile ’OS: Default Sales Channel’
- Default value is missing in profile ’OS: Maximum Roll Days for Converting Amount’
- Default value is missing in profile ’OS: Date Mapping Type’
- Default value is missing in profile ’OS: Daily Conversion Type’
- Default value is missing in profile ’OS: Forecast Calendar’
- No type mapping found in AS_MC_TYPE_MAPPINGS
- Default value is missing in profile ’OS: Preferred Reporting Currency’
- Default value is missing in profile ’JTF_PROFILE_DEFAULT_CURRENCY’
- Default value is missing in profile ’ASO: Product Organization’

- No active Sales Channel in ASO_I_SALES_CHANNELS_V.
- No active revenue credit type found in ASO_I_SALES_CREDIT_TYPES_V.
- No active non-revenue credit type found in ASO_I_SALES_CREDIT_TYPES_V.
- No reporting currency found in FND lookup
- Duplicate records found in AS_FST_SALES_CATEGORIES
- Duplicate records found in AS_PE_INT_CATEGORIES

4e) Set up Default User Role and Sales Group

You can set up a default user role and sales group for each user with multiple groups and roles by setting the system profile option OTS: Default User Role and Sales Group. By setting a default, the user no longer has to choose a role and group each time they launch the eBusiness Center. Users can also set this default up themselves.

Step 5: Set Up CRM Foundation Notes

Oracle Notes is a CRM Foundation component which comes with a set of predefined note types. You may choose whether or not you wish to use the predefined note types and whether you wish to create customized note types of your own.

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

Use the following procedure to set up note types.

Steps

1. Navigate to **Notes Setup> Note Type Setup** under the CRM Administrator responsibility.

   The Application Object Library: Note Types Lookups window appears.

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

Deleting an Existing Note Type

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

Mapping Note Types to a Source

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

Step 6: Set Up Interaction Tracking for Oracle TeleSales

Oracle Telesales can be configured to track interactions and activities for events, opportunities, leads, customers, collateral, and notes. Use this procedure to enable tracking of activities and interactions.

Steps

1. Set up Interaction History according to the Implementing Interaction History section of the *Oracle CRM Foundation Implementation Guide*.
2. Under the TeleSales Administrator responsibility, navigate to Campaign Outcome Assignment.

   The Campaign Outcome Assignment window appears.
3. Setup a default campaign with at least one outcome assigned to it.
4. Set OTS: Telesales Interaction Enabled system profile to *Yes*.

   > **Note:** Setting OTS: TeleSales Interaction Enabled to *No*, disables all activity tracking overriding the setting of system profile options in steps 5 through 11.

5. If you wish to track activities for customers, then set OTS: Generate Customer Activity to *Yes*.
6. If you wish to track activities for leads, then set OTS: Generate Lead Activity to *Yes*.
7. If you wish to track activities for opportunities, then set OTS: Generate Opportunity Activity to *Yes*.
8. If you wish to track activities for collateral, then set OTS: Generate Collateral Activity to *Yes*.

9. If you wish to track activities for events, then set OTS: Generate Event Activity to *Yes*.
10. If you wish to track activities for notes, then set OTS: Note Interaction Activity to *Yes*.
11. Set the profile OTS: Max Interactions Displayed to determine the number of interactions displayed in the eBusiness Center.

Step 7: Set Up CRM Foundation Tasks

Oracle TeleSales functionality is limited to the following:

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

Step 8: Set Up CRM Foundation Calendar

Refer to the Implementing Calendar section of the *Oracle CRM Foundation Implementation Guide* for information about setting up calendar functionality.

Step 9: Set Up CRM Foundation Fulfillment

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

Step 10: Set Up CRM Foundation Territory Management

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

If you are importing leads, you must set the profile *OS: Default Resource ID used for Sales Lead Assignment* to the resource that you wish to handle any leads that are not assigned to any current territory.

Step 11: Set Up CRM Foundation Order Capture

Implement Oracle Order Capture according to the steps outlined in *Oracle Order Capture Implementation Guide*.

Step 12: Set Up Oracle Universal Work Queue

Refer to the *Oracle Universal Work Queue Implementation Guide* for information about setting up the Universal Work Queue.

If you wish to display opportunity, lead, and forecast notes in the Universal Work Queue, please set up the following system profiles to *Yes*:

OTS: Queue: Forecasts (This profile option is defaulted to *No*.)

OTS: Queue: Leads (This profile option is defaulted to *Yes*.)

OTS: Queue: Opportunities (This profile option is defaulted to *Yes*.)

Step 13: Set Up Marketing Campaigns in Oracle Marketing Online

Refer to *Oracle Marketing Online Implementation Guide* and *Oracle Marketing Online Concepts and Procedures* for information on how to set up marketing campaigns. Please note that only active, public, and non-template campaigns are displayed in Oracle TeleSales. A campaign is required for creating leads and tracking interactions.

Step 14: Set Up Events

Use this procedure to set up events.

Prerequisites

- You must complete Step 13 before setting up events.
- You must be set up as a user for Oracle Marketing Online.
- You must have the URL for Oracle Marketing Online.

Steps

1. Set up events according to *Oracle Marketing Online Implementation Guide*.
2. Log on into Oracle applications again as a System Administrator.

3. Navigate to **Profile > System**.
4. Set the following two profile options to *Yes*:
   - AMS: Should Call To Inventory Modules To Be Made
   - AMS: Should Call To Pricing Modules To Be Made
5. Log into Oracle Marketing Online using your web browser. You will need a URL and your Oracle Marketing log-in name and password.
6. Create your events according to the procedure described in *Oracle Marketing Online Concepts and Procedure*s. For each event, you must:
   a. Create a roll-up event.
   b. Create an execution event for that rollup event with these three conditions:
      * The maximum size of the event must be greater than 0.
      * You must enter an inventory item number for the event.
      * You must set up a price for the event.
   c. If you wish TeleSales agents to view notes about the event, then enter them according to the procedure outlined in the Publishing Event Notes on Your Web Site topic of *Oracle Marketing Online Concepts and Procedure*s.
7. Specify the reply to email address for enrollees and the subject line of the email confirmation message by setting the following system profile options:

- OTS: Default Event Reply to Email Address
- OTS: Default Event Subject Line

Step 15: Set Up Collateral

You must complete Step 13 before starting this step.

Follow the procedure outlined in Creating a Deliverable in *Oracle Marketing Online Concepts and Procedure*s to create collateral. Note that collateral is called a deliverable in Oracle Marketing Online.

Specify the subject line of the confirmation email as well as the reply to email address by setting the following system profile options:

- OTS: Default Collateral Reply to Email Address
- OTS: Default Collateral Subject Line

Step 16: Set Up Scripting

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures* to set up scripts for your agents.

Set OTS: Scripting Installation to *Yes* if scripting has been installed for TeleSales.

The following profiles have been obsoleted in this release. All are being replaced by system profiles in Oracle Scripting itself. Please see *Oracle Scripting Implementation Guide* for more information.

Obsoleted Scripting System Profiles
OTS: Scripting Database SID
OTS: Scripting Embedded
OTS: Scripting JNDI
OTS: Scripting Port
OTS: Scripting Server Host Name
OTS: Scripting Three Tier
OTS: Scripting Uses AOL User

Step 17: Enable Call Center/ Advanced Outbound

Follow the instructions in the implementation section of *Oracle Predictive Concepts and Procedures* and *Oracle Telephony Manager Implementation Guide*.

If advanced inbound is installed, then set OTS: Advanced Inbound Installation to *Yes*.

If advanced outbound is installed, then set OTS: Advanced Outbound Installation to *Yes*.

Step 18: Set Up Profile for Oracle TeleSales eBusiness Center

Set up the Profile region of the eBusiness Center header according to the procedures described in *Oracle Service Concepts and Procedures* and *Oracle Service Implementation Guid*e.

To display the Profile region of the eBusiness Center, set OTS: Display Customer Profile to *Yes*.

Step 19: Set Up Lead Management

Setting up leads requires the following steps.

19a) Setting Up Lead Status

Oracle TeleSales comes with a set of predefined lead statuses. These are:

- New
- Qualified
- Unqualified
- Accepted
- Declined
- Sales Opportunity
- Dead Lead
- Loss

Use the following procedure to define alternate statuses. The procedure here is the same as that used to define opportunity status.

Steps

1. Under the TeleSales Administrator responsibility, navigate to **Sales Administration >Opportunities > Status**

   The Define Status Codes window appears.

2. Enter the status code meaning and description for the status. The meaning is displayed on the user interface.
3. Select whether you want the status to apply to opportunities, sales leads, or both by selecting the appropriate checkbox in the Used For region.
4. The Open checkbox determines whether the lead is open or closed. Selecting the check box leaves the lead open and modifiable when set to this status.
5. Select the Enabled checkbox to activate the status.

