

# Oracle® TeleSales

Concepts and Procedures

Release 11*i*

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**ORACLE®**

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Oracle TeleSales Concepts and Procedures, Release 11i

Part No. A86831-05

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**Part No. A86831-05**

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# Preface

Welcome to the Oracle Customer Relationship Management, Release 11*i*, suite of applications.

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle TeleSales.

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

## Intended Audience

This guide is aimed at the following users:

- TeleSales Administrators
- TeleSales Managers
- TeleSales Agents

## Structure

This manual contains the following chapters:

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

“Using Oracle TeleSales” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

## Conventions

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
...	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
<b>boldface text</b>	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

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# Understanding Oracle TeleSales

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

## About the Oracle TeleSales User Interface

Oracle TeleSales user interface is based on Oracle Forms technology. For an understanding of the user interface, see the *Oracle Applications User's Guide*.

Additional help is available on:

- [Searching in Oracle TeleSales](#)
- [Manipulating and copying table data](#)

## About Searching In Oracle TeleSales

This topic covers the different ways of searching for information in Oracle TeleSales:

- [Fast searches using the List of Values](#)
- [Searching on multiple criteria via the Universal Search window](#)
- [Finding text](#)

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**Note:** Oracle TeleSales does not support the Query Enter / Query Run method of searching common to most Oracle applications.

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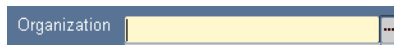
## Fast Searches Using the List of Values

The fastest way to search the Oracle TeleSales database is to use the Lists of Values (LOVs) provided with many fields.

A button with an ellipsis indicates a field contains an LOV:



This button appears only when you place your cursor within the field. Here is an example of a field with an LOV from the eBusiness Center:



Clicking the LOV button or pressing CTRL+L on your keyboard brings up the LOV window for your searches.

As you can only use only one LOV field at a time, however, this type of search does not work well with common terms, including common names such as name John Smith.

Searching for John Smith using the First Name LOV or the Last Name LOV, may return hundreds of John Smiths for your to sort through. In this case, you must use additional search criteria available via the Universal Search window.

## Searching On Multiple Criteria Via the Universal Search Window

Use the Universal Search window to search for information using multiple search criteria. You can launch this window by clicking the Find (the flashlight) icon in the toolbar, choosing Find from the View menu, or by clicking the Find button in the eBusiness Center.

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**Note:** If you wish to search on partial words or numbers, then you must use the % character to indicate missing or unknown characters.

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## Finding Text

You can search information displayed in dynamic tables by right clicking in the table and making a selection from a pop-up menu. You can search all information. This includes text within notes, information entered using the lists of values and drop-down lists, as well as information supplied by the application, such as opportunity numbers and account numbers.

You can recognize a dynamic table by its striped rows and headers. Here is an example:

Assigned/Recd. Date	Number	Last Update Date
08-FEB-2001	3358	08-FEB-2001
08-FEB-2001	3356	08-FEB-2001
18-JAN-2001	2836	28-JAN-2001
17-JAN-2001	2816	19-JAN-2001
18-JAN-2001	2837	19-JAN-2001
15-JAN-2001	1831	18-JAN-2001
15-JAN-2001	2733	15-JAN-2001
11-JAN-2001	2705	11-JAN-2001
11-JAN-2001	2708	11-JAN-2001
01-DEC-2000	2151	01-DEC-2000

For a detailed explanation of searching within tables as well as other ways you can customize the presentation of data, see [Manipulating Data in Your Work Queue and Other Dynamic Tables](#).

## About Creating and Using Lists

You can create lists of customers, events, leads, opportunities, and other objects for use in your sales activities in the Oracle TeleSales Lookup Center, which you launch by making a selection from the Navigator.

For example, you may wish to create a list of hot leads, a list of open opportunities, and a list of customers who wish to receive collateral and enroll in events.

To create a list, you perform a search that is similar to the complex search using the Universal Search window. The only difference is the last step: you save the results of your search as a list.

If you wish to refresh a list frequently, you can save your search criteria so you need not reenter them every time. This is done by clicking the Save Folder button.

## An Overview of the eBusiness Center

The eBusiness Center serves as the central work area for Oracle TeleSales.

Use it to create and manage customer records, leads, opportunities, and events. It is here you send out collateral, enroll your customers in events, and launch the Oracle Order Capture window where you prepare quotes and orders.

The eBusiness Center is divided into five functional areas:

The screenshot displays the Oracle eBusiness Center interface for a customer record. The interface is divided into several sections, with five red boxes highlighting specific areas:

- 1**: Party Type dropdown menu.
- 2**: Party Name field (Hall of Justice).
- 3**: Party Address field (50 Park Ave.).
- 4**: Address table with columns: Primary, Inactive, Address1, City, State, Province, Postal Code, Country, and Address Usage.
- 5**: Call Info button.

Primary	Inactive	Address1	City	State	Province	Postal Code	Country	Address Usage
<input checked="" type="checkbox"/>	<input type="checkbox"/>	50 Park Ave.	New York	NY		95168	United State	Sold to
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

### 1. Header

The header displays basic customer information including the primary address and phone number for the person or organization you are viewing. Although you can enter basic information about the party here, most of the entries are done in the tabs below.

The Party Type drop-down list determines what type of customer information you can view and enter.

## 2. Organizational Profile

When the header displays information about an organization or a business contact (party type of Party Relationship) this region summarizes information about the organization such as the number of open leads and opportunities. You cannot modify information here.

## 3. View Details For Radio Buttons

Selecting a radio button here determines what information you can edit in the twelve tabs below.

## 4. Tabs: Enter Contact, Organization, and Purchase Information

You use these twelve tabs to enter and manage detailed information for the customer displayed in the header. How the information you enter here is stored in the database depends on the View Details For radio button you selected.

See [About eBusiness Tabs](#) for more information on each tab.

## 5. Telephony buttons

Use these buttons to log into incoming calls, to take a break, and to wrap up.

Before you start using the eBusiness Center, you must familiarize yourself with [how customer information is organized](#).

# About eBusiness Center Tabs

The twelve tabs of the eBusiness Center is where you enter and manage detailed information for the customer displayed in the header.

Which tabs are active and how the information you enter here is stored in the database depends on which of the View Details For radio buttons you select. For example, if you select the radio button with the name of the person and enter an address, then this address is stored in the database linked to the record of the person as a consumer. If you enter the same address after selecting the radio button labeled with the name of the person and the organization they represent, then this address is stored linked to this relationship and will not be visible when you are looking at addresses with the first radio button selected. A separate topic covers [how customer information is organized](#).

The twelve tabs are:

- [Overview](#)

- [Organization](#)
- [Person](#)
- [Address](#)
- [Relationships](#)
- [Accounts](#)
- [Leads](#)
- [Opportunity](#)
- [Quote/Order](#)
- [Event](#)
- [Collateral](#)
- [Task](#)

## About the Overview Tab

Use the Overview tab to enter the campaign the customer is calling about, to launch scripts, enter and view notes and interactions that pertain to the organization or contact.

## About the Organization Tab

The Organization tab is where you:

- View and enter basic information about an organization, including phone numbers, email addresses, web site URLs, revenue, and the number of employees.
- Restrict use of phone numbers and emails.
- Assign individuals to a sales team, enter an organization's purchase interests, and view the organization's installed base of products.

This tab is enabled only when the header displays an organization or an organizational contact (party relationship).

## About the Person Tab

The Person tab is where you:

- View and enter personal information about an organizational contact or consumer, including phone numbers, email addresses, and web site URLs.
- Restrict use of personal phone numbers and emails if the individual does not want to be contacted.
- Track the individual's personal interests, job experience, education, and leisure activities.

This tab is disabled when you select the radio button for the organization in the View Details For region.

## About the Address Tab

The Address tab is where you enter addresses and specify their uses. To create quote and orders, to ship collateral, and to enroll contacts in events, you must specify a bill to and ship to addresses.

The address you designate as primary here is what appears in the eBusiness Center header.

A single address can have multiple uses. You can specify the multiple uses for a single address by selecting the address on the left side of the tab, and entering the address uses in the Address Type column.

The following image shows the three different uses for the selected address (3129 Pollstime Ave.). The Address Types are: Bill To, Headquarters, and Ship To.

Primary	Inactive	Address1	City	State	Postal Code	County	Country	Address Type
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3129 Pollstime Ave	Irving	TX	75014	Initidine	United State	Bill To
<input type="checkbox"/>	<input type="checkbox"/>	1549 Third Street	Santa Monica	CA	90404	Los Angel	United State	Headquaters
<input type="checkbox"/>	<input type="checkbox"/>							Ship To

## About the Relationships Tab

Use the Relationships tab to capture the relationships between parties in the database. This is where you specify one company is the subsidiary of another, that one of your contacts is the manager of another and where you make changes when a contact moves from one company to another. See [Understanding Relationships](#) for more detail.

## About the Accounts Tab

Use the Accounts tab to view information about a customer's accounts. The information on the Accounts tab and its subtabs may come from Oracle Receivables, or other accounting packages. Information on the Credit and Suspension tabs of the Customer Details window, which is available by clicking Details, is used by consulting to display information from other legacy systems.

## About the Leads Tab

Use the Leads tab and the Lead Center to manage leads for the customer displayed in the eBusiness center header.

This topic covers:

- [Overview](#)
- [Refusing lead assignment](#)
- [About lead status](#)
- [Ranking](#)
- [Assigning qualified leads to sales representatives](#)

## Overview

Leads are designed to capture the initial contacts with potential customers, gathering just enough information to tell a sales organization if a lead merits more sales resources, should be set aside for a later date, or abandoned entirely.

Agents use leads to gather information on:

- The products a customer is interested in purchasing
- The budget
- Names of contacts associated with the lead
- The time frame for the sale
- Tasks relating to the lead
- Notes

The person creating a lead has the option of assigning it manually to a sales agent or letting the CRM territory management program automatically assign the lead to a sales team member.

## Refusing Lead Assignment

A sales agent can refuse a lead assignment and reassign the lead to someone else.

## Lead Status

The progress of a lead is tracked by its status. A new lead has the status of new by default and must attain a status of qualified before it can be turned into an opportunity.

Agents can enter a status of a lead manually or let the application evaluate the status automatically. The application changes the status to qualified after agents enter information in a set of fields determined by your implementation team. These include project name, time frame, and budget.

To qualify a lead, the application looks to see only if an entry has been made in the specified fields. It does not evaluate the quality of the lead. The automatic lead status assignment takes place each time the lead is saved.

In addition to entering required lead information, the agent must evaluate the likelihood of a particular lead turning into a sale by assigning it a rank.

## Ranking

Lead rank tracks the desirability of the lead. Agents can let the application assign the rank automatically by clicking the Rank button, or they can select a value manually from the Lead Rank drop-down list.

The application determines the quality of the lead by using a [lead score card set up by the application administrator](#). The score card assigns different numbers of points to entries depending on desirability. For example, a time frame of 1-3 months receives more points than a time frame of 1 year. A budget of \$1 million receives more points than a budget of \$10,000.

## Assigning Leads To Sales Representatives

Lead creators can either allow the territory assignment program to assign the leads to sales representatives automatically or choose the sales representatives manually. The sales representatives then turn the leads into new opportunities or link them to existing opportunities.

## About the Opportunity Tab

Use the Opportunity tab to view and manage sales opportunities. An opportunity takes the potential sale from a qualified lead through the negotiation stage.

This topic covers:

- [Overview](#)
- [How you create an opportunity](#)

### Overview

Use an opportunity you can track:

- **Purchase Interest:** Enter Products the customer is interested in buying.
- **Sales Team:** Add sales team members or let the territory management module assign a team.
- **Sales Credit:** The sales credit the sales team members are to receive.
- **Contacts:** Contacts for the opportunity.
- **Obstacles:** Enter information about your competitors.
- **Closing Information.** Track orders placed for won opportunities as well as information about competitors for lost opportunities. If an opportunity results in a sale, you must remember to enter closing information for an opportunity so the sales team can receive sales credit for their work.
- **Classification:** Classify an opportunity according to categories defined by your implementation team. The values you enter here can be used to assign this opportunity to the appropriate sales team. If your company has a lead generation organization that forwards leads to you, then this window is likely to include information that they entered when the lead was created.
- **Tasks:** View and assign tasks relating to the opportunity. The tasks appear in the work queue of the individual you assign them to.
- **Leads:** View the leads linked to the opportunity.
- **Quotes and Orders:** Create and view the quotes and orders resulting from the opportunity.

[Back to top](#)

## How You Create an Opportunity

You can create an opportunity in one of two ways:

- [From a qualified lead](#)
- [By clicking the New button in the Opportunity tab](#)

### Creating an Opportunity from a Qualified Lead

When a sales representative attempts to create an opportunity from a lead, Oracle TeleSales automatically performs a check for potential duplicates.

If the application finds a potential duplicate, the sales representative can:

- Link the lead to the existing opportunity.

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**Note:** Agents can link a lead to existing opportunities even if they do not have access to those opportunities.

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Purchase and other information is not transferred to the matching opportunity, but agents can access the lead from the Leads tab of the linked opportunity.

- Copy purchase line items to the duplicate opportunity.

The copied items are transferred to the potential purchases in the existing opportunity. The copy process removes them from the lead.

The sales representative creating the new opportunity becomes the leader of the opportunity team. Any team member required to make modifications to opportunity information must be designated as "Full Access". This is done by selecting the Full Access Check box.

The application automatically notifies new team members of the assignment via their work queues.

The team members use the opportunity as a repository for information on the negotiations, to prepare forecasts, and assign sales credit.

A team leader can decide to create a quote for a customer at any time. Quotes can be configured for all of the purchase items.

### Creating a New Opportunity Directly

You can create new opportunities without a prior lead, by clicking the New button in the Opportunity tab.

## About the Quote and Order Tab

Use the Quote and Order tab to view orders placed with Oracle Order Management and quotes created in Oracle Order Capture. You can launch Oracle Order Capture from this tab to create new quotes and orders.

## About the Event Tab

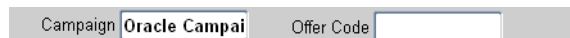
Use this eBusiness Center tab to enroll customers or prospects in events that have been set up in Oracle Marketing Online.

This tab uses the concept of a shopping cart to let you create a single order for multiple events.

The tab is divided into three major regions

- [Campaign and offer entry](#)
- [Basic event information and shopping cart](#)
- [Payment](#)

## Campaign and Offer Entry



The image shows a screenshot of a web form with two input fields. The first field is labeled 'Campaign' and contains the text 'Oracle Campai'. The second field is labeled 'Offer Code' and is currently empty.

Making an entry in the Campaign and Offer fields narrows down the list of events you can choose from. You can leave these fields blank to see all events, but you must enter at least one campaign before you can complete the enrollment process. You are not limited to entering events just from one campaign but you must enter at least anyone.