6. The Win Loss Indicator region indicates whether the deal has been won, lost, or closed. If the open flag is unchecked, then the choices are won, lost, or neither.
7. If you are setting up the status for both leads and opportunities, then select the Used in Forecast checkbox to include the opportunity with this status in the forecast.
8. Use the Usage Indicator drop-down list to select the application families you wish this status to be used in. Selecting All enables the status for all applications.
9. Save your work.

19b): Set Up the Lead Score Card

Use this procedure to create a lead score card or modify an existing one. While you can create multiple score cards, you can have only one score card enabled at one time. You must enable a score card for the whole site.

Note: You cannot modify the rules of a score card while it is in use. You must obsolete it first by entering an end date that is earlier than today's date.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Lead Scorecard.
2. If you wish to create a new score card, then:
   a. Enter a new Description.
   b. Click **Save** in the toolbar.
3. If you wish to add a rule:
   a. Click **Add Rule**.

      The Create/Edit Rule window appears.
   b. Using the Rule LOV, enter the field you wish to use for the calculation.

      The available fields are:
      * Organization: name of an organization.
      * Campaign code
      * Contact role

* Sales channel
* Budget amount
* Time frame
* Budget Status

c. If the field you entered in the previous step requires a range of values, then enter the range in the Low Value and High Value fields.

d. If the field requires only one value, then enter that value in the High Value field only.

e. In the Score field, enter the numerical score for this rule.

f. Click **Save**.

4. If you wish to edit a rule, then select the rule and click **Edit**.
5. If you wish to remove the score card from use, then enter an end date earlier than today’s date.

19c): Set Up Lead Administration

Use this procedure to set up lead administration.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Lead Administration.
2. Select the Rank Mapping tab.
3. Enter the lead score ranges and their ranks.

   The ranges of values determine how the points assigned to each lead by the score card are mapped into lead ranks.

   The greater the number of points assigned by the score card, the hotter the lead. For this reason, assign the low scores to the low lead ranks and the high scores to the hot lead ranks. For example, you may wish to designate a score between 1 to 25 points as a cold lead and a score between 201 and 300 points as a hot lead.

   The range of values cannot overlap.
4. Make sure that the Enabled check box is selected for those rank mappings you wish to use.

5. Click **Save** on the toolbar.
6. Set up required fields for lead qualification:
   a. Log in under the System Administrator responsibility.
   b. Navigate to Profile > System.

      The Find System Profiles window appears.
   c. Enter `OS%Required` in the Profile field.
   d. Click **Find**.

      The System Profile Values window appears.
   e. Setting any of the following profile options to Y requires users to make entries in the corresponding fields before a lead can be turned to the status of qualified:
      * OS: Budget status required
      * OS: Campaign code required
      * OS: Contact phone required
      * OS: Contact Role required
      * OS: Decision Time frame required
      * OS: Project name required
      * OS: Sales channel required
      * OS: total budget amount required
   f. Click **Save** on the toolbar.

19d): Set Up Lead-Related System Profiles

Set up the following system profiles for leads. (For descriptions of individual profile options, see the system profile option table in Step 24).

Lead-Related System Profile Options

User Profile Name
ASO: Product Organization
Default Status
JTF_PROFILE_DEFAULT_ CURRENCY
OS: Customer Address Required for Customer, Opportunity and Sales Lead
OTS: Assign New Lead Manually
OTS: Rank Lead Option

Step 20: Set Up Opportunity Management

Log in as sysadmin responsibility -- go to **profiles>system** to see the default values

Sales representatives can categorize opportunity purchases using three variables.

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

20a) Set Up System Profiles for Opportunities

Set up opportunity-related system profile options (For descriptions of individual profile options, see the system profile option table in Step 24):

Opportunity-Related System Profile Options

User Profile Name
ASO: Default Order Type
ASO: Product Organization
Default Status
JTF_PROFILE_DEFAULT_ CURRENCY
OS: Customer Address Required for Customer, Opportunity and Sales Lead
OS: Daily Conversion Type
OS: Default Close Date Days
OS: Default Opportunity Sales Stage
OS: Default Opportunity Status
OS: Default Opportunity Win Probability
OS: Default Sales Channel
OS: Generate Opportunity System Notes
OS: Inventory Category Integration
OS: Opportunity Probability Link
OS: Opportunity Sales Credit Enforced Sales Team Definition
OS: Sales Team Creator Keep Flag
OSO: Opportunity Probability Link
OS: Allow Updating Frozen Opportunities

20b) Opportunity Status

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

The following statuses are predefined:

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

Use the following procedure to define Opportunity Status.

Steps

1. Under the Sales Administrator responsibility, choose **Oracle Sales Set up > Opportunity > Status**
2. Enter the status code meaning and description for the status. The meaning is displayed on the user interface.
3. The Open checkbox is used to signify whether the opportunity is open or closed. If the checkbox is selected, it means that the opportunity is open.
4. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox in the Used For region.
5. The Win Loss Indicator region indicates whether the deal has been won, lost, or closed. If the open flag is unchecked, then the choices are won, lost, or neither.
6. Select the Used in Forecast checkbox in order to be able to include the opportunity in the forecast.

7. Select the Enabled checkbox to activate the opportunity status.
8. Save your work.

20c) Modify Win Probabilities

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

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

Use the following procedure to define or modify Win Probabilities.

Steps

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

   The Define Win Probabilities Window appears.
2. To enter a new probability:
   a. Click in a **Win Probability** field in a new row.
   b. Enter a Value between 0 and 100.
3. Enter or change the information in the **Meaning** and **Opportunity Status** fields.

   If the profile OS: Opportunity Status Override is set to yes, then changing the win probability will set the status accordingly.
4. Enter a start date in the **From** field. An entry in this field is mandatory.
5. Optionally, enter an end date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
6. Select a usage level (Partner Relationship Management Only, Oracle Sales Only, or All) to determine whether the Win probability will be displayed on the Partners Online screen, the Oracle Sales screen, or both. The default entry is All.
7. Click the Enabled checkbox to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user's interface.
8. Save your work.

20d) Set Up Sales Stages

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

Use the following procedure to define or modify Sales Stages.

Steps

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

   The Sales Stages Window appears.

2. To enter a new Sales Stage:

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

   b. Enter a name to appear in the LOV.

   c. Enter a description

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

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

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

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

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

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

5. Save your work.

20e) Define Credit Types (Order Management)

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

Steps

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

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

20f) Define Interest Types and Codes

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

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

20g)Define Interest Types

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

The Interest Type classification has three layers:

Interest Type

Primary Interest Code
Secondary Interest Code

Use the following procedure to define Interest Types.

Steps

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

   The Interest Types Window appears.

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

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

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

20h) Set Up Interest Codes

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

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

Use the following procedure to create Interest Codes.

Steps

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

   The Interest Category Sets window appears.

2. Enter the I**nterest Type** you wish to set up codes from the List of Values (LOV). The group of checkboxes display where this Interest Type can be used. They are read only and cannot be modified.
3. Click Find to see what codes, if any, have been set up for this Interest Type. The Primary and Secondary Code regions will display the results of the search.
4. In the Primary Codes region, enter the different values desired for the Interest Type. If you are also setting up Secondary Codes, the values entered here will be variables with Secondary Codes as their values.
5. If you are setting up Secondary Codes, click in the **Code** field of the appropriate Primary Code.
6. In the Secondary Codes region, select a blank line and enter a Code and Code Description. If no blank line is available, click the **New Record** button on the toolbar to create one.
7. Save your work.

20i) Defining Inventory Structures

Refer to the *Oracle Inventory User's Guide* for information about defining inventory structures.

20j) Loading Inventory Categories

Inventory Categories are required when using Inventory and other ERP modules. Use this procedure to implement Inventory Categories.

Steps

1. Set the OS: Inventory Category Integration profile to *Yes*.
2. Run the concurrent program Load Interest Types and Codes to Inventory Categories. This program creates the Inventory Categories.
3. Map each inventory item to an inventory category under the Oracle Sales and Marketing Category Set.

   This must be done manually by using Oracle Inventory screens, for details please refer to the *Oracle Inventory User's Guide*.

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

20k) Set Up Multiple Currencies

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

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

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

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

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

Setting Up Default Currency within Oracle TeleSales

Set the system profile option JTF: Default Currency to the currency of your choice.

Entering Daily Conversion Rates

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

Steps

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

   The Daily Rates window appears.

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

Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

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

Steps

1. Set the profile option OS: Forecast Calendar to the calendar your organization is using.
2. Follow the steps for the procedure "Setting Up Conversion Types for Period Types" below to enter the types of conversion rates you will use for each period

type such as fiscal year, month, or quarter for the calendar you selected in step 1.

3. Set system profile OS: Date Mapping Type for Periods by choosing whether you want to use the daily rate from the start or end date of a period for currency conversion.
4. Follow the steps for the procedure "Defining Conversion Rates for Periods" below to search to see if the conversion rates have been entered for your periods. Enter any missing conversion rates.