## Basic Event Information and Shopping Cart

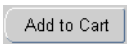

Event Description				Item View			
Event Name	ESP95MCV EX Event			Item ID	Spots	Waitlist	0
Event Desc				UOM		Unit Price	
Date: Start	01-JUN-00	End	31-MAY-01	Type	LAUNCH	Price List Name	
Time: Start		End		Enrollees		Discount	
Coordinator	Ventrano, Mr. MC	Phone				Ext Price	
Search Event ...		Related Items ...		Add to Cart		Mass Event Reg	Item Details ...
						Clear	

The Event Description and Item View regions together display the basic information about an event and serve as a temporary shopping cart.

Unlike many shopping carts on the Internet, this cart only serves as a temporary holder which is cleared out each time you switch customer records or exit the application.

The two regions display both events you have added to the cart and those events you are merely viewing.

You can tell whether an event has been added to the cart by the status of the Add to Cart button. The following table details the two different button states and their meaning.

Button State	Meaning
Enabled  	The item displayed in the Event Description and Item View regions has not yet been added to the shopping cart.
Disabled  	The item displayed in the Event Description and Item View regions has been added to the shopping cart. You can enroll contacts in the event by clicking the Enroll button.

You accumulate those events a customer is interested in attending in the cart by clicking Add to Cart and entering the enrollees using the Enrollees LOV. When you have added all the events with their enrollees to the cart, then you click the Enroll button to complete the enrollment and view confirmation information in a separate window.

If you wish to see the enrollment details or detailed information about an event, then you click the Item Details button.

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**Note:** The Mass Event Registration button is reserved for future use.

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Clicking the Clear button removes an item from the shopping cart.

## Item Number Indicator

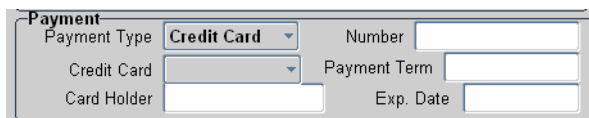


The first number in the Item # fields tells you which item in the shopping cart you are viewing. The second number tells you how many have been added to the shopping cart.

Use the arrow controls to move through shopping cart items. The following table shows the different arrow buttons and their functions:

Button	Function
	Go to the next item in the cart.
	Go to the previous item in the cart.
	Go to the first item in the cart.
	Go to the last item in the cart.

## Payment



The screenshot shows a form titled "Payment" with the following fields:

Payment Type	Credit Card	Number	<input type="text"/>
Credit Card	<input type="text"/>	Payment Term	<input type="text"/>
Card Holder	<input type="text"/>	Exp. Date	<input type="text"/>

The Payment region lets you enter payment for the event.

This feature is not implemented in the current release. This means you cannot process payment for events within Oracle TeleSales.

## About the Collateral Tab

This is where you create an order for collateral to be sent to your customers and prospects via the 1 to 1 Fulfillment module of CRM eBusiness Suite. This version of the CRM eBusiness Suite supports only electronic collateral.

Recipients and their email addresses must already be entered in the database before you can create an order.

You can use the Collateral tab's shopping cart to create an order to email collateral to multiple contacts at one organization. For consumers, you can add multiple recipients to one order only if the individuals have a relationship established within the database.

The Collateral tab is divided into four major regions

- [Campaign and offer entry](#)
- [Collateral item description](#)
- [Collateral item quantity and intended recipient](#)
- [Shopping cart indicator which tells you how many items you have in the order](#)

## Cover Letter and Campaign Entry



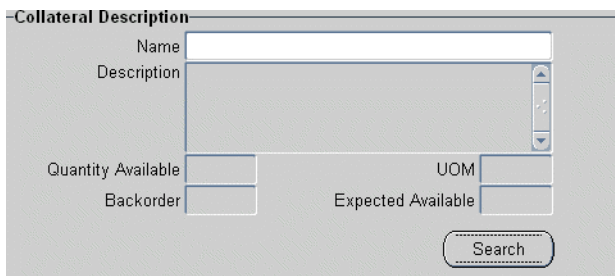
The screenshot shows a form with two input fields:

Cover Letter	<input type="text"/>
Campaign	<input type="text"/>

The cover letter is the letter sent along with the collateral. This letter must be created within Oracle Marketing Online.

Making an entry in the Campaign field narrows down the list of collateral that appears in the Name field list of values. By leaving this field blank you can access the collateral associated with all campaigns, but you must enter at least one campaign before you can complete the order. You can order collateral associated with multiple campaigns in the same order.

## Collateral Description

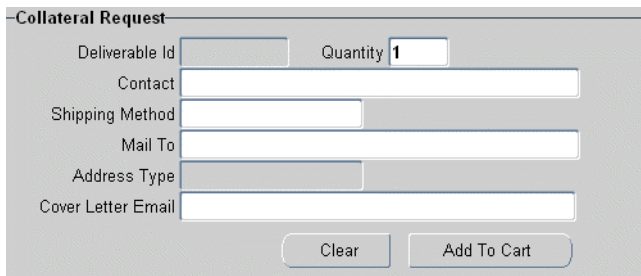


The screenshot shows a form titled "Collateral Description". It contains several input fields: "Name" (a text box), "Description" (a large text area with a vertical scrollbar), "Quantity Available" (a text box), "Backorder" (a text box), "UOM" (a text box), and "Expected Available" (a text box). A "Search" button is located at the bottom right of the form.

The Collateral Description region is where you enter and view the collateral items you wish to email.

You use it to view both collateral you wish to add to the cart and collateral items already in the cart.

## Collateral Quantity and Intended Recipient



The screenshot shows a form titled "Collateral Request". It contains several input fields: "Deliverable Id" (a text box), "Quantity" (a text box with the value "1"), "Contact" (a text box), "Shipping Method" (a text box), "Mail To" (a text box), "Address Type" (a text box), and "Cover Letter Email" (a text box). There are two buttons at the bottom: "Clear" and "Add To Cart".

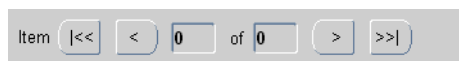
The Collateral Request region is where you enter:

- **Quantity.** This field applies to physical collateral only. You need not make an entry in this field as the current version of Oracle TeleSales does not support the mailing quantity of physical collateral.
- **Information about the recipient.** For electronic collateral, this is the name and email.

Clicking the Clear button removes the item being displayed and from the shopping cart.

Clicking the Add to Cart button adds the collateral item and recipient to the cart.





## Shopping Cart Indicator



The shopping cart indicator tells you how many items you have in the order.

The first number in the Item fields tells you which item in the shopping cart you are viewing. The second number tells you how many have been added to the shopping cart.

Use the arrow controls to move through shopping cart items. The following table shows the different arrow buttons and their functions:

Button	Function
	Go to the next item in the cart.
	Go to the previous item in the cart.
	Go to the first item in the cart.
	Go to the last item in the cart.

## About the Task Tab

Use the Task tab of the eBusiness center to assign tasks pertaining to individual consumers, organizations, and organizational contacts.

A task you create here appears in the work queues of the individual you assign as the owner of the task.

If you wish to assign a task for an opportunity or a lead, then create the task in the Lead or Opportunity tabs instead. Where you create a task determines how a task is categorized in the work queue.

## How Customer Information is Organized

Oracle TeleSales uses the TCA 11i customer model which stores information about organizations, people, and the relationships between them as separate entities. You must make sure that you select the correct entity when you enter customer information.

This topic explains how the customer model affects the way you enter and view information. It covers:

- [Customer model overview](#)
- [How the party type affects you view and enter customer information](#)

## Customer Model Overview

The database stores information you enter under three separate entities. These are called parties:

- **Person:** Use this party type to enter personal information for both consumers and contacts at organizations. Personal information includes home address, phone, as well as quotes and orders for purchases an individual makes as a consumer. If your organization sells to consumers, then this is the party type you will be using almost exclusively.
- **Organization:** Use this party type to enter information about the organization you are doing business with. Using this party type you can also view all of the quotes and orders for business purchases made by contacts at this organization.
- **Party relationship:** Use this party type to enter contacts for an organization. If your organization sells primarily to other businesses and organizations, then you will be using this party type most of the time.

Each of these parties can have its own billing and shipping addresses, telephones, notes, and associated tasks.

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**Note:** If you are entering addresses for a contact at an organization (party of type party relationship), then all addresses are automatically copied to the organization as well. Your application administrator can disable this feature by resetting the profile option `OTS: ASSOCIATE RELATIONSHIP LOCATION TO ORGANIZATION` to no. Note that only addresses are copied over, not phone numbers, email addresses and other information.

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## How Party Types Affect the Way You View and Enter Customer Information

When you enter a contact at an organization using the party relationship party type, the application creates all three party types.

Suppose, for example, you enter Jack Kirby, the purchasing manager at the Hall of Justice, as a new customer at a new organization. The application automatically creates three parties:

- **Person:** Jack Kirby
- **Organization:** Hall of Justice
- **Party Relationship:** Jack Kirby purchasing manager of the Hall of Justice

The different party types are designed to hold different types of information.

You must use the person party type to:

- Enter and view Jack Kirby's home address and other contact information.
- Enter and view his personal interests.
- Enter and view all purchases he makes as a consumer. If Jack Kirby's buys a christmas gift for his daughter Samantha, for example, then you must record this sale using the person party type.
- Capture relationships between Jack Kirby and other people. Here is where you enter the fact that Jack Kirby is the father of Samantha Kirby.

You must use the organization party type to:

- Enter and view general information about the Hall of Justice, Jack Kirby's employer.

- View quotes and orders for the organization. This includes those placed by Jack Kirby in his capacity as employee of the organization.
- Manage leads and opportunities for the Hall of Justice. This includes any leads and opportunities on which Jack Kirby is the contact.
- View all of the other contacts at the Hall of Justice.
- View all of the quotes and orders for the Hall of Justice.

You must use the party relationship party type to track information relating to Jack Kirby's job:

- Enter addresses, phone numbers, and other information for Jack Kirby in his capacity as a purchasing manager of Hall of Justice.
- Capture the relationship between Jack Kirby and different organizations. If Jack Kirby changes jobs and moves to another organization, this is the party type you use to record his move.

## How to Select the Party Type in the eBusiness Center

This topic explains how you select a party type in the eBusiness Center. Before reading this topic, you must understand the concept of party types as described in [How Customer Information Is Organized](#).

You can display up to two different party types in the eBusiness center at the same time: one in the header and another in the tabs below:

- [The Party Type drop-down list controls the party type in the header.](#)
- [The View Details For radio buttons control the party type in the tabs.](#)

### The Party Type Drop-Down List Determines the Party for the Header

The Party Type drop-down list in the top left hand corner of the eBusiness Center determines what party type information you enter or view in the header.



The choice of party you make here also restricts what party types you can view and enter in the tabs below.

If the header displays a consumer (party type of person), then you can only access consumer information in the tabs below.

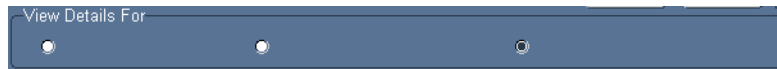
If the header displays an organization, then you are restricted to viewing and entering information for the organization.

If the header displays an organizational contact (party of type party relationship), then you can use the tabs below to view and enter information for all three parties: consumers, organizations, and organizational contacts.

## The View Details For Radio Buttons Determine the Party Type for the Tabs

The radio buttons in the middle of the eBusiness center is where you select what party type you wish to view and modify in the eBusiness center tabs.

When the header does not display a customer or organization, the radio buttons are not labeled:



When the header displays information on a consumer (party type of person), an organization (party type of organization), or a contact at an organization (party type of party relationship), the buttons are enabled according to the party type you can access in the tabs.

For example, if the header displays information on Jack Kirby, the purchasing manager for the Hall of Justice, the radio buttons are labeled according to the party types you can view and edit using the tabs below:



You can select:

- **Jack Kirby:** To enter and view information that pertains to Jack Kirby, the party type Person. This includes all personal information as well as any purchases he makes as a consumer.
- **Hall of Justice:** To enter and view all information about the Hall of Justice, the party type organization. This includes organizational details as well as all leads,

opportunities, quotes, and orders. Leads, quotes, and orders are tied to the organization and not the contact.

- **Jack Kirby -- Hall of Justice**, to view and enter phone numbers, addresses and other information for Jack Kirby when he acts in his capacity as employee of the Hall of Justice (party type of party relationship).

If you selected Person from the Party Type drop-down list in the header, then you can access information on Jack Kirby, the consumer, only:



By selecting the Jack Kirby radio button, you can use the tabs below to enter and view personal information including addresses, phone numbers, and interests, as well as any quotes and orders Jack Kirby makes as a consumer.

## Understanding Relationships in Oracle TeleSales

You can use the Relationships tab of the eBusiness center to capture both business and personal relationships.

This topic covers:

- [Type of relationships you can capture](#)
- [How to use subject and object relationships](#)

### Types of Relationships You Can Capture

You can capture:

- Business relationships between two individuals, such as "is the manager of". You can establish these types of relationships for business contacts (parties of type Party Relationship).
- Personal relationships between two individuals, such as "is the father of", and "is the son of". You can establish these relationships for consumers and business contacts (parties of type Person and Party Relationship).
- Relationships between individuals and organizations, such as "is an employee of", "purchasing manager for". You can establish these relationships for business contacts (party of type Party Relationship).

- Relationships between different organizations, such as "is a subsidiary of". You can establish these relationships for organizations (party of type Organization).

There is no limit to the number of relationships or the combination of relationships you can capture for any one person or organization.

You can make a relationship inactive, for example, when the contact is on an extended vacation. Or you can terminate a relationship by entering an end date, for example, when an individual moves to another company.

## Capturing Relationships Using Subject and Object Relationships

Most relationships, such as "is the father of", "is a subsidiary of" describe the relationship in only one direction. To capture the relationship between two entities fully, you must also specify the reciprocal relationship.

For example, if you specify that John is the father of Mary, then you must specify that Mary is the daughter of John. If you specify that ABC is the subsidiary of Walt Disney, then you must specify that Walt Disney is the parent company of ABC.

You can capture both sides of relationships using the Subject and Object relationship regions of the Relationships tab. Only the entry in the Subject region is required, but your organization may wish to capture both. Only entries in the Subject region display in the eBusiness Center header.

Here is a sample Relationships tab entry for John Branford, an employee of General Technologies and the father of another customer named Cindy Martin:

Object Relationship						
Inactive	Subject Type	Subject Name	Type	Object Name	Start Date	End Date
<input checked="" type="checkbox"/>	Person	Martin Cindy	Child of	John Branford	06-DEC-2000	
<input type="checkbox"/>						
<input type="checkbox"/>						

Subject Relationship						
Inactive	Subject Name	Type	Object Type	Object Name	Start Date	End Date
<input type="checkbox"/>	John Branford	Contact	Organization	General Technologies	23-FEB-1997	
<input checked="" type="checkbox"/>	John Branford	Parent	Person	Martin Cindy	06-DEC-2000	
<input type="checkbox"/>						
<input type="checkbox"/>						

### Subject Relationship

Enter the main relationship here. This is where you record that John Branford is a contact for General Technologies and that he is the parent of Cindy Martin. The relationship you specify here is the one that appears in the header.