Setting Up Conversion Types for Period Types

Steps

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

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

Defining Conversion Rates for Periods

Steps

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

   The Pseudo Period Rates window appears.

2. Enter the calendar your organization is using from the LOV in the **Calendar** field. This should be the same calendar set up in OS: Forecast Calendar.

3. Select the **Start Date** or **End Date** radio button. Your selection must be the same as the one you made when you set up the OS: Date Mapping Type for Periods system profile.

4. If you want to modify information only about a single period, enter the period name in the **Period** field. If this field is left blank, the search will display all periods that have daily rates entered for them.

5. Click **Find**.

6. The Period Rates region will display all periods that have the rate values available.

7. If any periods are missing, you will have to add them manually:

   a. Click in an empty **Period** field in the Period Rates Region (or create one by clicking the **New Record** button in the toolbar) and use the LOV to enter a period.

   b. Using the LOV, enter the currency you wish to convert in the **From** field.

   c. Using the LOV, enter the currency you wish to convert to in the **To** field.

   d. Enter the rate in the **Rate** field.

   e. Repeat steps a through d until you have added all the periods you wish to be able to forecast.

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

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

9. Save your work.

Reporting Currency Mapping

Reports are generated using reporting currency.

Steps

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

   The Reporting Currency window opens.

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

Step 21: Set Up The Quick Menu

Set the system profile option Start Menu In Quick Menu to `TeleSales Quick Menu`.

Here is one possible solution for installations that have multiple applications running Quick Menu:

1. Create your own FND Menu. You can do this under the System administrator responsibility by navigating to **Applications > Menu.** See *Oracle Applications System Administrator's Guide* for more details. The menu must include all of the functions you want to use in the applications that use Quick Menu.

   > **Note:** Not all forms can be QuickMenu enabled. This includes the Universal Work Queue.

2. Set the system profile option Start Menu In Quick Menu to the new menu you created.

Step 22: Set Up Campaign Assignment And Wrap-up Administration

22a): Assign Campaigns to Agents

Use this procedure to assign campaigns to agents.

Note: Assigning campaigns to agents is required for Advanced Outbound.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Campaign Agent Assignment.

   The Campaign Agent window appears.

   There are two ways of assigning campaigns to agents:

   - Assign campaigns to individual agents or sales groups using the Resource tab.
   - Assign agents or sales groups to individual campaigns using the Campaign tab.

   Both methods achieve the same result.

2. If you wish to assign campaigns to individual agents or sales groups, then:

   a. Select the Resource tab.

   b. If you wish to assign campaigns to individual agents, then select the Resource radio button.

   c. If you wish to assign campaigns to sales groups, then select the Resource Group radio button.

   d. Click **Search** to the right of the Name field.

   The Teleagent Resource Search window appears.

   e. Enter search criteria.

   f. Click **Find**.

   g. Select one of the agents among the list of results which appear below.

   h. Click **OK** to enter the agent and close the search window.

   i. Click **Find** next to the Campaign Name field.

   j. All of the available campaigns display on the left side of the window.

   k. Use the arrow keys to move the campaigns you wish to assign to the right.

   l. When you are done, click **OK**.

3. If you wish to assign agents or sales groups to campaigns, then:

   a. Select the Campaign tab.

   b. Click **Search** to the right of the Name field.

      The Campaign Search window appears.

   c. Enter search criteria.

   d. Click **Find**.

   e. Select one of the campaigns in the list of results which appear below.

   f. Click **OK** to enter the campaign and close the search window.

   g. If you wish to assign individual agents to the campaign, then select the Resource radio button.

   h. If you wish to assign sales groups to the campaign, then select the resource group radio button.

   i. Click **Find** next to the Name field.

   j. All of the available agents or sales groups appear on the left side of the window.

   k. Use the arrow keys to move the agents or sales groups you wish to assign to the right.

   l. When you are done, click **OK**.

22b): Create Outcomes, Results, and Reasons for Call Wrapup

Use this procedure to create the categories used to track the outcome of agent calls. These categories are used by management to determine agent performance.

There are three types of categories:

- **Outcomes**: Outcomes of the agent activities. For example, the agent makes contact, gets a wrong number, leaves a message, or receives a busy signal.
- **Results**: The results of the outcomes. For example, the agent makes a sale, or fails to make a sale.
- **Reasons**: The reasons for the outcomes. For example, the agent makes a sale because the price is lower than the competition, or the agent fails to make a sale because the customer already has a similar product.

An outcome can have multiple results and a result can have multiple reasons.

After you finish creating the outcomes, results, and reasons, you must link them together using the Outcome Result Reason Assignment window.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Call Wrapup Administration.

   The Call Wrapup Administration window appears.

2. Set up the possible outcomes of agent call interactions. For each outcome:

   a. Select the Outcome tab.

   b. Enter a short code and a short description for the outcome. Both the code and the outcome description are visible to the agent in the List of Values. However, the agent can search only on the code.

   c. If your site is using Advanced Outbound and you wish to recycle calls, you must make a numerical entry in the Legacy Code field. See *Oracle Predictive Concepts and Procedures*

   d. Enter the score and media type. These are free-form text fields. See the Implementing Oracle Interaction History section of the *Oracle CRM Foundation Implementation Guide* for details.

   e. Optionally select the following check boxes:

      * **Positive**: Includes this outcome in reports and queries.
      * **Result Required**: Requires the agent to select a result for this outcome.
      * **Generate Public Callback**: The callback can be rerouted to any agent.
      * **Generate Private Callback**: Generates a callback for the agent who called the customer.

   f. Optionally, enter a description. This description is for administrative purposes only and does not appear in the user interface.

   g. Click **OK** to save the outcome.

   h. If you wish to enter another outcome, then click **New** and repeat this procedure.

3. Enter the reasons for the outcome you created in the previous step. For each result:

   a. Select the Results tab.

b. Enter a short code and a short description for the result. Both the code and the outcome description are visible to the agent in the List of Values. However, the agent can search only on the code.

c. If your site is using Advanced Outbound and you wish to recycle calls, you must make a numerical entry in the Legacy Code field. See *Oracle Predictive Concepts and Procedures*.

d. Enter the score and media type. These are free-form text fields. See the Implementing Oracle Interaction History section of the *Oracle CRM Foundation Implementation Guide* for details.

e. Optionally select the following check boxes:

   * **Positive**: Includes this result in reports and queries.
   * **Reason Required**: Requires the agent to select a reason for this result.
   * **Generate Public Callback**: The callback can be rerouted to any agent.
   * **Generate Private Callback**: Generates a callback for the agent who called the customer.

f. Optionally, enter a description. This description is for administrative purposes only and does not appear in the user interface.

g. Click **OK** to save the result.

h. If you wish to enter another result, then click **New** and repeat this procedure.

4. Create the reasons for the results you have created. For each reason:

a. Select the Reason tab.

b. Enter a short code and a short description for the reason. Both the code and the reason description are visible to the agent in the List of Values. However, the agent can search only on the code.

c. If your site is using Advanced Outbound and you wish to recycle calls, you must make a numerical entry in the Legacy Code field. See *Oracle Predictive Concepts and Procedures*.

d. Enter the score and media type. These are free-form text fields. See the Implementing Oracle Interaction History section of the *Oracle CRM Foundation Implementation Guide* for details.

e. Optionally, select the following check boxes:

   * **Generate Public Callback**: The callback can be rerouted to any agent.

* **Generate Private Callback**: Generates a callback for the agent who called the customer.

f. Optionally, enter a description. This description is for administrative purposes only and does not appear in the user interface.

g. Click **OK** to save the reason.

h. If you wish to enter another reason, then click **New** and repeat this procedure.

22c): Link Outcomes to Results and Reasons

Use this procedure to link together the outcomes, results and reasons you have created in the previous step.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Outcome Result Reason Assignment.

   The Outcome Result Reason Assignment window appears. The window is divided into three panes displaying all of the outcomes, results, and reasons you have created.

2. Assign the results for each outcome:

   a. Select the Current Record Indicator to the left of the outcome. This is the narrow unlabeled field to the left of the Code field.

   b. Select the Assign check boxes for the results to be associated with the outcome.

   c. Click **Save** in the toolbar.

3. Assign the reasons for each result:

   a. Select the Current Record Indicator to the left of the result. This is the narrow unlabeled field to the left of the Code field.

   b. Select the Assign check boxes for the reasons to be associated with the outcome.

   c. Click **Save** in the toolbar.

Guidelines

If you wish to add any additional outcomes, results, or reasons, click **New** and make your entry in the Call Wrapup Administration window using the procedure described in Create Outcomes, Results, and Reasons for Call Wrapup.

Clicking the Details button displays the details of the selected outcome, result, or reason.

22d): Assign Outcomes to Campaigns

Use this procedure to assign outcomes to campaigns. Different campaigns require different outcomes. For example, you may wish to use "leave message" as an outcome for a customer satisfaction campaign, but not for a sales campaign.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Campaign Outcome Assignment.

   The Campaign Outcome Assignment window appears.

2. Select the campaign using the Campaign List of Values (LOV).
3. Assign the outcomes to the campaign by moving the outcomes from the Available to the Assigned list using the arrow keys. For each outcome:

   a. In the Available region, select the outcome.

   b. Click the up arrow button.

      The outcome is added to the list in the Assigned region.

4. Click **Save** on the toolbar.

Guidelines

If you wish to add any additional outcomes, results, or reasons, click **New** and make your entry in the Call Wrapup Administration window using the procedure described in Create Outcomes, Results, and Reasons for Call Wrapup. Remember that you must link any new results and reasons to outcomes before you can use them.

Clicking the Details button displays the details of the selected outcome, result, or reason.

Step 23: Set Up Lead Import and Import Leads

Importing leads into the database requires you to:

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

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

23a) Set Up Lead Import

Use this procedure to set up lead import.

Steps

1. Set up system profile options for lead import.

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

   - HZ: Key Word Count

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

   - HZ: Address Key Length
   - HZ: Postal Code Key Length

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

   - OS: Default Resource ID Used for Sales Lead Assignment

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

2. Set up word replacement rules by logging in under the Receivables Manager Responsibility and navigating to **Setup > Word Replacement Rules**.
3. Run the following concurrent programs:

   - Generate Territory Packages. This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.

- Territory Denormalization Refresh. This program, available by logging in under the CRM Administration responsibility, creates a search index for faster performance of the territory management module. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
- Generate Keys for Fuzzy Match. This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically.

23b) Import Leads from a File or Populate the Lead Interface Table

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

Prerequisites

- You must be familiar with running concurrent programs as described in the *Oracle Applications Systems Administrator's Guide.*
- You must be familiar with Oracle SQL Loader as described in the *Oracle 8i Utilities* guide.
- You must be familiar with running SQL Plus database queries.
- Before importing leads you must successfully run the following concurrent programs:
    - Generate Territory Packages. This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.

* Territory Denormalization Refresh. This program, available by logging in under the CRM Administration responsibility, improves the performance of the territory management module by creating a search index. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
* Generate Keys for Fuzzy Match. This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically.

Steps

1. If you wish to import leads from a file then:
   a. FTP the tab-delimited file with lead data to a directory on the server. The file must have a file name with the extension `.dat` and the structure described in the Guidelines section below.

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

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

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

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

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

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

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

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

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

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

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

Guidelines

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

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

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
IMPORT_INTERFACE_ID	NUMBER	Yes	Yes	as_import_interface_s	
LAST_UPDATE_DATE	DATE	Yes	Yes		
LAST_UPDATED_BY	NUMBER	Yes	Yes		
CREATION_DATE	DATE	Yes			
CREATED_BY	NUMBER	Yes			
LAST_UPDATE_LOGIN	NUMBER	Yes	Yes		
REQUEST_ID	NUMBER				]
PROGRAM_APPLICATION_ID	NUMBER				] The concurrent program] generates these values
PROGRAM_ID	NUMBER				]
PROGRAM_UPDATE_DATE	DATE				]]
IMP_LIST_HEADER_NUMBER	VARCHAR2(30)		Yes		]

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LOAD_TYPE	VARCHAR2(20)		Yes	LEAD_LOAD	Must be in uppercase letters
LOAD_DATE	DATE	Yes	Yes		
LOAD_STATUS	VARCHAR2(20)		Yes	NEW	Must be in uppercase letters
LOAD_ERROR_MESSAGE	VARCHAR2(2000)				
PROMOTION_ID	NUMBER			select source_code_id from ams_source_codes where source_code = <as_import_interface_rec>.promotion_id and active_flag = 'Y’	'Used for creating the sales lead header.
PROMOTION_CODE	VARCHAR2(50)		Yes	select source_code from ams_source_codes where arc_source_code_for = 'CAMP' and active_flag = 'Y'	If promotion_id is null then this is used for creating the sales lead header.
CUSTOMER_ID	NUMBER(15)				
CUSTOMER_NAME	VARCHAR2(255)		Yes		
CUSTOMER_NUMBER	VARCHAR2(30)				
CUSTOMER_STATUS	VARCHAR2(1)			A	Must be uppercase. A stands for active.
CUSTOMER_TYPE	VARCHAR2(30)				Obsolete.
CUSTOMER_PROSPECT_CODE	VARCHAR2(30)				Obsolete.
CUSTOMER_CLASS_CODE	VARCHAR2(30)				Obsolete.
SALES_CHANNEL_CODE	VARCHAR2(30)			select sales_channel_code, sales_channel, description from aso_i_sales_channels_v where enabled_flag = 'Y'	Obsolete.
SIC_CODE	VARCHAR2(30)			ar_lookups.lookup_code where lookup_type = '1987 SIC' and enabled_flag = 'Y’	
ANALYSIS_FY	VARCHAR2(5)			Analysis physical year - no List of Values	

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CUSTOMER_ CATEGORY_CODE	VARCHAR 2(30)			ar_lookups.lookup_code where lookup_type = 'CUSTOMER_CATEGORY' and enabled_flag='Y'	'
CUSTOMER_GROUP_ CODE	VARCHAR 2(30)			Leave this field null.	Obsolete.
CUSTOMER_KEY	VARCHAR 2(50)			Leave this field null.	Obsolete.
CUSTOMER_ SUBGROUP_CODE	VARCHAR 2(30)			Leave this field null.	Obsolete.
FISCAL_YEAREND_ MONTH	VARCHAR 2(30)				Free text format
NET_WORTH	NUMBER				Free text format.
NUM_OF_EMPLOYEES	NUMBER(15)				Free text format.
POTENTIAL_REVENUE_ CURR_FY	NUMBER				
POTENTIAL_REVENUE_ NEXT_FY	NUMBER				
CUSTOMER_RANK	VARCHAR 2(30)				Obsolete.
REFERENCE_USE_FLAG	VARCHAR 2(1)				Obsolete.
TAX_CODE	VARCHAR 2(50)				Obsolete.
TAX_REFERENCE	VARCHAR 2(50)				Obsolete.
THIRD_PARTY_FLAG	VARCHAR 2(1)				Obsolete.
COMPETITOR_FLAG	VARCHAR 2(1)				Obsolete.
YEAR_ESTABLISHED	NUMBER(4)				
ADDR_DO_NOT_MAIL_ FLAG	VARCHAR 2(1)			If set to 'Y', no mails to customer site will be sent.	
URL	VARCHAR 2(2000)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS_ID	NUMBER(15)				
CONT_DO_NOT_MAIL_FLAG	VARCHAR2(1)			If set to 'Y', no mails will be sent to contact.	
ADDRESS_STATUS	VARCHAR2(1)			A	
COUNTRY	VARCHAR2(60)	Yes		select territory_short_name, territory_code, description from fnd_territories_vl	If country is supplied then address1 needs to be supplied and vice-versa.
ADDRESS1	VARCHAR2(240)	Yes			
ADDRESS2	VARCHAR2(240)	Yes			
ADDRESS3	VARCHAR2(240)				
ADDRESS4	VARCHAR2(240)				
CITY	VARCHAR2(60)	Yes		select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'CITY'	
POSTAL_CODE	VARCHAR2(60)	Yes		select min(p.from_postal_code), max(p.to_postal_code) from ar_postal_code_ranges_v p, ar_location_values a where p.location_segment_id = a.location_segment_id and a.location_segment_qualifier | | '' = 'CITY' and a.location_segment_value like 'X%'	
STATE	VARCHAR2(60)	Yes		select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'STATE'	

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PROVINCE	VARCHAR 2(60)	Yes		select distinct location_ segment_description, location_segment_user_ value from ar_location_ values where location_ segment_qualifier = ’PROVINCE’	
COUNTY	VARCHAR 2(60)	Yes		select distinct location_ segment_description, location_segment_user_ value from ar_loaction_ values where location_ segment_qualifier = 'COUNTY’	
SITE_CONTACT_ID	NUMBER(15)				
EMAIL_ADDRESS	VARCHAR 2(240)	Yes			
SEX_CODE	VARCHAR 2(30)				
SALUTATION	VARCHAR 2(60)			No LOV	Use this field for terms used for greeting the contact or for addressing a letter.For example, Excellency.
LAST_NAME	VARCHAR 2(50)				
TITLE	VARCHAR 2(30)			ar_lookups.lookup_code where lookup_type = 'CONTACT_TITLE' and enabled_flag = 'Y'	
FIRST_NAME	VARCHAR 2(40)		Yes	Only first name is required.	
JOB_TITLE	VARCHAR 2(50)	Yes		Free text may not be validated.	
PHONE_ID	NUMBER				
PHONE_NUMBER	VARCHAR 2(25)	Yes			If possible area code should be separated if not the whole number will be stored in number.
PHONE_STATUS	VARCHAR 2(1)		Yes	A	