### **Object Relationship**

Enter any secondary relationship that is tied to any existing subject relationship. If you just entered that John Branford is the parent of Cindy Martin, then you may want to capture the fact that Cindy Martin is the child of John Bransford in this region.

## **About Notes**

You can use Oracle TeleSales to keep notes on your customers, opportunities, and leads.

This topic covers:

- [The two ways of creating notes](#)
- [How context determines where you can view a note](#)
- [How to view all notes about a customer, regardless of context](#)
- [Searching note text](#)

## **The Two Ways of Creating Notes**

Any member of the sales team can enter the notes in one of two ways:

- In the New Note field which appears in many of the eBusiness tabs as well as in the opportunity and lead centers.
- In the Note window you can launch by clicking the All Notes button or choosing All Notes from the Tools menu.

The application automatically saves information on the note's creator the date and time the note was saved. Each note is tied to the context in which a sales team member entered it.

A note remains open and editable after you save it until you start working on a different record. If you wish to enter a second note while you are still working in the same record, you must have your cursor in the New Note text box and click the New button on the toolbar.

## **Context Determines Where You Can View a Note**

When you enter a note, it is automatically linked to the object displayed in the tab or window where you create it. For example, if the Lead tab of the eBusiness Center

displays a lead, then the note you enter is automatically linked to that lead. This is true whether you enter the note in the tab itself or in the Note window.

What type of object the note is linked to determines where you can view it. This means that you can only view notes related to leads on the Lead tab, only notes related to opportunities in the Opportunity tab, and only notes related to the party (the customer) on the Overview tab.

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**Note:** When you create an opportunity from a lead, the notes entered by the sales team on the lead are not copied over to the opportunity.

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## How to View All Notes for a Customer, Regardless of Context

While the context of the tabs in the eBusiness center restricts what type of note you can view and enter, you can view any of these types of notes, regardless of context, by using the All Note window. You can launch this window at any time by choosing All Notes from the Tools menu or by clicking the All Notes button supplied in several places in the application.

## Searching Note Text

You can search for text within notes by displaying the list of the notes you wish to search in the Notes window, right-clicking in the list, and selecting Find from the pop-up window. See [Finding Information in Dynamic Tables](#).

## About Attaching Documents, Notes, and Web Pages

The toolbar Attachment icon, a paper clip, indicates whether you can attach a document, a note, or a web page to a record.

You can make attachments in the following areas of Oracle TeleSales:

- Persons
- Organizations
- Relationships
- Addresses
- Leads
- Opportunities

- Quotes
- Orders
- Tasks

When the icon is dimmed, the Attachment feature is not available. When the Attachment feature is enabled in a form block, the icon becomes a solid paper clip. The icon switches to a paper clip holding a paper when the Attachment feature is enabled and the current record has at least one attachment.

For an understanding of how to make and view attachments, see the Working with Attachments chapter of the *Oracle Applications User's Guide*.

# Using Oracle TeleSales

This topic group provides process-oriented, task-based procedures for using and completing essential business tasks.

## Choosing Sales Group Roles

If you have been assigned to multiple sales groups in your organization, then you must choose a role each time you log into the application or launch the eBusiness center. Roles determine your access to information. You can have multiple roles and switch sales groups at any time by making a selection from the Tools menu.

So you do not have to select a sales role each time you run the application, you can set up a default sales group and user role by setting the profile OTS: Default User Role and Sales Group. See [Setting Up a Default Sales Role for Yourself](#).

### Prerequisites

You must be assigned to multiple sales groups. If you are assigned to just one sales group, then you do not have to choose roles to use the application.

### Steps

1. If you have just logged into the application, then the Choose Role and Group window appears automatically.
2. If you wish to switch roles while working in the application, launch the Choose Role and Group window by choosing **Change Role** from the Tools menu.
3. Use the Role and Group List of Values (LOV) to choose a role.
4. Click **OK**.
5. If no roles appear in the LOV, this means no roles have been set up for you. Exit the application and contact your application administrator.

## Setting Up a Default Sales Role for Yourself

Use this procedure to set up a set up a default sales group for yourself. This way you will not have to reenter the sales group each time you launch the eBusiness Center.

### **Prerequisites**

You must be assigned to multiple sales groups. If you are assigned to just one sales group, then you need not set up a default.

### **Steps**

1. Navigate to Personal Profiles.  
The Find Personal Profile window appears.
2. In Profile Name enter: `OTS: Default User Role%`  
The Personal Profiles window appears displaying the system profile `OTS: Default User Role` and Sales Group.
3. Use the User Value List of Values to select a default role and sales group.
4. Click **Save** on the toolbar.

## **Searching Using Universal Search**

[Click here if you wish to obtain help on using Universal Search for creating lists using the Lookup Center.](#)

[Click here if you wish to obtain help on using Universal Search for searching only.](#)

## Searching Using Multiple Search Criteria with Universal Search

Use this procedure to search the application using multiple search criteria.

### Prerequisites

None

### Steps

1. Launch the eBusiness Center.
2. Place your cursor in a field corresponding to the object you wish to search for:
  - a. Select the tab corresponding to the object.
  - b. Place your cursor in one of the fields on the tab.

For example, to search for a lead, select the Lead tab and place your cursor in one of the lead fields, for example, the Description field.

3. Click Find in the toolbar.
4. Enter search criteria on the Basic tab.

The window displays different fields for you to search on depending on the information you are looking for.

The search combines the different search criteria using the logical AND. This means that entering two search criteria returns only results matching both search criteria. For example, searching on a partial name and a partial phone number returns only individuals whose names and phone numbers match both.

You can search for partial numbers and words, but you must use the % sign to indicate missing or unknown characters. For example, a search for j%n in the First name field retrieves all first names starting with the letter j and ending with the letter n, including John, Jon, and Johann.

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**Note:** Using the Basic tab of the Universal Search window, you can only search on the primary address, email, and URL. If you wish to search on all addresses, email addresses, and URLs, then you must enter the search criteria on the Advanced tab.

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5. If you wish to search by criteria not available on the Basic tab, then enter additional search criteria on the Advanced tab:

- a. Use the Item List of Values (LOV) to enter the criteria type.
- b. Use the Condition LOV to enter the operator.
- c. Enter the value.

For example, to search for an event costing less than \$100, enter `Cost` for Item, `<` for the Condition and `100` for the value.

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**Note:** Different fields are available depending on the type of your search.

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**6. Click Search.**

The results of your search appear below.

7. If the object you are looking for is not listed, then try searching with less restrictive search criteria.
8. If the object you are looking for appears on the list, then:
  - a. Select the result.
  - b. Click **OK** to display the result in the eBusiness Center.

**References**

Click below for more detailed procedures on searching for:

- [Consumers, Contacts, and Organizations](#)
- [Events](#)
- [Campaigns](#)

## Using Complex Searches for Consumers, Organizations, and Contacts

Use this procedure to search the database for consumers, organizations, or contacts at an organization using multiple search criteria.

**Prerequisites**

The contact or organization must exist in the database.

**Steps**

1. Navigate to the eBusiness Center.

2. From the Party Type drop-down list, select one of the following:
  - **Person:** if you are searching for a consumer or information about the purchases a contact made as a consumer
  - **Party Relationship:** if you are searching for a contact at an organization.
  - **Organization:** if you are searching for an organization.
3. Click **Find** (the flashlight button) in the toolbar.

The Universal Search window appears.

If you selected Person as the party type, then the Find drop-down list defaults to consumer.

If you selected Party Relationship as the party type, then the Find drop-down list defaults to Business Contact.

If you selected Organization as the party type, then the Find drop-down list defaults to Organization.

4. Enter multiple search criteria in the Basic tab such as area code, phone number, or city:

You can enter letters or partial words, but you must use the % sign to indicate missing or unknown characters. For example, a search for j%n in the First name field retrieves all first names starting with the letter j and ending with the letter n, including John, Jon, and Johann.

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**Note:** Searches are sensitive to the punctuation used during entry. If someone entered 555-1212 as the phone number, then you cannot find that phone number by searching for 555 1212. You must instead search for %1212 or for 555%1212.

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5. Click **Search**.

The search results display in the Results region below.
6. If the results are not satisfactory, can modify the search criteria and repeat the search.
7. Select the individual you wish to view from the list of results.
8. Click **OK**.

The information for the individual you selected appears in the in eBusiness Center header.

## Accessing Leads, Opportunities, and Other Work from Your Work Queue

Use this procedure to access work assigned to you from your work queue. For more information about using the work queue, please see Oracle Universal Work Queue documentation.

### Prerequisites

None

### Steps

1. Click on the Work Queue button in the toolbar. This is what the button looks like:



The Universal Work Queue window appears.

The Queue pane on the left side of the window lists the categories of tasks.

2. Click on a category of tasks you wish to view in the right pane. For example, clicking on Leads displays all leads you own in a list in the right pane.
3. If you wish to search, sort, or modify the appearance of the list of tasks, see [Manipulating Data in the Work Queue and Other Dynamic Tables](#).
4. Double-click on an item you wish to work on.

The item launches in the appropriate section of the application.

For example, double-clicking on a lead launches that lead in the Lead Center.

## Manipulating Data in Your Work Queue and Other Dynamic Tables

Dynamic tables provide flexibility in displaying and handling data. Use them to track, sort, search, copy, and export data, and customize your display.

You can perform the following tasks in your Work Queue and other dynamic tables:

- [Sorting](#)

- [Finding](#)
- [Copying and exporting](#)
- [Customizing layout](#)

## Sorting Information in Dynamic Tables

Use this procedure to sort work in your work queue and other tables within Oracle TeleSales.

### Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

### Steps

1. If you wish to sort on a field in the table, click on the grey dot in the column header.  
  
The blue arrow that replaces the grey dot indicates a direction of order, for example, ascending, descending, alphabetical, or chronological order.
2. You can sort in the opposite direction by clicking the header arrow again.

## Finding Information in Dynamic Tables

Use this procedure to find information in your Work Queue and other dynamic tables in Oracle TeleSales.

### Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

### Steps

1. Right-click on any cell in the table.
2. Select **Find in Table** from the pop-up menu.
3. Type the characters wish to search on into the text field.
4. Indicate whether to match case, and select the direction of the search, backward or forward.

5. Click **Find**.
6. You can click **Cancel** to stop a long running search.

## Copying Data from Dynamic Tables

Use this procedure to copy a cell, selected rows, or all rows of data displayed in a dynamic table to the clipboard. You can then paste the data as tab-delimited text into a desktop application.

### Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

### Steps

1. Select the data you wish to copy.
2. Right-click on any cell in the table.
3. From the pop-up menu, choose the appropriate option.

When you insert the copied selection into a spreadsheet application, such as Microsoft Excel, the appropriate headers automatically migrate with the selection and appear as its first row. Rows are copied in a tab-delimited format.

### Guidelines

Cells that display values as check marks or an X, display differently when copied and exported. Positive values are expressed as asterisks (\*) and negative values do not display.

If you have customized your table to hide columns of data, these are not copied or exported.

## Customizing the Layout of Your Work Queue and Other Dynamic Tables

Use this procedure to adjust the layout of your Work Queue and other tables to accommodate your needs.

### Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

**Steps**

1. You can resize any column or row by placing your cursor at the edge of the header. When the double arrow appears, you can drag the column or row to the desired size.
2. If you wish to change the order the columns, then:
  - a. In a header, left-click and hold the mouse key down until a black box appears around the header.
  - b. Move the header to the selected position. Allow for a delay before making the move.
3. If you wish to hide a column from view, then:
  - a. Right-click the header of the column you wish to hide.
  - b. Select Hide Column on the pop-up menu.

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**Note:** Hidden information is not copied to the clipboard.

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4. If you wish to display columns which are hidden, then:
  - a. Right-click on any column header.
  - b. Choose **Show Column** from the pop-up menu.  
A list of all currently hidden columns appears.
  - c. Select all or only those columns you wish to display.
5. To preserve changes you make to the table layout:
  - a. Right-click a column header.
  - b. From the pop-up menu, choose **Customizations**.
  - c. From the submenu, choose **Save**.
6. If you wish to restore default settings:
  - a. Right-click a column header.
  - b. From the pop-up menu, choose **Customizations**
  - c. From the submenu, choose **Clear**.



# Using the eBusiness Center

The eBusiness Center is where you conduct most of your work, from entering customer information to generating leads and tracking opportunities.

For an overview of eBusiness Center layout functionality, see [An Overview of the eBusiness Center](#).

Help is available on the following user tasks:

- [Displaying and entering customers and prospects](#)
- [Using the Overview tab](#)
- [Using the Address tab](#)
- [Using the Person tab](#)
- [Using the Organization tab](#)
- [Using the Relationships tab](#)
- [Using the Accounts tab](#)
- [Using the Leads tab](#)
- [Using the Opportunity tab](#)
- [Using the Quote and Order tab](#)
- [Using the Event tab](#)
- [Using the Collateral tab](#)
- [Using the Task tab](#)

## Displaying and Entering Customers and Prospects

Help is available on the following topics relating to displaying and entering customers.

- [Performing complex searches](#)
- [Displaying a consumer, a contact, or an organization](#)
- [Checking if an organizational contact already exists in the database](#)
- [Checking if a consumer already exists in the database](#)
- [Checking if an organization already exists in the database](#)
- [Viewing all contacts at an organization](#)
- [Entering a new contact for an existing organization](#)
- [Entering a new contact at a new organization](#)
- [Entering a new consumer](#)
- [Entering a new organization](#)

## Displaying a Party in the eBusiness Center Header

You must follow slightly different procedures for displaying consumers, organizational contacts, or organizations in the eBusiness center header. Select a procedure:

- [Displaying consumers](#)
- [Displaying organizational contacts](#)
- [Displaying organizations](#)

## Displaying a Consumer in the eBusiness Center Header

Use this procedure to search for and display a consumer in the eBusiness Center header.

### **Prerequisites**

The customer or prospect must already exist in the database.

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Person.
3. If you wish to find the individual by their email, then use the Email List of Values (LOV).
4. If you wish to find the individual by their name, then use the First or Last name LOVs.
5. If you find the individual in the LOV, then click **OK** and the name and basic contact information is entered in the eBusiness Center header automatically.
6. If too many results appear for you to examine easily, then click **Cancel** to close the LOV window and [perform a complex search for the individual using multiple search criteria](#) instead.

## Displaying an Organization in the eBusiness Center Header

Use this procedure to search for and display an organization in the eBusiness Center header.

### Prerequisites

The organization must already exist in the database.

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Organization.
3. Place your cursor in the Organization field.
4. Enter CTRL+L on your keyboard and use the List of Values (LOV) to search for the name of the organization.
5. If you find the organization in the LOV, then click **OK** and the organization information is entered in the eBusiness Center header automatically.
6. If too many results appear, then click **Cancel** to close the LOV window and [perform a complex search for the organization using multiple search criteria](#) instead.