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PHONE_TYPE	VARCHAR2(30)			ar_lookups.lookup_code where lookup_type = 'PHONE_LINE_TYPE' and enabled_flag='Y'	
AREA_CODE	VARCHAR2(10)				
EXTENSION	VARCHAR2(20)				
LEAD_NUMBER	VARCHAR2(30)				
STATUS_CODE	VARCHAR2(30)			select status_code from as_statuses_b where lead_flag = 'Y' and enabled_flag = 'Y' and usage_indicator in ('ALL','OS')	
SOURCE_PROMOTION_ID	NUMBER			Null.	Not used by the program.
INITIATING_CONTACT_ID	NUMBER				
CONTACT_ROLE_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'LEAD_CONTACT_ROLE'	
CHANNEL_CODE	VARCHAR2(30)			select sales_channel_code from aso_i_sales_channels_v	
BUDGET_AMOUNT	NUMBER				
BUDGET_STATUS_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'BUDGET_STATUS'	
CURRENCY_CODE	VARCHAR2(15)			select currency_code from fnd_currencies where enabled_flag = 'Y'	
DECISION_TIMEFRAME_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'DECISION_TIMEFRAME'	
CLOSE_REASON	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'CLOSE_REASON'	
LEAD_RANK_CODE	VARCHAR2(30)				Obsolete. Do not populate.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PARENT_PROJECT	VARCHAR2(80)				
DESCRIPTION	VARCHAR2(2000)				
STATUS_CODE_1	VARCHAR2(30)				Obsolete.
INTEREST_TYPE_ID_1	NUMBER			as_interest_types_v.interest_type_id where master_enabled_flag = ’Y’	
PRIMARY_INTEREST_CODE_ID_1	NUMBER			as_interest_codes_v.interest_code_id where interest_type_id = <interest_type_id_1>	
SECONDARY_INTEREST_CODE_ID_1	NUMBER			as_interest_codes_v.interest_code_id where parent_interest_code_id = <primary_interest_code_id_1>	You must make an entry if you entered a primary_interest
INVENTORY_ITEM_ID_1	NUMBER			AS_INV_ITEM_LOV_V.INVENTORY_ITEM_ID	
ORGANIZATION_ID_1	NUMBER			AS_INV_ITEM_LOV_V.ORGANIZATION_ID where inventory_item_id = <inventory_item_id_1>	
UOM_CODE_1	VARCHAR2(3)			AS_INV_UOM_V.UOM_CODE where inventory_item_id = <inventory_item_id_1> and organization_id = <organization_id_1>	
QUANTITY_1	NUMBER				
BUDGET_AMOUNT_1	NUMBER				
STATUS_CODE_2	VARCHAR2(30)				
INTEREST_TYPE_ID_2	NUMBER				
PRIMARY_INTEREST_CODE_ID_2	NUMBER				
SECONDARY_INTEREST_CODE_ID_2	NUMBER				
INVENTORY_ITEM_ID_2	NUMBER				
ORGANIZATION_ID_2	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
UOM_CODE_2	VARCHAR 2(3)				
QUANTITY_2	NUMBER				
BUDGET_AMOUNT_2	NUMBER				
STATUS_CODE_3	VARCHAR 2(30)				
INTEREST_TYPE_ID_3	NUMBER				
PRIMARY_INTEREST_ CODE_ID_3	NUMBER				
SECONDARY_ INTEREST_CODE_ID_3	NUMBER				
INVENTORY_ITEM_ID_3	NUMBER				
ORGANIZATION_ID_3	NUMBER				
UOM_CODE_3	VARCHAR 2(3)				
QUANTITY_3	NUMBER				
BUDGET_AMOUNT_3	NUMBER				
STATUS_CODE_4	VARCHAR 2(30)				
INTEREST_TYPE_ID_4	NUMBER				
PRIMARY_INTEREST_ CODE_ID_4	NUMBER				
SECONDARY_ INTEREST_CODE_ID_4	NUMBER				
INVENTORY_ITEM_ID_4	NUMBER				
ORGANIZATION_ID_4	NUMBER				
UOM_CODE_4	VARCHAR 2(3)				
QUANTITY_4	NUMBER				
BUDGET_AMOUNT_4	NUMBER				
STATUS_CODE_5	VARCHAR 2(30)				
INTEREST_TYPE_ID_5	NUMBER				
PRIMARY_INTEREST_ CODE_ID_5	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SECONDARY_ INTEREST_CODE_ID_5	NUMBER				
INVENTORY_ITEM_ID_5	NUMBER				
ORGANIZATION_ID_5	NUMBER				
UOM_CODE_5	VARCHAR 2(3)				
QUANTITY_5	NUMBER				
BUDGET_AMOUNT_5	NUMBER				
INTERACTION_NOTES_1	VARCHAR 2(2000)				
PRIORITY_1	NUMBER(3)				
TODO_DATE_1	DATE				
TODO_START_TIME_1	VARCHAR 2(5)				
ACTIVITY_CODE_1	VARCHAR 2(30)				
INTERACTION_NOTES_2	VARCHAR 2(2000)				
PRIORITY_2	NUMBER(3)				
TODO_DATE_2	DATE				
TODO_START_TIME_2	VARCHAR 2(5)				
ACTIVITY_CODE_2	VARCHAR 2(30)				
INTERACTION_NOTES_3	VARCHAR 2(2000)				
PRIORITY_3	NUMBER(3)				
TODO_DATE_3	DATE				
TODO_START_TIME_3	VARCHAR 2(5)				
ACTIVITY_CODE_3	VARCHAR 2(30)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
INTERACTION_NOTES_4	VARCHAR2(2000)				
PRIORITY_4	NUMBER(3)				
TODO_DATE_4	DATE				
TODO_START_TIME_4	VARCHAR2(5)				
ACTIVITY_CODE_4	VARCHAR2(30)				
INTERACTION_NOTES_5	VARCHAR2(2000)				
PRIORITY_5	NUMBER(3)				
TODO_DATE_5	DATE				
TODO_START_TIME_5	VARCHAR2(5)				
ACTIVITY_CODE_5	VARCHAR2(30)				
INTERACTION_NOTES_6	VARCHAR2(2000)				
PRIORITY_6	NUMBER(3)				
TODO_DATE_6	DATE				
TODO_START_TIME_6	VARCHAR2(5)				
ACTIVITY_CODE_6	VARCHAR2(30)				
INTERACTION_NOTES_7	VARCHAR2(2000)				
PRIORITY_7	NUMBER(3)				
TODO_DATE_7	DATE				
TODO_START_TIME_7	VARCHAR2(5)				
ACTIVITY_CODE_7	VARCHAR2(30)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
INTERACTION_NOTES_8	VARCHAR2(2000)				
PRIORITY_8	NUMBER(3)				
TODO_DATE_8	DATE				
TODO_START_TIME_8	VARCHAR2(5)				
ACTIVITY_CODE_8	VARCHAR2(30)				
INTERACTION_NOTES_9	VARCHAR2(2000)				
PRIORITY_9	NUMBER(3)				
TODO_DATE_9	DATE				
TODO_START_TIME_9	VARCHAR2(5)				
ACTIVITY_CODE_9	VARCHAR2(30)				
INTERACTION_NOTES_10	VARCHAR2(2000)				
PRIORITY_10	NUMBER(3)				
TODO_DATE_10	DATE				
TODO_START_TIME_10	VARCHAR2(5)				
ACTIVITY_CODE_10	VARCHAR2(30)				
LEAD_NOTE	VARCHAR2(2000)	Yes			
MIDDLE_INITIAL	VARCHAR2(10)	Yes			
FAX_NUMBER	VARCHAR2(25)				Area code must be separated, otherwise the whole number will be stored in the number column.
FAX_AREA_CODE	VARCHAR2(10)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
MAIL_STOP	VARCHAR2(60)	Yes			
NUM_ENROLLED	NUMBER(5)			Leave this field null.	Obsolete.
CONFIRMED_FLAG	VARCHAR2(1)			Leave this field null.	Obsolete.
PAYMENT_AMOUNT	NUMBER			Leave this field null.	Obsolete.
NUM_ATTENDED	NUMBER(5)			Leave this field null.	Obsolete.
PROMOTION_NAME	VARCHAR2(240)			Leave this field null.	Obsolete.
STATUS_CHANGE_FLAG	VARCHAR2(1)			Leave this field null.	Obsolete.
VEHICLE_RESPONSE_CODE	VARCHAR2(30)			select lookup_code from as_lookups where lookup_type = 'VEHICLE_RESPONSE_CODE' and enabled_flag = 'Y'	'
SOURCE_SYSTEM	VARCHAR2(250)		Yes	select lookup_code from as_lookups where lookup_type = 'SOURCE_SYSTEM' and enabled_flag = 'Y'	
CONTACT_PARTY_ID	NUMBER				
SECURITY_GROUP_ID	NUMBER				
PRM_SALES_LEAD_TYPE	VARCHAR2(30)				Partner specific.
PRM_EXEC_SPONSOR_FLAG	VARCHAR2(1)				Partner specific.
PRM_PRJ_LEAD_IN_PLACE_FLAG	VARCHAR2(1)				Partner specific.
INCUMBENT_PARTNER_PARTY_ID	NUMBER				Partner specific.
INCUMBENT_PARTNER_RESOURCE_ID	NUMBER				Partner specific.
OFFER_ID	NUMBER				
PRM_IND_CLASSIFICATION_CODE	VARCHAR2(30)				Partner specific.
PARTY_TYPE	VARCHAR2(30)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
BATCH_ID	NUMBER(15)		Yes	as_sl_imp_batch_s.	Batch id of the load. BATCH_ID must be populated in as_import_interface table before running the Import Sales Leads concurrent program.
PARTY_ID	NUMBER(15)			Leave this field null.	
PARTY_SITE_ID	NUMBER(15)			Leave this field null.	
LOCATION_ID	NUMBER(15)			Leave this field null.	
REL_PARTY_ID	NUMBER(15)			Leave this field null.	
SALES_LEAD_ID	NUMBER(15)			Leave this field null.	
ADDRESS_KEY	VARCHAR2(500)			Leave this field null.	
CONTACT_KEY	VACHAR2(80)			Leave this field null.	
JOB_TITLE_CODE	VARCHAR2(30)			ar_lookups.lookup_code where lookup_type = 'RESPONSIBILITY' and enabled_flag = 'Y'	Stores the job title code.
DO_NOT_PHONE_FLAG	VARCHAR2(1)			Valid values are Y (do not phone) or N (OK to phone).	
DO_NOT_FAX_FLAG	VARCHAR2(1)			Valid values are Y (do not fax or N (OK to fax).	
DO_NOT_EMAIL_FLAG	VARCHAR2(1)			Valid values are Y (do not email) or N (OK to email).	
ORIG_SYSTEM_REFERENCE	VARCHAR2(240)				May be populated as <orig_system_code >:: <identifier> example: OTN:10100.
LEAD_RANK_ID	NUMBER(15)			as_sales_lead_rank_vl.rank_id, meaning where enabled_flag = 'Y'	Need not supply if supplied will get validated.
NEW_PARTY_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_LOC_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
NEW_PS_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_REL_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
NEW_CON_FLAG	NUMBER(1)			Leave null.	DO NOT POPULATE
ORIG_SYSTEM_CODE	VARCHAR2(30)				Source application code where the lead originated example: OTN

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

Table Column	Comment
IMP_SL_FLEX_ID	
IMPORT_INTERFACE_ID	
CREATED_BY	
CREATION_DATE	
LAST_UPDATED_BY	
LAST_UPDATE_LOGIN	
LAST_UPDATE_DATE	
ENTITY_NAME	Entity Names that are supported are HZ_PARTIES, HZ_LOCATIONS, HZ_CONTACT_POINTS, HZ_PARTY_SITES, HZ_ORG_CONTACTS, HZ_ORG_CONTACT_ROLES, AS_SALES_LEADS. Lookup Type ENTITY_NAME
VALIDATED_FLAG	

Table Column	Comment
TARGET_OBJ_ID	
SECURITY_GROUP_ID	
REQUEST_ID	
PROGRAM_ APPLICATION_ID	
PROGRAM_ID	
PROGRAM_UPDATE_ DATE	
ATTR_VAL_CATEGORY	
ATTR_VAL_1	
ATTR_VAL_2	
ATTR_VAL_3	
ATTR_VAL_4	
ATTR_VAL_5	
ATTR_VAL_6	
ATTR_VAL_7	
ATTR_VAL_8	
ATTR_VAL_9	
ATTR_VAL_10	
ATTR_VAL_11	
ATTR_VAL_12	
ATTR_VAL_13	
ATTR_VAL_14	
ATTR_VAL_15	
ATTR_VAL_16	
ATTR_VAL_17	
ATTR_VAL_18	
ATTR_VAL_19	
ATTR_VAL_20	

Table Column	Comment
ATTR_VAL_21	
ATTR_VAL_22	
ATTR_VAL_23	
ATTR_VAL_24	
GATTR_VAL_ CATEGORY	
GATTR_VAL_1	
GATTR_VAL_2	
GATTR_VAL_4	
GATTR_VAL_3	
GATTR_VAL_5	
GATTR_VAL_6	
GATTR_VAL_7	
GATTR_VAL_8	
GATTR_VAL_9	
GATTR_VAL_10	
GATTR_VAL_11	
GATTR_VAL_12	
GATTR_VAL_13	
GATTR_VAL_14	
GATTR_VAL_15	
GATTR_VAL_16	
GATTR_VAL_17	
GATTR_VAL_18	
GATTR_VAL_19	
GATTR_VAL_20	

23c): Checking for and Correct Errors in Imported Leads

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

Prerequisite

You must:

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

Steps

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

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

      If there are any records with an error, then the window displays the first record. The status bar at the bottom of the window tells you how many records have errors in all.
4. Navigate to the record you wish to correct.
5. From the drop-down list in the middle of the window, select Error to view any error messages. This error page also tells you when the date and time the error was detected.
6. If you wish to correct an error in customer data, then:
   a. Select Accounts from the drop-down list in the middle of the window.
   b. Make your corrections.

c. Click **Save** on the toolbar.

7. If you wish to correct an error in purchase interest or budget information, then:
   a. Select Leads from the drop-down list in the middle of the window.
   b. Make your corrections.
   c. Click **Save** on the toolbar.
8. Change the Load Status for the record to New.

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

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

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

About Existence Checking

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

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

How the Program Checks for Duplicates

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

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

Customer

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

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

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

Address

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

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

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

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

Contact

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

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

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

Contact Restrictions

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

No existence checking is done.

Contact Points

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

Limitations

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

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

You can not bypass Existence checking.

Step 24: Set Up Oracle TeleSales System Profiles

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

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

Profile options can be set at four different levels:

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

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

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)

- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)

Setting Profile Options

Use this procedure to set or change profile options.

Steps

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

   The Find System Profile Values window appears.

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

   The found profiles are displayed in the System Profile Values window.

5. Click in the field of the profile you wish to set or change.
6. Select a value from the List of Vales (LOV).
7. Click **Save** on the toolbar.

The following table lists the Oracle TeleSales profile names, descriptions, and applicable default values.

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
AMS: Should Call to Pricing Modules to Be Made	Events	Must be set to *Yes* for Oracle TeleSales.	
AMS: Should Call To Inventory Modules To Be Made	Events	Must be set to *Yes* for Oracle TeleSales.	
ASO: Default Order Category	Collateral, events	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.	Order Capture

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
ASO: Default Order Type	Opportunities, collateral	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form launched from the Quote / Order tab.	
ASO: Product Organization	Leads, collateral, opportunities	Inventory organizational identification number used for displaying inventory items.	
Default Status	Leads, opportunities	Default status for new tasks. Setting: all levels.	New
HZ: Address Key Length	Lead import		15
HZ: Key Word Count	Lead import		5
HZ: Postal Code Key Length	Lead import		5
JTF: Default Currency	Leads, opportunities	Default currency for transactions. Setting: all levels	USD
OS: Budget status required	Lead management	A setting of Y requires users to enter a budget status for a lead before that lead can be qualified.	Y
OS: Campaign code required	Lead management	A setting of Y requires users to enter a campaign code for a lead before that lead can be qualified.	Y
OS: Compensation Sales Credit Type	Opportunities	Compensation sales credit type.	
OS: Contact phone required	Lead management	A setting of Y requires users to enter a phone number for a lead contact before that lead can be qualified.	Y
OS: Contact role required	Lead management	A setting of Y requires users to enter a role for a lead contact before that lead can be qualified.	Y
OS: Customer Access Privilege	eBusiness Center, organizations, persons, lookups	**Full:** The user can view and update all customers. Generally, this access is given to super users only. **Prospecting:** Users can view all customers but can update customer information only if they are on the sales team. **Sales Team:** Users can view and modify customer information when they are on the sales team.	Full
OS: Customer Address Required for Customer, Opportunity and Sales Lead	Organizations, persons, leads, opportunities	If set to *Yes*, users must enter an address to create an organization, person, lead, and opportunity.	No
OS: Customer Sales Team Default Role Type	Organizations, Persons	Assigns a role type to a new sales team member if no role is specified by the user.	Account Manager