## Displaying an Organizational Contact in the eBusiness Center Header

Use this procedure to search for and display an organizational contact in the eBusiness Center header.

### Prerequisites

The relationship must already exist in the database.

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Party Relationship.
3. Use the Organization List of Values (LOV) to enter the organization.
4. Use the Email, First, or Last name LOV to search for and enter the individual.

## Checking if an Organizational Contact Already Exists in the Database

Use this procedure to check for duplicate organizational contacts before you make a new entry into the database.

### Prerequisites

None

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list in the header, select Party Relationship.
3. Search for the contact's organization using the Organization List of Values (LOV).
4. If the organization does not exist in the database, then click **Cancel** in the LOV window and proceed with the new contact entry in the eBusiness Center.
5. If the contact's organization is listed in the Organization LOV, then:
  - a. Enter the Organization.
  - b. Place your cursor in the First or Last Name fields.
  - c. Select CTRL+L on your keyboard and use the List of Values to search for the name.

- d. If a duplicate is not listed in the results of your search, then click **Cancel** to return to the eBusiness center where you can make your new entry.
- e. If you find the individual in the search results, then click **OK** and the name is entered in the eBusiness Center automatically.
- f. If too many results appear for you to examine easily, then click **Cancel** to close the LOV window and [perform a complex search for the individual using multiple search criteria](#) instead.

## Checking to See If a Consumer Already Exists in the Database

Use this procedure to check if a consumer you are about to enter exists in the database. This prevents duplicate entries into your database.

### Prerequisites

None

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Person.
3. Use the Email, First name, or Last name fields List of Values (LOV) to search for the individual.
4. If you do not find the individual in the LOV, then click **Cancel** to close the LOV window.
5. If too many results appear for you to examine easily, then click **Cancel** to close the LOV window and [perform a complex search for the individual using multiple search criteria](#) instead.

## Checking if an Organization Already Exists in the Database

Use this procedure to check to see if an organization is already in the database before you add it.

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Organization.

3. Place your cursor in the Organization field.
4. Select CTRL+L on your keyboard and use the List of Values to search for the organization name.
5. If the organization is not listed in the results of your search, then click **Cancel** to return to the eBusiness center where you can make your new entry.
6. If you find the organization in the search results, then click **OK** and the name is entered in the eBusiness center automatically.

## Viewing All Contacts at an Organization

Use this procedure to view all of the contacts at an organization.

### Prerequisites

None

### Steps

1. If the eBusiness Center is blank or does not display the correct organization, then:
  - a. From the Party Type drop-down list, select Party Relationship.
  - b. Use the Organization List of Values (LOV) to select the organization.
  - c. Use the First or Last field LOV to view the list of contacts at the organization. You can search on partial names provided you use the wild card % to indicate missing letters.
2. If the eBusiness Center header displays the correct organization and Organization is selected from the Party Type drop-down list, then:
  - a. In the View Details for region, select the button labeled with the name of the organization.
  - b. Select the Relationships tab.
  - c. The Object Relationship region displays the contacts for the organization.
  - d. If you wish to view or modify the details of any of the contacts, then select one by clicking on the drill-down button to the left of the record you wish to view. The drill-down button is the unlabeled blue button all the way to the left of the record.

3. If the eBusiness Center header displays the correct organization and Party Relationship is selected from the Party Type drop-down list, then use the First or Last LOVs to display the list of contacts at the organization.

## Entering a New Contact for an Existing Organization

Use this procedure to enter a new contact at an existing organization.

### Prerequisites

[Check to see if the contact already exists at the organization](#) to prevent duplicate entries.

### Steps

1. Navigate to the eBusiness center.
2. [Display the organization in the eBusiness Center header.](#)
3. From the Party Type drop-down list, select Party Relationship.
4. Click **Create**.

The New Party dialog box appears.

5. Click **Person**.
6. Enter the individual's title.
7. Enter the individual's first and last name. The middle initial is optional.
8. Use the Relation LOV to select the relationship between the contact and the organization.
9. Optionally, enter a primary address, phone number, and email.

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**Note:** If you wish to send electronic collateral to this individual, then you must enter the email address under the party type of Person. This is because the collateral tab in this release uses email addresses entered for the party type of Person (the consumer) and not the Party Relationship (organizational contact).

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10. If the Organization field is blank or does not display the correct organization, use the List of Values (LOV) to enter the individual's organization.
11. Enter CTRL+S on your keyboard or click **Save** on the toolbar.

You are now ready to perform different tasks in the eBusiness Center tabs, including:

- Entering a billing, shipping and other addresses for the contact. Billing and shipping addresses are required if your customer is making a purchase.
- Entering phone numbers and e-mail addresses.
- Entering personal details about the contact in the person tab.

## Entering a New Contact at a New Organization

Use this procedure to enter a new contact at a new organization

### Prerequisites

[Check to make sure the contact does not already exist in the database](#) to prevent duplicate entries.

### Steps

1. Navigate to the eBusiness center.
2. From the Party Type drop-down list, select Party Relationship.
3. Click **Create**.  
The New Party dialog box appears.
4. Click **Both**.
5. Use the Organization List of Values (LOV) to check if the organization does not already exist in the database.
6. Enter the organization name.
7. Select a title for the contact.
8. Enter the contact's name.
9. If you wish to change the default relationship for the contact, then use the Relationship LOV to select a different one.
10. Enter the contact's primary phone number in four separate fields: the country code, the calling area code, the phone number itself, the extension if any.
11. Using the Type drop-down list, select the phone number type.
12. Enter the contact's email address.

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**Note 1:** The phone number and email you enter here is tied to the contact and not the organization.

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**Note 2:** If you wish to send electronic collateral to this individual, then you must enter the email address under the party type of Person. This is because the collateral tab in this release uses the email addresses entered in the party type of person (the consumer) and not the party relationship (organizational contact).

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13. Enter the contact's primary address. If you need additional address lines, then click the ellipsis button. The address you enter here is the primary address for the contact and appears whenever you display the contact in the eBusiness Center header.

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**Note:** By default, the address you enter here for the contact automatically becomes an address for the organization as well. Your application administrator can disable this feature by resetting the profile option OTS: ASSOCIATE RELATIONSHIP LOCATION TO ORGANIZATION to no.

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14. Click **Save** on the toolbar.

You are now ready to perform different tasks in the eBusiness Center tabs. You can:

- Enter details about the contact's organization
- Designate different uses for the address you entered. You may want to designate the same address as shipping and billing, for instance.
- Enter other addresses, including billing and shipping, for the organization or the contact.

### Guidelines

You may wish to enter only the contact name and organization in the eBusiness center header and enter other information, including email, phone, and address, in the eBusiness Center tabs. Use the header to enter only the primary contact information. The tabs below allow you to enter multiple addresses, phone numbers, email addresses, and URLs.

## Entering a New Consumer

Use this procedure to enter a new consumer.

### Prerequisites

[Check to make sure the consumer does not already exist in the database](#) to prevent duplicate entries.

### Steps

1. Navigate to the eBusiness center.
2. From the Party Type drop-down list, select Person.
3. Click **Create**.
4. From the Title drop-down list, select a title for the consumer.
5. Enter the consumer's name.
6. Enter the consumer's primary phone number in four separate fields: the country code, the calling area code, the phone number itself, the extension if any.
7. Using the Type drop-down list, select the phone number type.
8. Enter the consumer's primary email address.
9. Enter the contact's primary mailing address. If you need additional address lines, then click the ellipsis button. The address you enter here appears whenever this consumer is displayed in the eBusiness Center header.
10. Click **Save** on the toolbar.

You are now ready to:

- Enter details about the consumer
- Designate different uses for the address you entered. You may want to designate the same address as shipping and billing, for instance.
- Enter other addresses, including billing and shipping, for the consumer.

### Guidelines

You may wish to enter only the consumer name in the eBusiness center header and enter other information, including email, phone, and address, in the eBusiness Center tabs. Use the header to enter only the primary contact information. The tabs

below allow you to enter multiple addresses, phone numbers, email addresses, and URLs.

## Entering a New Organization

Use this procedure to create a new organization.

### Prerequisites

None

### Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Organization.
3. Use the Organization List of Values (LOV) to check if the organization does not already exist in the database.
4. Enter the organization's name.
5. Enter the organization's primary phone number in four separate fields: the country code, the calling area code, the phone number itself, the extension if any.
6. Using the Type drop-down list, select the phone number type.
7. Enter the organization's primary email address.

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**Note:** The phone number and email you enter here is tied to the organization and does not appear when you are viewing contacts for the organization.

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8. Enter the organization's primary address. If you need additional address lines, then click the ellipsis button. The address you enter here is the primary address for the organization and appears whenever you display the organization as party type of organization.
9. Click **Save** on the toolbar.

You are now ready to:

- [Enter other phone numbers, email, and URLs for the organization.](#)
- Enter other details about the organization.

## Using the Overview Tab

Use the Overview tab of the eBusiness Center to view notes and interactions your organization has had with the customer, to enter notes of your own, and to enter the campaign the customer is calling about. A campaign is required for sending collateral and enrolling contacts.

You can obtain help on the following:

- [Entering the campaign and offer for the call](#)
- [Searching for a campaign when you do not know its name](#)
- [Launching a script for your customer interaction](#)
- [Entering notes](#)
- [Viewing the most recent notes](#)
- [Viewing all notes entered on a customer](#)
- [Searching for text within notes](#)
- [Viewing the most recent interactions](#)

## Entering the Campaign and Offer for the Call

Use this procedure to enter the campaign and offer for the call. You must enter a campaign before preparing quotes or launching scripts.

### Prerequisites

Display the party in the eBusiness Center header and select the appropriate party in the View Details for region.

### Steps

1. Select the Overview tab.
2. If the caller does not know the campaign name, then click **Search Campaign** and [search for the campaign using other criteria such as the campaign code or the medium where the campaign is run](#).
3. If the caller knows the campaign name, then enter it using the Campaign List of Values.
4. Optionally, use the Offer LOV to enter the offer.
5. Click **Save** on the toolbar or press CTRL+S on your keyboard.

You are now ready to:

- Launch a script
- Create a lead

## Searching for a Campaign When You Do Not Know Its Name

Use this procedure to search for a campaign for a customer or prospect using any number of search criteria. This includes the campaign code, the dates of a campaign, or the medium in which the campaign is run.

### Prerequisites

You must first display the customer or prospect in the eBusiness header and select the appropriate party in the View Details For region.

### Steps

1. In the eBusiness Center, select the Overview tab.

2. Click **Search Campaign**.

The Universal Search window appears.

3. Enter one or more search criteria in the Basic tab.

You can enter partial words if you are not sure of a spelling but you must use the wild card % to indicate missing or unknown letters.

4. Click **Search**.

The search results display in the Results region below.

5. If the results are not satisfactory, can modify the search criteria and repeat the search.

6. Select the campaign from the list of results.

7. Click **OK**.

The campaign appears in the Overview tab.

## Launching a Script for Your Customer Interaction

Use this procedure to launch a script to guide you in your interaction with a customer or prospect.

### Prerequisites

You must display the customer or prospect in the eBusiness header and select the appropriate party in the View Details For region.

### Steps

1. In the eBusiness Center, select the Overview tab.
2. If the caller knows the name of the campaign, then enter it using the Campaign List of Values.
3. If the caller does not know the campaign name, then click **Search Campaign** and [search for the campaign using other criteria, such as the campaign code or the medium where the campaign is run](#).
4. If the View Script button is enabled, click on it to launch the script.
5. If the View Script button is disabled, this means no specific script has been associated with this campaign. In this case, you may wish to view a list of all of the available scripts:
  - a. Click **All Scripts**.  
The Agent Scripts window appears.
  - b. If an appropriate script is available, then select the script and click **View Script** to launch the script.
  - c. If no appropriate script is listed, then click **Close**.

## Entering Notes on a Customer

Use this procedure to take notes on a consumer, organization, and a business contact. You must remember that the notes you save are linked to the party you have chosen using the radio buttons in the View Details For region.

### Prerequisites

You must [display a party in the eBusiness Center header](#) and select a radio button in the View Details For region corresponding to the party you wish to enter notes for.

### Steps

1. In the eBusiness Center, select the Overview tab.
2. Enter the note in the New Note text box.

3. Click **Save** on the toolbar.

The note remains editable as long as you do not change parties or exit the application.

4. If you wish to create a second note, then:
  - a. Place your cursor in the New Note text box.
  - b. Click **New** in the toolbar. This is the button with a green plus sign.
  - c. Enter the note and click **Save**.

### Guidelines

Notes are linked to the entity where you create them. If you wish to enter notes on a lead, then enter it in the leads tab. (See [Entering Notes on a Lead](#).) If you wish to enter notes on an opportunity, then enter it in the Opportunity tab. (See [Entering Notes for an Opportunity](#).)

### References

[About Notes](#)

## Viewing the Most Recent Notes

Use this procedure to view notes on a consumer, organization, or an organizational contact.

### Prerequisites

You must [display the party in the eBusiness Center header](#) and select a radio button in the View Details For region corresponding to the party you wish to view notes for.

### Steps

1. In the eBusiness Center, select the Overview tab.
2. In the Interaction History region, select Notes from the View drop-down list.

The most recent notes for the contact appear below.
3. If the full text of the note is not visible, then place your cursor over the note text to view the full text in a tool-tip window. You can also expand the row by dragging the bottom of the selection field on the left.

4. If you wish to view all of the notes for the party, then click **All Notes**. See [Viewing All Notes on a Customer](#) for details.

## References

[About Notes](#)

## Viewing All Notes on a Customer

Use this procedure to view the notes entered for a consumer, an organization, or an organizational contact.

### Prerequisites

You must [display the party in the eBusiness Center header](#).

### Steps

1. In the eBusiness Center, select a radio button in the View Details For region corresponding to the party you wish to view notes for.
2. From the Tools menu, choose All Notes or click the All Notes button.  
The Notes window appears.
3. Enter the filtering criteria for the notes you wish to see:
  - a. If you wish to see all of the notes for an organization, its leads, and its opportunities, then make sure the check box labeled with the name of the organization is selected. Leave the other fields blank.

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**Note:** If you are viewing information for the party of Person, then the organization check box is disabled.

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- b. If you wish to view notes for a specific individual, then enter that individual in the Person field using the List of Values (LOV). If you are viewing notes on a consumer, then this field is prefilled for you.
  - c. If you wish to view only the leads or opportunities for the organization or individual you have selected above, then use the Related To LOV to specify which you wish to see.
4. Click **Find**.

The left pane lists all of the notes that meet your search criteria sorted by the date they were entered.

5. To see the full text of the note, select the note you wish to view on the left. The text is displayed on the right.
6. You can sort notes by clicking on different column headings in the Notes tab list.
7. If you wish to filter the notes displayed in the list by object type, for example, to view only notes for opportunities, then:
  - a. In the Filter By region, use the Related To LOV to enter the object type.
  - b. Optionally, select a value using the Value LOV.
  - c. Click **Find**.

## References

[Searching for Text Within Notes](#)

[About Notes](#)

## Searching for Text Within Notes

Use this procedure to find text in notes listed in a table.

### Prerequisites

You can only perform this procedure within any table listing notes, such as the Notes table in the Overview tab of the eBusiness Center or the listing of notes in the Notes window.

### Steps

1. Right-click on any cell in the table.
2. Select **Find in Table** from the pop-up menu.
3. Type the characters wish to search on into the text field.
4. Indicate whether to match case, and select the direction of the search, backward or forward.
5. Click **Find**.

The application highlights the record containing the first instance of your search term.

6. You can click **Cancel** to stop a long running search.

## References

[About Notes](#)

## Viewing the Most Recent Interactions for a Party

Use this procedure to view the most recent interactions your organization has had with a consumer, organization, or an organizational contact. Interactions track all contacts made in the eBusiness suite of applications between agents of your organization and the party.

### Prerequisites

You must [display the party in the eBusiness Center header](#).

### Steps

1. In the eBusiness Center, select a radio button in the View Details For region corresponding to the party you wish to view interactions for.
2. Select the Overview tab.
3. In the Interaction History region, select Interactions from the View drop-down list.

The most recent interactions for the contact appear below.

4. If the full text of the interaction is not visible, then place your cursor over the note text to view the full text in a tool-tip window. You can also expand the row by dragging the bottom of the selection field on the left.
5. If you wish to view all of interactions for the party, then click **All Interactions**. See Interaction History documentation in *Oracle CRM Foundation Concepts and Procedures* for details.

## Using the Address Tab

Use the Address tab of the eBusiness Center to enter addresses and specify their uses. You can obtain help on the following procedures:

- [Entering an address](#)
- [Entering an address for a contact at an organization](#)
- [Entering an address for an organization](#)
- [Entering an address for a consumer](#)
- [Specifying uses for an address](#)

### Entering an Address

Use this procedure to enter an address.

#### Prerequisites

The party for which you wish to enter an address must already be in the database.

#### Steps

1. Enter an address. The procedures for entering addresses for organizations, consumers and contacts for an organization are slightly different, so select the appropriate party below:
  - [Contact at an organization.](#)
  - [Consumer](#)
  - [Organization](#)
2. [Select the uses for the address, such as billing and shipping.](#)

### Entering an Address for a Contact at an Organization

Use this procedure to enter an address for a contact at an organization. If you are entering a private address, then you must enter it under the party type of person. If you are entering a business address, then enter it under the party type of party relationship.

A party can have multiple addresses, but only one primary address. The primary address is the one that appears in the eBusiness Center header when you display the party.

## Prerequisites

Display the contact at an organization in the eBusiness Center header.

## Steps

1. If you are entering a private address then, in the View Details For region, select a radio button labeled with the name of the person. This is the first button from the left.

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**Note:** This radio button is disabled if the header displays information on an organization.

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2. If you are entering an address tied to the contact's role in an organization, then, in the View Details For region, select a radio button labeled with the name of the person and the organization. This is the third button from the left.

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**Note:** This radio button is disabled if the header displays information on either the party type of organization or person.

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3. Select the Address tab.
4. In a blank line, enter the street address in the Address 1 field.
5. If you need additional address lines, then:
  - a. Click the ellipsis button to the right of the Address 1 field.
  - b. The Address Information window appears.
  - c. Enter up to three more address lines.
  - d. Click **OK**.
6. Enter other address information. City, state, postal code, and country are required. Province and county are optional fields.
7. If the address is the primary address for the contact, then select the Primary check box.

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**Note:** You can only have one primary address for a contact

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8. Specify the different uses using the Address Usage column. A single address can have multiple uses, as the shipping and billing address, for example:
  - a. Use the Address Usage field LOV to specify a use for this address.
  - b. To specify additional uses, select a new line and repeat the previous step.

### Guidelines

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**Note:** By default, an address you enter for a contact at an organization (party of type party relationship) automatically becomes 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. This feature can be turned off by your application administrator by resetting the profile option OTS: ASSOCIATE RELATIONSHIP LOCATION TO ORGANIZATION to no.

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## Entering an Address for an Organization

Use this procedure to enter an address for an organization. You can enter an address for an organization when the eBusiness Center header displays either a party type of organization or party type of party relationship.

An organization can have multiple addresses, but only one primary address. The primary address is the one that appears in the eBusiness Center header when you display a party type of organization.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. In the View Details For region, select a radio button labeled with the name of the organization. This is the second button from the left.

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**Note:** This radio button is disabled if the header displays information on a consumer (the party type of person).

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2. Select the Address tab.

3. In a blank line, enter the street address in the Address 1 field.
4. If you need additional address lines, then:
  - a. Click the ellipsis button to the right of the Address 1 field.
  - b. The Address Information window appears.
  - c. Enter up to three more address lines.
  - d. Click **OK**.
5. Enter other address information. City, state, postal code, and country are required. Province and county are optional fields.
6. If the address is the primary address for the contact, then select the Primary check box.

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**Note:** You can only have one primary address for the organization.

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7. Specify the different uses using the Address Usage column. A single address can have multiple uses, as the shipping and billing address, for example:
  - a. Use the Address Usage field LOV to specify a use for this address.
  - b. For specify additional uses, select a new line and repeat the previous step.

## Entering an Address for a Consumer

Use this procedure to enter an address for a consumer. A consumer can have multiple addresses, but only one primary address. The primary address is the one that appears in the eBusiness Center header when you display a party type of person.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. In the View Details For region, select a radio button labeled with the individual's name. This is the first button from the left.

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**Note:** This radio button is disabled if the header displays information on an organization (the party type of organization).

---

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2. Select the Address tab.
3. In a blank line, enter the street address in the Address 1 field.
4. If you need additional address lines, then:
  - a. Click the ellipsis button to the right of the Address 1 field.
  - b. The Address Information window appears.
  - c. Enter up to three more address lines.
  - d. Click **OK**.
5. Enter other address information. City, state, postal code, and country are required. Province and county are optional fields.
6. If the address is the primary address for the consumer, then select the Primary check box.

---

---

**Note:** You can only have one primary address for a consumer.

---

---

7. Specify the different uses using the Address Usage column. A single address can have multiple uses, as the shipping and billing address, for example:
  - a. Use the Address Usage field LOV to specify a use for this address.
  - b. For specify additional uses, select a new line and repeat the previous step.

## Specifying Multiple Uses for an Address

Use this procedure to specify multiple different uses for an address. For example, use this procedure to specify a single address to be the home, the billing, and the shipping address.

### Prerequisites

[Display the party in the eBusiness Center header](#) and select the appropriate party in the View Details for region.

### Steps

1. Select the Address tab.
2. Select the address. You can do so by either clicking in any address field or on the select button all the way to the left.
3. Place the cursor in a blank Address Type field and use the List of Values specify a use for this address.
4. Repeat the last step for any additional uses for this address. A single address can have multiple entries in the Address Type column.
5. Click **Save** on the toolbar.

### Guidelines

See [About the Address Tab](#) for an example.

## Using the Person Tab

Use the Person tab in the eBusiness Center to enter information about a consumer or personal details about a contact at an organization.

You can obtain help on:

- [Entering phone, email, and URLs for a consumer](#)
- [Entering phone, email, and URLs for an organizational contact](#)
- [Entering name pronunciation, language and other details](#)
- [Entering details about a person's educational background](#)
- [Entering details about a person's product interest](#)
- [Entering details about a person's employment and military history](#)
- [Entering details about an individual's personal interests](#)
- [Specifying a sales team for an individual contact or consumer](#)
- [Restricting interactions with organizational contacts](#)
- [Restricting interactions with consumers](#)

---

---

**Note:** This tab is disabled if you select the radio button labeled with the name of the organization from the View Details For region.

---

---

## Entering Phone, Email, and URLs for a Consumer

Use this procedure to enter phone numbers, email addresses, and URLs for an individual consumer.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. In the View Details For region, select a radio button labeled with the person's name. This is the first radio button from the left.  

---

---

**Note:** This radio button is disabled if the header displays information on an organization.

---

---
2. Select the Person tab.
3. From the Display drop-down list, select Contact Points.
4. Use the Contact Method LOV select the information type that you wish to enter.
5. If you are entering a phone number, then:
  - a. Use the Type LOV to select the phone type.
  - b. Enter the phone number in the three Value fields: international code, area code, phone number. Be sure to use a standard format for your entries. Searches on phone numbers are sensitive to punctuation such as dashes or spaces.
  - c. Enter an extension if any.
  - d. Optionally, suggest a time this number can used by making entries in the Best Time From and Best Time To fields.
  - e. If this phone number is the primary phone number which is to appear in the eBusiness Center header, then select the Primary check box.

---

---

**Note:** A consumer can have only one primary phone number.

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---
6. If you are entering an email address, then:
  - a. Enter the email in the last of the three Value fields.



3. From the Display drop-down list, select Contact Points.
4. Use the Contact Method LOV to select the information type that you wish to enter.
5. If you are entering a phone number, then:
  - a. Select phone from the Contact Method LOV.
  - b. Use the Type LOV to select the phone type.
  - c. Enter the phone number in the three Value fields: international code, area code, phone number. Be sure to use a standard format for your entries. Searches on phone numbers are sensitive to punctuation such as dashes or spaces.
  - d. Enter an extension if any.
  - e. Optionally, suggest a time this number can be used by making entries in the Best Time From and Best Time To fields.
  - f. If this phone number is the primary phone number which is to appear in the eBusiness Center header, then select the Primary check box.

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---

**Note:** A contact can have only one primary phone number.

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---

6. If you are entering an email address, then:
  - a. Select email from the Contact Method LOV.
  - b. Enter the email in the last of the three Value fields.
  - c. If this email is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

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---

**Note:** A contact can have only one primary email address.

---

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7. If you are entering a URL, then:
  - a. Select web from the Contact Method LOV.
  - b. Enter the URL in the last of the three Value fields.
  - c. If this URL is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

---

---

**Note:** A contact can have only one primary URL.

---

---

8. Click **Save** on the toolbar.

## Using the Person Details Window

You can obtain help on the following procedures in this window:

- [Entering details about a person's educational background](#)
- [Entering details about a person's product interest](#)
- [Entering details about a person's employment and military history](#)
- [Entering details about a person's personal interests](#)
- [Specifying a sales team for a consumer](#)

## Entering Details About a Person's Educational Background

Use this procedure to enter details about the educational background of a consumer or organizational contact. The information you enter here is stored with the party of type person.

### Prerequisites

Display the consumer or the organizational contact in the eBusiness Center header.

### Steps

1. In the View Details For region, select a radio button labeled with the individual's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on an organization (the party type of organization).

---

---

2. Select **Person** tab.
3. Click **Details**.  
The Person Details window appears.
4. Select the Education tab.

5. You can enter multiple schools and courses of study. For each entry:
  - a. Place your cursor in the School field.
  - b. Click **New**.
  - c. Enter the school name and other details about the individual's education in the fields provided.
  - d. Click **Save** on the toolbar.

---

---

**Note:** The list is not refreshed automatically, so your entry does not appear in the list until the next time you select this tab or open this window.

---

---

6. When you are done, select another tab or click **Cancel** to close the Person Details window.

## Entering Details About a Person's Product Interest

Use this procedure to enter details about the product interests for a consumer or an organizational contact. The information you enter here is stored with the party of type person.

### Prerequisites

Display the consumer or the organizational contact in the eBusiness Center header.

### Steps

1. In the View Details For region, select a radio button labeled with the individual's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on an organization (the party type of organization).

---

---

2. Select **Person** tab.
3. Click **Details**.  
The Person Details window appears.
4. Select the Product Interest tab.

5. You can enter multiple product interests. For each entry:
  - a. Place your cursor in the Type, Primary, or Secondary fields.
  - b. Click **New**.
  - c. Enter the product interest using the List of Values provided.
  - d. Click **Save** on the toolbar.

---

---

**Note:** The list is not refreshed automatically, so your entry does not appear in the list until the next time you select this tab or open this window.

---

---

6. When you are done, select another tab or click **Cancel** to close the Person Details window.

## Entering Details About a Person's Employment and Military History

Use this procedure to enter details about the person's employment and military service history for a consumer or an organizational contact. The information you enter here is stored with the party of type person.

### Prerequisites

Display the consumer or the organizational contact in the eBusiness Center header.

### Steps

1. In the View Details For region, select a radio button labeled with the individual's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on an organization (the party type of organization).

---

---

2. Select **Person** tab.
3. Click **Details**.  
The Person Details window appears.
4. Select the Job/Military History tab.
5. You can enter multiple jobs or positions. For each entry:

- a. Place your cursor in any of the entry fields in the bottom half of the tab.
- b. Click **New**.
- c. Enter the job or military history in the fields provided.
- d. Click **Save** on the toolbar.

---

---

**Note:** The list is not refreshed automatically, so your entry does not appear in the list until the next time you select this tab or open this window.

---

---

6. When you are done, select another tab or click **Cancel** to close the Person Details window.

## Entering Details About an Individual's Personal Interests

Use this procedure to enter details about an individual's personal interests. The information you enter here is stored with the party of type person.

### Prerequisites

Display the consumer or the organizational contact in the eBusiness Center header.

### Steps

1. In the View Details For region, select a radio button labeled with the individual's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on an organization (the party type of organization).

---

---

2. Select **Person** tab.
3. Click **Details**.  
The Person Details window appears.
4. Select the Personal Interest tab.
5. You can enter multiple interests. For each entry:
  - a. Place your cursor in any of the entry fields in the bottom half of the tab.

- b. Click **New**.
- c. Enter the interests using the fields provided.
- d. Click **Save** on the toolbar.

---

---

**Note:** The list is not refreshed automatically, so your entry does not appear in the list until the next time you select this tab or open this window.

---

---

6. When you are done, select another tab or click **Cancel** to close the Person Details window.

## Specifying a Sales Team for a Consumer

Use this procedure to select sales team members for a consumer. In most implementations, sales team members are assigned automatically to an organization by the CRM Territory Management module. However, you can use this procedure to over-ride this assignment or assign additional team members of your own.

### Prerequisites

You must display the consumer or a contact at an organization in the eBusiness Center header.

### Steps

1. In the View Details For region of the eBusiness Center, select the radio button labeled with the individual's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on a organization (the party type of organization).

---

---

2. Select the Person tab.
3. Click **Details**.  
The Person Details window appears.
4. Select the Sales Team tab.
5. You can add multiple sales team members and partners to the sales team. For each member:

- a. If you wish to select a partner for the sales team, then, from the Display drop-down list, select Partner. The selection is Employee by default.
- b. Place your cursor in the Name field. It does not matter if this field is blank or displays a name.
- c. Click **New**.
- d. Use the Name List of Values (LOV) to select a sales team member.
- e. If you wish this individual to have view-only access to all opportunities and leads for this customer regardless of whether they are on the sales team for that opportunity or are assigned a lead, then use the Role LOVs to assign the role of Account Manager.