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Daily Conversion Type	Opportunities	Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types.	
OS: Decision time frame required	Lead management	A setting of Y requires users to enter a time frame for a lead before that lead can be qualified.	Y
OS: Default Close Date Days	Opportunities	Sets the default close date for an opportunity. The automatic close date is the creation date plus the number of days set in this profile.	30
OS: Default Opportunity Sales Stage	Opportunities	Default Sales Stage for new opportunity	Stage 1
OS: Default Opportunity Status	Opportunities	Default Opportunity Status for opportunity	Preliminary
OS: Default Opportunity Win Probability	Opportunities	The default win probability for new opportunities.	10-Prospecting (qualified)
OS: Default Resource ID Used for Sales Lead Assignment	Lead Import	Sets up default resource to receive any imported leads not assigned by the territory management module.	
OS: Default Sales Channel	Opportunities	Default sales channel for new opportunities	Direct
OS: Generate Opportunity System Notes	Opportunities	Determines whether or not notes are automatically generated whenever the opportunity is modified by a user.	Yes
OS: Inventory Category Integration	Opportunities	When set to *Yes*, this system profile uses product categories from inventory for the interest types.	Yes
OS: Manager Update Access	eBusiness Center, organizations, persons, lookup	This profile option sets the level of access for sales team members with the role of TeleSales Manager to update information for their subordinates in the sales organization. This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege. This profile has three possible settings **Update data**: Update. **Inherit data**: Inherit access privilege from subordinate. **View data**: View data only.	View Data
OS: Maximum Roll Days for Converting Amount	Opportunities	Maximum roll days for converting currency amounts if no daily conversion rate exists.	

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Opportunity Access Privilege	eBusiness Center, organizations, persons, lookup	**Global Full:** Users can view and update all opportunities whether they are on the sales team or not. Generally, this access is given to super users only. **Org Full** (Full by Organization)**:** Users can view and update all opportunities whether or not they are on the sales team. However, they are restricted to viewing and updating data for the HR organization they are assigned to in Oracle HRMS. **Prospecting:** Users can view all opportunities but they can make changes only when they are on the sales team. Users can create opportunities for a customer only when they are on that customer's sales team. **Sales Team:** Users can view opportunities only when they are on the sales team. When the opportunity creator selects the Full Access check box on the Sales Team tab for a team member, that team member can update the opportunity. Otherwise the record is view only.	Global Full
OS: Opportunity Sales Credit Enforced Sales Team Definition	Opportunities	If set to *Yes*, only people on the sales team are allowed to receive sales credit.	Yes
OS: Preferred Reporting Currency	Opportunities	Preferred currency for denorm programs.	US Dollar
OS: Project name required	Lead management	A setting of Y requires users to enter a project name for a lead before that lead can be qualified.	Y
OS: Sales Admin Update Access	eBusiness Center, organizations, persons, lookup	An employee with the TeleSales Administrator role (as defined in the Resource Manager) can access the same records as the manager of the group they are assigned to. Groups are also set up in Resource Manager. The access can be of three types: **Update data**: The administrator can update the same data as the manager of the group. **Inherit data**: Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates. **View Data**: Administrators can only view the data created by the manager's subordinates.	R
OS: Sales channel required	Lead management	A setting of Y requires users to enter a sales channel for a lead before that lead can be qualified.	Y

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OS: Sales Lead Access Privilege	eBusiness Center, organizations, persons	Controls the level of access to leads. The available settings are: **Full**: Employees can view and modify all leads, even those not assigned to them. **Sales Team**: Only the employee who has been assigned the lead can view and modify it. **Prospecting**: Employees can view all leads but cannot update any.	
OS: Sales Methodology	Opportunities	Sales methodology	Object Oriented
OS: Sales Team Creator Keep Flag	Opportunities	Default keep flag for sales team creator.	
OS: Total budget amount required	Lead management	A setting of Y requires users to enter the total budget amount for a lead before that lead can be qualified.	Y
OS: Allow Updating Frozen Opportunities	Opportunities	Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze check box selected. This profile can be set at either the responsibility or the user level. When set to *Y*, this profile option allows the user or responsibility to make changes. An *N* setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze check box is selected. This includes the Freeze check box itself.	
OTS: Advanced Inbound Installation	Universal Work Queue	Set to *Yes* if Advanced Inbound has been installed.	
OTS: Advanced Outbound Installation	Universal Work Queue	Set to *Yes* if Advanced Outbound has been installed.	
OTS: Assign New Lead Manually	Leads	A setting of *Yes* means that the creator of a new lead must assign the lead by making an entry in the Assign to field. If set to *No*, a new lead is assigned by the Assignment Manager automatically after it is saved.	
OTS: Associate Relationship Location To Organization	Addresses	A setting of Yes, causes any address you enter for a contact at an organization (party of type party relationship) automatically to become an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. A setting of No turns this feature off.	Yes

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OTS: Contact Role	Organizations, Persons	Sets the default contact role for an organizational contact.	
OTS: Default Collateral Reply to Email Address	Event confirmation letter	Enter the email address you want collateral recipients to use when replying collateral confirmation emails.	
OTSL Default Collateral Subject Line	Event confirmation letter	Enter the subject line for the collateral confirmation email.	
OTS: Default Country	Organizations, Persons	Sets the default country used for address creation.	
OTS: Default Event Reply to Email Address	Event confirmation letter	Enter the email address you want event enrollees to use for replying to enrollment confirmation emails.	
OTSL Default Event Subject Line	Event confirmation letter	Enter the subject line for the enrollment confirmation email.	
OTS: Default Party Type	Organizations, Persons	Sets the default party type for the eBusiness Center header. Available values are: Person Organization Party Relationship	
OTS: Default Person Title	Organizations, Persons	Sets the default title for a person in the eBusiness Center header.	
OTS: Default Phone Line Type	Organizations, Persons	The default phone type for the eBusiness Center header.	
OTS: Default Quote Form	Quotes/Orders	Determines whether Oracle TeleSales uses the quote UI from Order Capture or from Sales for Comms.	Order Capture
OTS: Default Relationship	Organizations, Persons	The default selection for the Relation drop-down list in the eBusiness Center header.	
OTS: Default Site Usage	Organizations, Persons	The default type for the address in the eBusiness Center header. For example: Bill to, Ship to.	
OTS: Default User Role and Sales Group	Selection of role and group	Entering a default user role and group in this profile means that the user no longer has to choose a role and group each time they launch the eBusiness Center. You need not set a default for a user that has only one role and group.	

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OTS: Display Customer Profile	eBusiness Center	A setting of *Yes* enables the customer profile area of the eBusiness Center. A setting of *No* means the fields are disabled.	
OTS: Enable Address Validation	Organizations, Persons	A setting of *Yes* turns on address validation.	
OTS: Generate Collateral Activity	Universal Work Queue	If set to *Yes*, the application generates a record of collateral activities such as sending out collateral.	
OTS: Generate Customer Activity	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to customer records.	
OTS: Generate Event Activity	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to events.	
OTS: Generate Lead Activity	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to leads.	
OTS: Generate Opportunity Activity	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to opportunities.	
OTS: Identifying Address	Organizations, Persons	A *Yes* setting sets the address displayed in the header to be the identifying (primary) address for the party.	
OTS: Max Interactions Displayed	eBusiness Center	Determines how many interactions to display in the overview tab.	
OTS: Minimum Number of Characters for Lookup	All searches	Improves search performance by forcing agents to use a minimum number of characters for their searches.	None
OTS: Notes Interaction Activity	Interactions	If you wish to track activities for notes, then set this profile option to *Yes*.	
OTS: Primary Contact Role Flag	Organizations, Persons	Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window.	Y
OTS: Queue: Forecasts	Universal Work Queue	Set this profile option to *Yes* if you wish users to view forecast notes in the Universal Work Queue. This profile is set to No by default.	No
OTS: Queue: Leads	Universal Work Queue	Set this profile option to *No* if you do not wish users to view lead notes in the Universal Work Queue. This profile is set to *Yes* by default.	Yes
OTS: Queue: Opportunities	Universal Work Queue	Set this profile option to *No* if you do not wish users to view opportunity notes in the Universal Work Queue. This profile is set to *Yes* by default.	Yes

Oracle TeleSales System Profile Options

User Profile Name	Affects	Description	Default
OTS: Rank Lead Option	Lead	This profile option turns on the automatic ranking of leads using the score card. If set to *Manual*, then user scores leads manually by clicking the Rank button in the Lead Center window. Otherwise, the application scores leads automatically based on the values entered in the score card.	
OTS: Scripting Installation	Universal Work Queue	Set to *Yes* if scripting has been installed for TeleSales.	
OTS: TeleSales Interaction Enabled	Interactions	If set to Yes, TeleSales records interactions after the interaction is started.	No
Start Menu In Quick Menu	eBusiness Center	Set the value to `TeleSales Quick Menu` to enable the Quick Menu for TeleSales. All applications using Quick Menu share this profile option.	