---

---

**Note:** The role you assign here is different from the group and role you select for reporting purposes.

---

---

- f. If you wish to keep the new team member on the team regardless of the assignment made by the territory management module, then select the Freeze check box.

---

---

**Note:** The Team Leader check box is no longer used in this release.

---

---

- g. Click **Save** on the toolbar.

---

---

**Note:** The list of team members is not refreshed automatically, so your entry does not appear in the list until the next time you select this tab or open this window.

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---

6. When you are done, select another tab or click **Cancel** to close the Person Details window.

## Entering Name Pronunciation, Language, and Other Personal Details

Use this procedure to enter the pronunciation of a person's name and other personal information for a consumer and organizational contact. You can enter a division and manager information for an organizational contact, but not for a consumer. All fields are optional.

## Prerequisites

Display the organizational contact in the eBusiness Center header.

## Steps

1. In the View Details For region, select a radio button labeled with the name of the person and the organization. This is the third button from the left.

---



---

**Note:** This radio button is disabled if the header displays information on either the party type of organization or person.

---



---

2. Select the Person tab.
3. Make entries in the fields provided. If you are entering a consumer, then the organization-related fields are disabled.
4. Click **Save** in the toolbar.
5. If you wish to add details such as the contact's interests and educational history or modify the sales team assigned to this contact, then click **Details** and follow one of the procedures below:
  - [Entering details about a person's educational background](#)
  - [Entering details about a person's product interest](#)
  - [Entering details about a person's employment and military history](#)
  - [Entering details about a person's personal interests](#)
  - [Specifying a sales team for an individual contact or consumer](#)

## Guidelines

The table below gives guidelines for entry in some of the available fields:

Field/Box	Explanation
Alias	A free-text field where you can enter any other names this individual is known by.
Suffix	A free-text field for honorific titles.
Native Language	List of Values (LOV).

Field/Box	Explanation
Job Title	A free-text field for the individual's job title. Because job titles vary, you may wish to classify the job title using the Job Title Type LOV
Job Title Type	List of Values you can use to classify the job title you entered.
Department	Free-text field for entering the actual department name.
Department Type	Classification of the department name.

## Restricting Interactions with Organizational Contacts

Use this procedure to restrict your organization's interactions via email or phone with organizational contacts. You may want to use this procedure if a contact is away on vacation, for example, or does not want to be contacted by telephone.

### Prerequisites

[Display the organizational contact in the eBusiness Center header.](#)

### Steps

1. In the View Details For region, select a radio button labeled with the name of the person and the organization. This is the third button from the left.

---



---

**Note:** This radio button is disabled if the header displays information on either the party type of organization or person.

---



---

2. Select the Person tab.
3. From the Display drop-down list, select Restrictions.
4. Enter one or more restrictions on your company's interaction with the contact:
  - a. Use the Restriction List of Values (LOV) to specify the type of contact you wish to restrict.
  - b. Enter a period for the restriction. If you do not enter an end date, then the restriction remains in effect indefinitely.
  - c. Use the Reason LOV to enter a reason.
5. Click **Save** on the toolbar to save your work.

## Restricting Interactions with consumers

Use this procedure to restrict your organization's interactions with consumers. You will want to use this procedure to indicate a person is away on vacation, for example, or does not want to be phoned at dinner time.

### Prerequisites

[Display the consumer in the eBusiness Center header.](#)

### Steps

1. In the View Details For region, select a radio button labeled with the person's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on a party type of organization.

---

---

2. Select the Person tab.
3. From the Display drop-down list, select Restrictions.
4. Enter one or more restrictions on your company's interaction with the individual:
  - a. Use the Restriction List of Values (LOV) to specify the type of contact you wish to restrict.
  - b. Enter a period for the restriction. If you do not enter an end date, then the restriction remains in effect indefinitely.
  - c. Use the Reason LOV to enter a reason.
5. Click **Save** on the toolbar to save your work.

## Using the Organization Tab

Use the Organization tab of the eBusiness Center to enter details about an organization.

You can obtain help on:

- [Entering phone, email, and URL information for an organization](#)
- [Entering revenue, fiscal year, and other organization details](#)
- [Viewing an organization's products under service contracts](#)
- [Classifying an organization by purchase interests](#)
- [Selecting sales team members for an organization](#)

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---

**Note:** This tab is disabled if you select the radio button labeled with the name of the person in the View Details For region.

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## Entering Phone, Email, and URL Information for an Organization

Use this procedure to enter phone numbers, email addresses, and URLs for an organization.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. In the View Details For region, select the radio button labeled with the name of the organization.

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---

**Note:** This radio button is disabled if the header displays information on a party type of Person.

---

---

2. Select the Organization tab.
3. In a the Contact Points region, use the Contact Method LOV select the information type that you wish to enter.
4. If you are entering a phone number, then:
  - a. Use the Type LOV to select the phone type.

- b. Enter the phone number in the three Value fields: international code, area code, phone number. Be sure to use a standard format for your entries. Searches on phone numbers are sensitive to punctuation such as dashes or spaces.
- c. Enter an extension if any.
- d. Optionally, suggest a time this number can be used by making entries in the Best Time From and Best Time To fields.
- e. If this phone number is the primary phone number which is to appear in the eBusiness Center header, then select the Primary check box.

---

---

**Note:** An organization can have only one primary phone number.

---

---

- 5. If you are entering an email address, then:
  - a. Enter the email in the last of the three Value fields.
  - b. If this email is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

---

---

**Note:** An organization can have only one primary email address.

---

---

- 6. If you are entering a URL, then:
  - a. Enter the URL in the last of the three Value fields.
  - b. If this URL is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

---

---

**Note:** An organization can have only one primary URL.

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- 7. Click **Save** on the toolbar.

## Entering Revenue, Fiscal Year, and Other Organization Details

Use this procedure to enter information about an organization. This includes, purchase interests and information on the fiscal year and revenue.

## Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

## Steps

1. In the View Details For region, select a radio button labeled with the name of the organization. This is the second button from the left.

---



---

**Note:** This radio button is disabled if the header displays information on a consumer (the party type of person).

---



---

2. Select the Organization tab.
3. In the Organization Focus region, enter information about the company. See the Guidelines section below for information on specific fields.
4. Click **Save** on the toolbar.
5. If you wish to enter a sales team for the organization or classify the organization according to product interest, then click **Details** and follow the procedures for:
  - [Classifying an organization by purchase interests](#)
  - [Selecting sales team members for an organization](#)

## Guidelines

The table below explains some of the available fields in the Organization Focus region.

Field/Box	Explanation
Alias	A free-text field where you can enter any other names this organization is known by.
Business Line	A free-text field for classifying the organization's line of business.
Customer Category	List of Values used to categorize the organization. This is specified by your implementation team.
Tax ID	Tax identification for the organization.
DUNS Number	Nine-digit Dun & Bradstreet number for the organization

Field/Box	Explanation
Projected Revenue	Projected revenue for the organization
Rating	This is a read-only field
Internal radio button	Indicates the organization is an internal customer.
External radio button	Indicates the organization is an external customer.
Inactive	This check box must be unselected. Select this check box only to indicate the organization is no longer a customer or prospect
Prospect	This read-only check box is selected only if the organization has made a purchase.

## Using the Organization Details Window

You can obtain help on the following topics:

- [Viewing an organization's products under service contracts](#)
- [Classifying an organization by purchase interests](#)
- [Selecting sales team members for an organization](#)

## Viewing an Organization's Products Under Service Contracts

Use this procedure to view the installed base of products under service contracts at an organization.

### Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

### Steps

1. In the View Details For region of the eBusiness Center region, select the radio button labeled with the name of the organization. This is the second button from the left.

---



---

**Note:** This radio button is disabled if the header displays information on a consumer (the party type of person).

---



---

2. Select the Organization tab.
3. Click **Details**.  
The Organization Details window appears.
4. Select the Install Base tab to view the products under a service contract.

## Classifying an Organization by Purchase Interests

Use this procedure to classify an organization according to purchase interest categories. Purchase interest categories are broken up into interest types, primary interests, and secondary interests.

### Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

### Steps

1. In the View Details For region of the eBusiness Center, select a radio button labeled with the name of the organization. This is the second button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on a consumer (the party type of person).

---

---

2. Select the Organization tab.
3. Click **Details**.  
The Organization Details window appears.
4. Select the Classification tab.
5. Use the Interest Type, Primary Interest, and Secondary Interest List of Values (LOV) to classify the organization's interest in your products.
6. Optionally, use the Address 1 LOV to enter an address for the site with those purchase interests.
7. Click **New** to save your work.

## Selecting Sales Team Members for an Organization

Use this procedure to select sales team members for an organization. In most implementations, sales team members are assigned automatically to an organization by the CRM Territory Assignment module. However, you can use this procedure to over-ride this assignment or assign additional team members of your own.

### Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

### Steps

1. In the View Details For region of the eBusiness Center, select a radio button labeled with the name of the organization. This is the second button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on a consumer (the party type of person).

---

---

2. Select the Organization tab.
3. Click **Details**.  
The Organization Details window appears.
4. Select the Sales Team tab.
5. You can add multiple sales team members and partners to the sales team. For each member:
  - a. If you wish to select a partner for the sales team, then, from the Display drop-down list, select Partner. The selection is Employee by default.
  - b. Place your cursor in the Name field. It does not matter if this field is blank or displays a name.
  - c. Click **New**.
  - d. Use the Name List of Values (LOV) to select a sales team member.
  - e. If you wish this individual to have view-only access to all opportunities and leads for this customer regardless of whether they are on the sales team for that opportunity or are assigned a lead, then use the Role LOVs to assign the role of Account Manager.

---

---

**Note:** The role you assign here is different from the group and role you select for reporting purposes.

---

---

- f. If you wish to keep the new team member on the team regardless of the assignment made by the territory management module, then select the Freeze check box.

---

---

**Note:** The Team Leader check box is no longer used in this release.

---

---

- g. Click **Save** on the toolbar.

---

---

**Note:** The list is not refreshed automatically, so your entry does not appear in the list until the next time you select this tab or open this window.

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## Using the Relationships Tab

Use the Relationships tab of the eBusiness Center to capture the relationships between individuals and organizations.

You can obtain help on:

- [Capturing a relationship between a person and an organization](#)
- [Capturing a relationship between two organizations](#)
- [Capturing a relationship between two people](#)
- [Ending a relationship between a person and an organization](#)

### Capturing a Relationship Between a Person and an Organization

Use this procedure to capture the relationship between a contact and an organization, for example, when a contact moves from one organization to another. A contact can have relationships with many organizations.

#### Prerequisites

You must [display a consumer](#) or [display a contact at an organization](#) in the eBusiness Center header.

### Steps

1. In the View Details For region, select a radio button labeled with the person's name. This is the first button from the left.

---

---

**Note:** This radio button is disabled if the header displays information on a party type of organization.

---

---

2. Select the Relationships tab.
3. Click in the Subject Name field. It prefills automatically with the name of the person.
4. From the Type drop-down list, select the relationship of the person to the organization.
5. From the Object Type drop-down list, select Organization.
6. Use the Object Name List of Values to enter the organization.
7. Enter a start date if different from the date of entry.
8. If there is a time limit to the relationship, then enter an end date.
9. Click **Save** on the toolbar.

### References

[Understanding Relationships](#)

## Capturing a Relationship Between Two Organizations

Use this procedure to establish and create a relationship between two organizations. For example, to capture the fact that one company has been acquired by another.

### Prerequisites

You must [display one of the organizations](#) or [display a contact at one of the organizations](#) in the eBusiness Center header.

### Steps

1. In the View Details For region, select the radio button labeled with the name of one of the two organizations.
2. Select the Relationships tab.

3. In the Subject Relationship region, click in the Subject Name field. It prefills automatically with the name of the organization.
4. From the Type drop-down list, select the relationship of the organization to the second organization.
5. From the Object Type drop-down list, select Organization.
6. Use the Object Name List of Values to enter the second organization.
7. Enter a start date if different from the date of entry.
8. If there is a time limit to the relationship, then enter an end date.
9. Click **Save** on the toolbar.
10. Optionally in the Object Relationship region, enter a relationship that is symmetrical to the one you entered as a subject region:
  - a. Use the Subject Type LOV to enter Organization.
  - b. Use the Subject Name LOV to enter the organization's name.
  - c. From the Type drop-down list, select the relationship.
  - d. The Object Name is already prefilled with the organization name.
  - e. Enter a start date if different from the date of entry.
  - f. If there is a time limit to the relationship, then enter an end date.
  - g. Click **Save** on the toolbar.

### Guidelines

Depending on your business practice, you may wish to capture both sides of a relationship. For example, if you entered that organization A is the owner of organization B, then you may want to capture the fact that organization B is the subsidiary of A.

### References

[Understanding Relationships](#)

## Capturing a Relationship Between Two People

Use this procedure to capture a relationship between two people, for example, to capture the fact two people are married or that one is the boss of another.

## Prerequisites

You must [display one of the consumers](#) or [display one of the two organizational contacts](#) in the eBusiness Center header.

## Steps

1. In the View Details For region, select the radio button labeled with the name of the person. This is the first radio button from the left.
2. Select the Relationships tab.
3. In the Subject Relationship region, click in the Subject Name field. It prefills automatically with the person's name.
4. From the Type drop-down list, select the relationship that person has to the second person. For example, "Is the manager of", "Is the spouse of" or "is the father of".
5. From the Object Type drop-down list, select Person.
6. Use the Object Name List of Values to enter the second person.
7. Enter a start date if different from the date of entry.
8. If there is a time limit to the relationship, then enter an end date.
9. Click **Save** on the toolbar.
10. Optionally in the Object Relationship region, enter a relationship that is symmetrical to the one you entered as a subject region. For example, if you had entered: "is the manager of" for the subject relationship, then you will want to enter "reports to" for the object relationship.
  - a. Use the Subject Type LOV to enter Person.
  - b. Use the Subject Name LOV to enter the second person's name.
  - c. From the Type drop-down list, select the relationship.
  - d. The Object Name is already prefilled with the name of the person whose record you are changing.
  - e. Enter a start date if different from the date of entry.
  - f. If there is a time limit to the relationship, then enter an end date.
  - g. Click **Save** on the toolbar.

### Guidelines

Depending on your business practice, you may wish to capture both sides of a relationship. For example, if you entered that person A is the manager of person B, then you may want to capture the fact that person B reports to person A.

## Ending a Relationship Between a Person and an Organization

Use this procedure to indicate a person is no longer associated with an organization, when the person moves to a job at another organization, for example.

### Prerequisites

You must [display the contact](#) in the eBusiness Center header.

### Steps

1. In the View Details For region, select a radio button labeled with the name of the organization. This is the second button from the left.

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**Note:** This radio button is disabled if the header displays information on a consumer.

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2. Select the Relationships tab.
3. In the Subject Relationship region, locate the relationship you wish to terminate.
4. If you are not sure the relationship is permanently ended, then select the Inactive check list.
5. If you know the relationship has ended permanently, then enter a date in the End Date field.
6. In the Object Relationship region, repeat the previous two steps for any relationships that are related to the relationships you have ended.
7. Click **Save** on the toolbar.

## Using the Accounts Tab

Use the Accounts tab to view information about a customer's accounts.

You can obtain help on:

- [Viewing accounts a customer has with your organization](#)

## Viewing Accounts a Customer Has with Your Organization

Use this procedure to view information about accounts your customer has with your organization.

This information comes directly from Oracle Receivables. See Oracle Receivables documentation for an understanding of the terms and fields in this tab.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. If you wish to view the accounts of a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you wish to view accounts for an organization, then select the radio button labeled with the name of the organization. This is the second button from the left.
3. Select the Accounts tab.

The tab displays the accounts in a dynamic table.

4. If you wish to view the details of an account, then:
  - a. Select the account in the table.
  - b. Click **Details**.

The Customer Account Details window appears showing the various aspects of the account.

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**Note:** In this release, the information in this window is for viewing only. Do not attempt to create new accounts.

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## Using the Leads Tab

Use the Leads tab in the eBusiness Center to manage your leads.

You can obtain help on the following:

- [Displaying a lead in the Leads tab](#)
- [Creating a lead](#)
- [Displaying the details of a lead in the Lead Center](#)
- [Entering purchase interests and other details for a lead](#)
- [Viewing opportunities created from a lead](#)
- [Qualifying a lead](#)
- [Turning a lead into an opportunity](#)
- [Checking for duplicates when creating an opportunity from a lead](#)
- [Entering notes on a lead](#)
- [Viewing lead notes](#)
- [Accepting a lead assigned to you](#)
- [Refusing a lead assigned to you](#)
- [Assigning a lead to someone else](#)

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**Note:** This tab is disabled if, in the View Details For region, you choose the radio button labeled with the name of the contact and organization (the third button from the left). This is because leads only apply to consumers and organizations.

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### Displaying a Lead in the eBusiness Center

Use this procedure to display a lead for an organization or a consumer.

#### **Prerequisites**

[Display the party in the eBusiness Center header.](#)

### Steps

1. If you wish to view leads for a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you wish to view leads for an organization, then select the radio button labeled with the name of the organization. This is the second button from the left.
3. Select the Leads tab.  
The leads that have been created for this person or organization, if any, are listed in the left side of the tab.
4. If you wish to view only open leads, then deselect the Display All radio button.
5. Select the lead you wish to view or modify from the list. The basic information about the lead appears on the right side of the tab.
6. If you wish to view more details about a lead, then click **Details** to launch the Lead Center.

### Guidelines

If the lead you wish to work on appears in your work queue, then you can double-click on it to display it in the Lead Center where you can modify it. For more information about your Work Queue see [Accessing Leads, Opportunities, and Other Work from Your Work Queue](#).

## Creating a Lead

Use this procedure to create a lead for an organization or a consumer.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. If you are creating a lead for a consumer, then in the View Details For region, select the radio button labeled with the name of the consumer.
2. If you are creating a lead for an organization, then in the View Details For region, select the radio button labeled with the name of the organization.

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**Note:** You cannot create leads for organizational contacts. However, if the eBusiness center header displays a contact, then that contact will automatically be listed as the primary contact for the lead when you create the lead for the organization.

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3. Select the Leads tab.
4. Click **New**.
5. Enter a name of the project. The name you enter in this free-text field is also used as the name for an opportunity you create from this lead.
6. Optionally, enter a description.
7. If you wish to leave the territory management program to automatically assign the lead to a member of the sales team, then leave the Assign to field blank. Make an entry only if you wish to over-ride the territory assignment program and assign this lead to an agent manually.
8. The status of the lead is new by default. You can choose to override the default designation by selecting a status of your own.

The application changes the status to qualified automatically if you enter information in a set of fields determined by your implementation team. These include project name, time frame, and budget. To qualify a lead, the application looks to see only if an entry has been made in specified fields, it does not evaluate the quality of the lead. The automatic lead qualification takes place after you save the lead.

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**Note:** A lead must have the status of qualified for it to be turned into an opportunity.

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9. A close reason is required only if you change the status of a lead to closed or abandoned.
10. Use the Lead Rank field to evaluate the desirability of the lead. If you leave the Lead Rank field blank, then the application ranks the lead based on the information you have entered. The ranking takes place after you save the lead.

The application ranks the lead using a [lead score card set up by your application administrator](#). For example, a time frame of 1-3 months receives

more points than a time frame of 1 year. A budget of \$1 million receives more points than a budget of \$10,000.

11. Specify the sales channel. By default, this can be either direct or indirect.
12. If you entered the campaign for the customer in the Overview tab, then the Campaign Code is prefilled. If you did not make the entry, then enter it now using the List of Values (LOV). If you do not know the campaign name, then save your work and [search for the campaign using other criteria](#).
13. If you entered the offer in the Overview tab, then the Offer Code is prefilled. If you did not make the entry, then enter the offer now using the LOV.
14. Use the Time Frame LOV to enter a time frame in which you expect the lead to close.
15. Enter the budget status.
16. Enter an approximate budget for the lead.
17. If an organization has many locations, then enter a location for the lead.
18. Click **Save** on the toolbar.
19. Click **Details** and [enter product interest and other details](#).

## Using the Lead Center

You can obtain help on the following:

- [Displaying the details of a lead in the Lead Center](#)
- [Entering purchase interests and other details for a lead](#)
- [Viewing opportunities created from a lead](#)
- [Qualifying a lead](#)
- [Turning a lead into an opportunity](#)
- [Checking for duplicates when creating an opportunity from a lead](#)
- [Entering notes on a lead](#)
- [Viewing lead notes](#)
- [Accepting a lead assigned to you](#)
- [Refusing a lead assigned to you](#)
- [Assigning a lead to someone else](#)

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## Displaying the Details of a Lead in the Lead Center

Use this procedure to display the details of a lead in the Lead Center.

### Prerequisites

Navigate to the eBusiness Center.

### Steps

1. [Display the lead in the Leads tab.](#)
2. Click **Details**.

The Lead Center window appears displaying the lead details.

## Entering Purchase Interests and Other Details for a Lead

Use this procedure to enter a prospect's purchase interests and other details into an existing lead.

### Prerequisites

[You must create the lead](#) and [display it in the Leads tab](#) of the eBusiness Center before entering details.

### Steps

1. In the Leads tab of the eBusiness Center, click **Details**.  
The Lead Center window appears.
2. In the Purchase Interest tab, use the Lists of Values (LOVs) to enter the customer's product interest using interest categories set up by the application implementation team.
3. In the Contact tab, enter the contacts for the lead using the First Name LOV. The [contacts must already be entered in the database](#) before you can add them here.

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**Note:** If you are creating the lead for a contact at an organization, then that contact is automatically made the primary contact for the lead.

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4. You can designate one contact as the primary contact by selecting the primary check box.

5. If you wish to assign tasks to others in your organization for this lead, then select the Task tab and follow the instructions for creating tasks.

## Viewing Opportunities Created from a Lead

Use this procedure to view opportunities that have been created from a lead.

### Prerequisites

[Display the lead in the Leads tab](#) of the eBusiness Center before entering details in the Lead Center.

### Steps

1. In the Leads tab of the eBusiness Center, click **Details**.  
The Lead Center window appears.
2. Select the Opportunity tab.  
Any opportunities created from the lead are listed.
3. If you wish to view an opportunity, then select the opportunity from the list and click **Opportunity Center**.  
The Opportunity Center displays the details of the opportunity.

## Qualifying a Lead

Use this procedure to qualify a lead. A lead must be qualified before it can be turned into an opportunity.

### Prerequisites

[Display the lead you wish to qualify in the Leads tab](#).

### Steps

1. If you wish to let the application qualify the lead automatically, then enter information in the required fields.  
The application changes the status of a lead to qualified automatically if you enter information in a set of fields specified by the application administrator. These include project name, time frame, and budget. To qualify a lead, the application looks to see only if an entry has been made in specified fields. It does not evaluate the quality of the lead.

The application checks to see if the lead is qualified each time you save changes to the lead.

2. If you wish to qualify a lead manually, then select **Qualified** from the Status List of Values.
3. Click **Save** on the toolbar.

## Turning a Lead into an Opportunity

Use this procedure to turn a lead into an opportunity.

### Prerequisites

[Display the lead in the lead center.](#)

[The lead must be qualified](#) before you can turn it into an opportunity.

### Steps

1. If the lead does not have a description, enter it now. A description is required for opportunity creation.
2. Click **Create Oppty**.
3. The application checks the lead information you have entered in the lead against information in all existing opportunities to see if a similar opportunity already exists.
4. If a potentially duplicate opportunity exists, then the Lead Linking window appears. [Check for duplicate opportunities to see if you must create a new opportunity or simply link any items to an existing one.](#)

## Checking for Duplicates When Creating Opportunity from a Lead

Use this procedure to check for duplicate opportunities when you are creating an opportunity from a lead and the Lead Linking window appears.

If you find a duplicate, then you can copy any new items the customer is interested in purchasing into an existing opportunity rather than creating a new one. This window appears automatically when the application determines potential duplicates exist. If this window does not appear, you cannot perform a duplicate check.

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**Note:** Agents can create links to opportunities even when they do not have access to those opportunities.

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### Prerequisites

You can only check for duplicate opportunities if the Lead Linking window appears when you are [creating an opportunity from a lead](#).

### Steps

1. The left pane displays the current lead. The right pane displays information on possible duplicate opportunities.
2. In the Opportunity Information, select the first opportunity listed.
3. Click **Detail**.
4. The details of the opportunity you selected displays in the right pane.
5. If the opportunity does not match the lead and more than one potential match was found, then scroll through the possible matches using the Next button. The number of potential matches is displayed in the Matches Found field.
6. If the lead on the left matches an opportunity on the right, then:
  - a. Move any new purchase items from the lead into the opportunity using the right arrow key in the middle of the window.
  - b. Click **Link**.
7. If none of the opportunities found match, then click **Create Oppty** to create a new opportunity.

### Guidelines

Your application administrator sets the criteria that are used to check for potential duplicate opportunities. See [Administering Leads](#).

## Entering Notes for a Lead

Use this procedure to enter a note on a lead.

### Prerequisites

[Display the lead in the Leads tab](#).

## Steps

1. Click **Details**.

The Lead Center appears.

2. Place your cursor in the New Note field at the top right-hand side of the window.
3. Type a note.
4. Click **Save** on the toolbar.

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**Note:** You can edit the note you have entered until you select a different party or start entering a new record.

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5. If you wish to add a second note, then:
  - a. Place your cursor in the New Note text box.
  - b. Click **New** in the toolbar. This is the button with a green plus sign.
  - c. Enter the note and click **Save**.

## References

[About Notes](#)

## Viewing Lead Notes

Use this procedure to view all notes entered for a lead.

## Prerequisites

None

## Steps

1. [Display the lead in the Leads tab](#) or [in the Lead Center](#).
2. Click All Notes.

The Notes window appears. The left pane lists all lead notes.

3. To see the full text of the note, select the note you wish to view on the left. The text is displayed on the right.

4. You can sort notes by clicking on different column headings in the Notes tab list.

### **References**

[Searching for Text Within Notes](#)

[About Notes](#)

## **Accepting a Lead Assigned to You**

Saving a change in a lead assigned to you or creating a new lead automatically makes the lead yours.

## **Refusing a Lead Assigned to You**

Use this procedure to refuse a lead that has been assigned to you in error.

### **Prerequisites**

[Display the lead you wish to refuse in the Leads tab.](#)

### **Steps**

1. Click **Details**.  
The Lead Center window appears.
2. Click **Decline Lead**.  
The Decline Reason window appears.
3. Use the Decline Reason List of Values to select the reason.
4. Click **OK**.

## **Assigning a Lead to Someone Else**

Use this procedure to refuse a lead that has been assigned to you in error.

### **Prerequisites**

[Display the lead you wish to refuse in the Leads tab.](#)

### Steps

1. If you wish to leave the territory management program to automatically assign the lead to a member of the sales team, then delete any name, if any, from the Assign to field.
2. If you wish to over-ride the territory assignment program and assign this lead to an agent manually, then use the Assign to field List of Values to enter an agent's name.
3. Click **Save**.

## Using the Opportunity Tab

Use the Opportunity tab of the eBusiness Center to manage your opportunities.

Help is available on the following:

- [Searching for and displaying an opportunity](#)
- [Displaying the opportunities for a consumer or organization](#)
- [Entering a note for an opportunity](#)
- [Viewing notes for an opportunity](#)
- [Creating an opportunity without a prior lead](#)
- [Entering purchase interest for an opportunity](#)
- [Entering sales credit for purchases in an opportunity](#)
- [Entering opportunity contacts](#)
- [Classifying an opportunity](#)
- [Selecting an opportunity sales team and partners](#)
- [Viewing sales credits for an item in an opportunity](#)
- [Viewing sales credit totals for an opportunity](#)
- [Tracking obstacles to an opportunity](#)
- [Closing an opportunity so you can receive sales credit](#)
- [Assigning tasks for an opportunity](#)
- [Viewing tasks associated with an opportunity](#)
- [Viewing leads associated with an opportunity](#)

- Viewing customer quotes and orders from the opportunity center
- Freezing an opportunity so nobody can modify it
- Creating a quote or order from an opportunity
- Splitting up an opportunity if only some items can close
- Deleting purchase items from an opportunity
- Copying an opportunity

## Searching For and Displaying an Opportunity

Use this procedure to search for an Opportunity using the Universal Search window and display it in the Opportunity tab of the eBusiness Center.

### Prerequisites

None

### Steps

1. In the eBusiness Center, select the Opportunity tab.
2. Click **Search** in the toolbar.  
The Universal Search window opens.
3. Enter search criteria on the Basic tab:
  - The contact name fields search the contacts listed for the opportunity. If you are selling to a contact at an organization, this person is automatically listed as a contact for the opportunity.
  - Enter a range for win probabilities and dates.
  - Selecting the Sales Credit check box limits your search to only those opportunities you are listed to receive sales credit for. Deselecting this check box searches for all opportunities where you are listed in the sales team regardless whether you receive sales credit or not.
4. If you wish to search for events by using other criteria such as the total value of the opportunity or the name of the sales representatives assigned to the opportunity, then enter additional search criteria on the Advanced tab:
  - a. Use the Item List of Values (LOV) to enter the criteria type.
  - b. Use the Condition LOV to enter the operator.

- c. Enter the value.

For example, to search for opportunities worth more than \$100,000, enter `Total Amount for Item, > for the Condition and 100000 for the value.`

5. Click **Search**.

The results of your search appear below.

6. If the opportunity you are looking for is not listed, then try searching with less restrictive search criteria.
7. If the opportunity appears on the list, then:
  - a. Select the result.
  - b. Click **OK** to display the opportunity in the Opportunity tab of the eBusiness Center.