Step 25: Set Up Oracle TeleSales Lookups

Oracle TeleSales includes lookups with three different levels of modification:

- **System**: The implementer can only change the wording of a list of value (LOV) choices the user sees on the screen. No deletions or additions are allowed.
- **Extensible**: The implementer can change both the wording of the LOV choices and add new choices for the user.
- **User**: The implementer can change the lookup completely, deleting and adding LOV choices at will.

The following table lists lookups, their defaults, and the areas they affect.

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AMS	AMS_EVENT_PAYMENT_STATUS		Events	
AR	ACCOUNT_STATUS		Accounts	
AR	ADDRESS_LABEL		eBusiness Center	
AR	CODE_STATUS		Persons, organizations, Accounts	
AR	COMMUNICATION_TYPE		Persons, organizations	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AR	CONTACT_ROLE_TYPE		Persons, organizations	
AR	CONTACT_TITLE		Persons, organizations	
AR	CONTACT_TYPE		Persons, organizations, events, collateral	
AR	COUNTRY		eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting	
AR	CREDIT_RATING		Persons, Organizations	
AR	CUSTOMER_CATEGORY		Accounts. persons, organizations	
AR	CUSTOMER_TYPE		eBusiness Center	
AR	DAY		eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue	
AR	DEPARTMENT		Persons, organizations, lookup	
AR	FOLLOW_UP		Opportunities, Universal Work Queue	
AR	FORM_NAME		eBusiness Center, persons, organizations, leads, quotes/orders, Universal Work Queue	
AR	INTEREST_TYPE		Leads, opportunities, lookup	
AR	JOB_TITLE_CODE		Persons, Organizations	
AR	LANGUAGE		Persons, organizations, opportunities, events, lookup, scripting	
AR	MONTH		Lookup	
AR	NOTE_TYPE		eBusiness Center, leads, opportunities, events	
AR	OWNER_TABLE_NAME		Persons, organizations, opportunities, lookup	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AR	PARTY_RELATIONS_TYPE		Persons, Organizations	
AR	PARTY_SITE_USE_CODE		Persons, Organizations	
AR	PARTY_TYPE		eBusiness Center, persons, organizations, accounts, leads, opportunities, quotes / orders, events, collateral	
AR	PAYMENT_TYPE		Events	
AR	PHONE_LINE_TYPE		Persons, organizations, opportunities	
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	
AR	RESPONSIBILITY		Persons, organizations, Universal Work Queue	
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	BUDGET_AMOUNT		Leads, lookup	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	DECISION_TIMEFRAME		Leads	
AS	INTEREST_USE		Opportunities	
AS	ISSUE		eBusiness Center, leads, opportunities	
AS	LEAD_CONTACT_ROLE		Leads	
AS	LEAD_SOURCE		Leads, opportunities	
AS	PRM_LEAD_TYPE		Opportunities	
AS	REJECT_REASON_CODE	ASSIGN_ERROR DUPLICATE VACATION	Leads	
AS	ROLE_TYPE		Persons, Organizations, accounts, lookup	
AS	SALESFORCE_RELATIONSHIP		Opportunities	
AS	UPDATE_ACCESS		eBusiness Center	
AS	VEHICLE_RESPONSE_CODE		Leads	
AS	VEHICLE_RESPONSE_CODE		Opportunities	
AS	VEHICLE_RESPONSE_CODE		Lookup	
ASO	ASO_ITEM_TYPE		Accounts	
ASO	ASO_QUOTE_RELATED_OBJECTS		Quotes/Orders	
AST	AST_QUOTE_ORDER_VIEW_BY_ LIST	ORGANIZATION PERSON RELATIONSHIP	Quotes/Orders	

Lookups for Oracle TeleSales

App.	Lookup Type	Default Values	Affects	Level
AST	AST_QUOTE_ORDER_VIEW_LIST	ORDERS QUOTES	Quotes/Orders	
AST	AST_SCALING_FACTOR	MILLIONS THOUSANDS	Persons, Organizations	
JTF	ACTION_TYPE	ADD ANSWER CREATE_FSR DEL INQ INTERACT RECONCILE SENT TRANSFER UPD UPDATE_FSR UPSELL WAIT XSELL	Events, Universal Work Queue	

Step 26: Set Up Flexfields

Set up flexfields according to the steps outlined in the *Oracle Applications System Administrator's Guide*.

Step 27: Enable Web Directory Assistance

Use this procedure to enable web directory assistance for agents.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Directory Assistance Administration.

   The Web Directory Assistance Administration window appears.

2. Using your browser, navigate to the web directory assistance service you wish to use

3. Perform a search for any individual. For example, for John Doe in California.

   Keep the page with the results open. You will need to refer to it for the rest of this procedure.

   For example, navigate to www.superpages.com, select the People Pages tab, and search for John Doe in California.

   The search returns a page with the following URL:

   `http://wpg2.superpages.com/wp/results.phtml?SRC=&STYPE=WS&PS=15&PI=1&WF=John&WL=Doe&T=&S=CA&search=Find&pow=0&rtd=wpg1.superpages.com`

4. In the Proxy Host field, enter the name of your organization's proxy server.

5. In the Port field, enter the port number for the proxy server.

6. In the Search URL field, enter the part of the URL before the delimiter.

   In the SuperPages.com example, the delimiter is `?` so you enter: `http://wpg2.superpages.com/wp/results.phtml`

7. In the CGI Server field, enter your name for this service. This is a free-form text field.

8. In the Next Page ID field, enter the text of the hypertext link that indicates the next page. You are entering the link text as the user sees it; not the HTML source. The text is case sensitive.

   For example, in SuperPages.com that text is `Next`.

9. In the Max Pages field, enter the maximum number of pages of results you wish Oracle TeleSales to parse.

10. Select the Enabled check box.

> **Note:** You can enable only one service at a time.

11. Enter the CGI switch separator.

    In the SuperPages.com example this is &.

12. In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant. This is the portion that you made no entries in.

Note: You may need to perform additional searches to determine what portion of the URL remains constant.

In the SuperPages.com example this is: `SRC=&STYPE=WS&PS=15&PI=1.`

13. In the Trailer Constant field, enter the constant part of the URL after the search terms.

    In the SuperPages.com example this is: `&search=Find&pow=0&rtd=wpg1.superpages.com.`

14. Click **CGI Switches**.

    The CGI Switches window appears.

15. Enter information on each of the switches. The switches are the CGI script variables used for your search criteria. In the SuperPages.com example these are: `WF`, `WL`, `T`, and `S`. For each switch:

    a. Enter the switch in the Code field. The entry is case sensitive.

    b. Enter the Data Separator. For SuperPages.com this is =.

    c. Enter a number indicating the order this switch appears in the URL.

    d. If user entry for this switch is required, then select the Required check box.

    e. Select the appropriate check box to indicate the search criteria this switch is used for. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.

16. When you are finished entering the CGI switches, click **Save** on the toolbar

17. Click **Close**.

Step 28: Enable Directory Assistance

Use this procedure to enable the agent dialing of directory assistance numbers. You can set up multiple directory assistance numbers.

Steps

1. Under the TeleSales Administrator responsibility, navigate to Phone Directory Assistance Administration.

   The Phone Directory Assistance Administration window appears.

2. Enter information about the directory assistance services. For each service:
   a. In the Name and Description fields, enter the name and description of the service. These are visible to the agents.
   b. In the Country Code field, enter the country code for the country this service is in. If the country is the United States, then enter `01`.
   c. In the Phone Number field, enter the phone number. Any standard format is acceptable, for example: `555-1212.`
   d. Enter an extension, if any.
   e. Make sure the Enabled check box is selected.
3. Click **Save** on the Toolbar.

Step 29: Run Concurrent Programs

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

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

Concurrent Programs Used by Oracle TeleSales

Oracle TeleSales includes the following concurrent programs:

- **Assign Territory Accesses**: (optional). This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting two profile options:
  – OS: Territory Minimum Number of Records for Parallel Processing
  – OS: Territory Number of Child Processes
- **Generate Access Records** (optional)
- **Load Sales Credit Mviews**: (mandatory). Used for the home page bins. This program must be run initially before users can set up bins. This program loads the materialized view with sales credit information. No parameters are needed.

- **Refresh Sales Credit Mviews**: (mandatory). This program is used to run an incremental refresh of the materialized view. This program should be scheduled to run periodically.
- **Refresh of as_sales_credits_denorm**: (mandatory). Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters are:
  - Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh)
  - Incremental Refresh = Run in this mode for an incremental refresh.
- **Incremental refresh of as_mc_sales_credits_den table**: Used to refresh conversion rates. This programs should be run after transaction currency to reporting currency mapping is completed, or after changing any conversion rates. See Step 5k earlier in this document. Parameters are:
  - From Currency
  - To Currency

Running Concurrent Programs

Use the following procedure to run concurrent programs.

Steps

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