### **Guidelines**

If the opportunity you wish to work on appears in your work queue, then you can double-click on it in the work queue to display it in the Opportunity Center where you can modify it. For more information about your Work Queue see [Accessing Leads, Opportunities, and Other Work from Your Work Queue](#).

## **Displaying Opportunities for a Consumer or an Organization**

Use this procedure to display opportunities for a consumer or an organization.

### **Prerequisites**

[Display the party in the eBusiness Center header](#).

### **Steps**

1. If you wish to view opportunities for a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you wish to view opportunities for an organization, then select the radio button labeled with the name of the organization. This is the second button from the left.
3. Select the Opportunity tab.

The opportunities that have been created for this person or organization, if any, are listed in the left side of the tab.

4. If you wish to view only open opportunities, then deselect the Display All check box.
5. Select the opportunity you wish to view or modify from the list on the left. The basic information about the opportunity appears on the right side of the tab.
6. If you wish to view more details about the opportunity, then click **Details** to launch the Opportunity Center.

## Entering a Note for an Opportunity

Use this procedure to enter a note on an opportunity. You can enter a note on an opportunity either in the Opportunity tab or in the Opportunity Center.

### Prerequisites

Display the opportunity in the Opportunity tab or in the Opportunity Center

### Steps

1. Display the opportunity for which you wish to enter a note either in the Opportunity tab or Opportunity Center.
2. Type your note in the New Note field.
3. Click **Save** on the toolbar.

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---

**Note:** You can edit the note you have entered until you select a different party or start entering a new record.

---

---

4. If you wish to add a second note, then:
  - a. Place your cursor in the New Note text field.
  - b. Click **New** in the toolbar. This is the button with a green plus sign.
  - c. Enter the note and click **Save**.

## Viewing Notes for an Opportunity

Use this procedure to view the notes for an opportunity.

### Prerequisites

None

## Steps

1. [Display the opportunity in the eBusiness Center.](#)
2. Click **All Notes**.

The Notes window appears. The left pane lists all opportunity notes.

3. To see the full text of the note, select the note you wish to view on the left. The text is displayed on the right.
4. You can sort notes by clicking on different column headings in the Notes tab list.

## References

[Searching for Text Within Notes](#)

[About Notes](#)

## Creating an Opportunity Without a Prior Lead

Use this procedure to create an opportunity without a prior lead. If you wish to create an opportunity from an existing lead, then follow the procedure outlined in [Turning a Lead into an Opportunity](#). An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order.

## Prerequisites

[Display the party in the eBusiness Center header.](#)

## Steps

1. If you wish to create an opportunity for a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you wish to create an opportunity for an organization, then select the radio button labeled with the name of the organization. This is the second button from the left.
3. Select the Opportunity tab.

The opportunities that have been created for this person or organization, if any, are listed in the left side of the tab.

4. Click **New**.

5. Enter the basic opportunity information in the fields provided. The fields include the opportunity name, project name, campaign, offer code, status, and budget.

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**Note:** Depending on your implementation, the status of an opportunity determines whether it appears in your forecast or not.

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6. To enter purchase interest and other detailed information, click **Details** and follow the procedure outlined in [Entering Purchase Interest for an Opportunity](#).

## Using the Opportunity Center

Help is available on the following topics:

- [Entering opportunity contacts](#)
- [Classifying an opportunity](#)
- [Selecting an opportunity sales team and partners](#)
- [Viewing sales credits for an item in an opportunity](#)
- [Entering sales credit for purchases in an opportunity](#)
- [Viewing sales credit totals for an opportunity](#)
- [Tracking obstacles to an opportunity](#)
- [Closing an opportunity so you can receive sales credit](#)
- [Assigning tasks for an opportunity](#)
- [Viewing tasks associated with an opportunity](#)
- [Viewing leads associated with an opportunity](#)
- [Viewing customer quotes and orders from the Opportunity Center](#)
- [Creating a quote or order from an opportunity](#)
- [Splitting up an opportunity if only some items can close](#)
- [Deleting purchase items from an opportunity](#)
- [Copying an opportunity](#)

## Entering Items a Customer Wishes to Purchase in an Opportunity

Use this procedure to enter a customer's purchase interests into an opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. In the Opportunity tab of the eBusiness Center, click **Details**.  
The Opportunity Center launches.
2. Select the Purchase Interest tab.
3. Use the Lists of Values (LOVs) to enter the customer's purchase interests.
4. If you wish to create a quote, then you must enter an inventory item using the Inventory Id LOV and a quantity.
5. Click **Save** on the toolbar.

[You are now ready to enter the sales credit for the purchases you have entered.](#)

## Entering Sales Credit for Purchases in an Opportunity

Use this procedure to assign sales agents and partners both revenue and non-revenue sales credits for the individual purchases in an opportunity. You must enter the sales agents and the sales credits they are to receive separately for each item in the opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Purchase Interest tab.
3. Using the select field to the left of a purchase item, select the purchase item for which you wish to assign sales credits.

Any sales agents already receiving credit for this item are listed in the lower portion of the tab.

4. From the Display drop-down list, select the type of sales credit you wish to assign for this item:
  - **Forecast credit:** Revenue credit amounts that show up in the forecasting module of Oracle Sales Online.
  - **Other Credit:** Non-revenue credit. For example, credit toward sales quotas.
5. If you wish to modify the existing credits agents or partners are to receive for the item, then:
  - a. Modify the numbers in the Credit% field for the agent.
  - b. If you are modifying forecast credits, then you must modify the credit percentages for other agents and partners so that the total adds up to 100 percent.
  - c. Click **Save** on the toolbar.

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**Note:** The percent amounts of forecast credits you assign to sales team members and partners must add up to 100 because you are adding up actual revenue. For other non-revenue credits any percentage is allowed.

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6. If you wish to add any additional sales people who are to receive sales credit for this item, then:
  - a. Use the Sales Agent List of Values (LOV) to enter a sales agent. If no blank record lines appear, then use the New button in the toolbar to add an additional record.
  - b. In Credit %, enter the number corresponding to the percentage of commission the individual is to receive.

Any new sales person you add here is automatically added to the sales team for the opportunity.
  - c. If you are assigning revenue credit, then adjust the credit percentages of the other sales agents and partners for this item so the total adds up to 100 percent.
  - d. Click **Save** on the toolbar.
7. If you wish to add any additional partners who are to receive sales commissions for the sale of this item, then:

- a. Use the Partner Name LOV to enter a partner. If no blank record line appears, then use the New button in the toolbar to add an additional records.
- b. In Credit%, enter the number corresponding to the percentage of commission the individual is to receive for this item. Do not enter a percent sign.

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**Note:** The percent amounts of revenue credits you assign to sales team members and partners must add up to 100. For non-revenue credits any percentage is allowed.

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- c. If you are entering revenue credits, then adjust the credits of the other sales agents and partners, so the total adds to 100 percent.
- d. Click **Save** on the toolbar.

## Entering Opportunity Contacts

Use this procedure to enter contacts into an existing opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

The contacts you wish to add must already be in the database as the organizational contacts.

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Contact tab.
3. Using the First Name List of Values, add the contacts.
4. If you wish to designate a contact as the primary contact for the opportunity, then select the Primary check box next to the record. You can only designate one contact as a primary contact for the opportunity.
5. Click **Save** on the toolbar.

## Classifying an Opportunity

Use this procedure to classify an existing opportunity. The CRM territory management program uses this classification to assign a sales team.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Classification tab.
3. Use the Lists of Values to classify the opportunity according to the classification scheme provided by your organization.
4. Click **Save** on the toolbar.

## Selecting an Opportunity Sales Team and Partners

Use this procedure to manually add sales agents and partners to an opportunity sales team. Adding someone to the sales team makes them able to view an opportunity and add notes and tasks. Making the individual team leader enables them to modify all aspects of the opportunity. If your organization has implemented CRM territory management module, then a sales team is assigned to an opportunity automatically.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Sales Team tab.  
The tab lists the current sales team.  
If your organization has set up the CRM territory management module, then the sales team is automatically assigned to the opportunity when you create it.
3. If you wish to add a sales team member, then, in the Internal Sales region:

- a. Use the Sales Agent List of Values to add the agent.
- b. If you wish this individual to have update privileges for this opportunity, then select the Full Access check box. All team members have view privileges.
- c. If you wish to keep this individual regardless of the assignment made by the CRM territory management module, then make sure the Keep check box is selected.
- d. Click **Save** on the toolbar when you have completed adding agents.

## Viewing Sales Credits for an Item in an Opportunity

Use this procedure to view sales credits for individual items in an opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Purchase Interest tab.
3. Using the select field to the left of a purchase item, select the purchase item for which you wish to view sales credits.
4. From the Display drop-down list, select the type of sales credit you wish to view for the item you have selected:
  - **Forecast credit:** Revenue credit amounts that show up in the forecasting module of Oracle Sales Online.
  - **Other Credit:** Non-revenue credit. For example, credit toward sales quotas.

The sales agents and the sales credits they are to receive are listed in the lower portion of the tab.

## Viewing Sales Credit Totals for an Opportunity

Use this procedure to view the total sales credit sales team members are to receive on all the purchase items in an opportunity.

### **Prerequisites**

Display the opportunity in the Opportunity tab of the eBusiness Center.

### **Steps**

1. Click **Details**.

The Opportunity Center launches.

2. Select the Sales Team tab.

3. Click **View Credit Total**.

The Opportunity Credit Total window appears. The window lists both the revenue and non-revenue credit totals for each agent and partner for this opportunity.

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**Note:** The terminology in this window is different from that used in the Purchase Interest tab. The label Quota Sales Credit refers to Forecast Credit (actual revenue). The label Non-Quota Sales Credit refers to Other Credit. (non-revenue)

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## **Tracking Obstacles to an Opportunity**

Use this procedure to track obstacles to a sale such as competitors.

### **Prerequisites**

Display the opportunity in the Opportunity tab of the eBusiness Center.

### **Steps**

1. Click **Details**.

The Opportunity Center launches.

2. Select the Obstacles tab.

3. In the Competitors region, use the Lists of Values (LOVs) to enter any competitors and their products. You can add a free text comments in the Comments field.

4. If you wish to track other issues related to the opportunity, then in the Other Issues region:

- a. Use the Issue LOV to enter an issue.

- b. Select a Status.
  - c. Enter a comment.
5. Click **Save** on the toolbar.

## Closing an Opportunity So You Can Receive Sales Credit

Use this procedure to enter or view closing information for an opportunity. To receive sales credit and to assure accurate pipeline reports, you must close an opportunity and enter a close reason after placing an order for a customer.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Close Reason tab.
3. Use the Close Reason List of Values (LOV) to enter the close reason.
4. If this opportunity has been won, then the resulting orders are listed in the Win region.
5. If you lost the order, then enter the competitor using the LOV provided and any comment.
6. If the opportunity resulted in a sale by a reseller, then add the information in the Reseller Information region.
7. Enter the rest of the closing information for the opportunity. Depending on your implementation you may be required to enter:
  - Win Probability
  - Close Date
  - Sales Stage
8. Change the Status. If you made the sale, then change the status to won.

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**Note:** To change the status of an opportunity to Won, Lost, or No Opportunity, you must enter the close reason first.

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9. Click **Save** on the toolbar.

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**Note:** Changes made in Opportunity Center are not immediately reflected in the Opportunity tab. You must refresh the eBusiness center display first.

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## Assigning Tasks for an Opportunity

Use this procedure to assign a task for an existing opportunity. The task you assign here appears on the work queue of the individual you enter as the owner of the task. This task also remains visible in this task tab. All members of the sales team can view, create, and edit tasks.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Task tab.
3. Click **New**.
4. Use the Lists of Values (LOVs) to enter the task type and priority.
5. Enter a name.
6. Enter a date you wish this task to be performed in the Planned Start field.
7. In Owner, use the LOV to enter the person who is being assigned this task.

---

---

**Note:** This release of Oracle TeleSales does not assign tasks by the Assign To field, but by assigning an owner to the task. The task appears in the work queue of the person designated as the owner.

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---

8. Enter a description.
9. Click **Save** on the toolbar.

## Viewing Tasks Associated with an Opportunity

Use this procedure to view tasks associated with an opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.

The Opportunity Center launches.

2. Select the Task tab.
3. The tasks associated with this opportunity are listed on the left.
4. Selecting the Display All check box, lists both open and closed tasks.
5. Select a task on the list to view its details on the right.
6. If you wish to see further details, then click **Details**.

The details of the task are displayed in the Task window. See Oracle CRM foundation documentation for information on how to use the task manager.

## Viewing Leads Associated with an Opportunity

Use this procedure to view any leads that were used to create an opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.

The Opportunity Center launches.

2. Select the Leads tab.
3. The leads that were used to create this opportunity are listed.
4. If you wish to view any of the leads, then:
  - a. Select the lead.
  - b. Click **Lead Center**.

- c. If you wish to view details of multiple leads, then select the Display Multiple Lead Centers check box.

## Viewing a Customer's Quotes and Orders for a Specific Opportunity

Use this procedure to view a customers past orders and quotes.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Quotes/Orders tab.
3. If you wish to previous orders from the customer, then:
  - a. From the View drop-down list, select Orders.  
The customer's orders in accounts receivables are listed in the tab.
  - b. Select an order you wish to view.
  - c. Click **Details** to view details of the order in a separate window in Oracle Order Management.
4. If you wish to view quotes for this customer, then:
  - a. From the View drop-down list, select Quotes.  
The customer's quotes are listed in the tab.
  - b. Select a quote you wish to view or modify.
  - c. Click **Details** to view details of the quote in an Oracle Order Capture window.

## Freezing an Opportunity So Nobody Can Modify It

Use this procedure to freeze an opportunity so it cannot be modified. After an opportunity is frozen, nobody, including the person who froze the opportunity, can make any modification unless they obtain permission from the application administrator.

### Prerequisites

You must be on the sales team for the opportunity to freeze it.

### Steps

1. [Display the opportunity in the Opportunity tab of the eBusiness Center.](#)
2. Select the Freeze check box.
3. Click **Save** in the toolbar.

### Guidelines

An opportunity with the Freeze check box selected can only be updated by people with special responsibility which is set up by your application administrator using the Update Frozen Opportunities system profile option.

## Creating a Quote or Order from an Opportunity

Use this procedure to create a quote from an opportunity. You must enter an inventory item as a purchase interest before you can create a quote or order

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

Before you can create an order, you must [enter the ship to and bill to address.](#)

### Steps

1. Click **Details**.

The Opportunity Center launches.

2. Select the Purchase Interest tab.
3. [Enter inventory items and quantities for the purchase interest.](#)
4. Click **Create Quote** in the Opportunity Center header.

The Order Capture window opens. Follow the instructions outlined in the Oracle Order Capture documentation for preparing quotes and booking orders.

5. [You must close the opportunity so you and others on the opportunity sales team can receive sales credit.](#)

## Splitting Up an Opportunity If Only Some Items Can Close

Use this procedure to split up an opportunity so that you can close on some purchase items while others remain open. You first make a copy of the opportunity and then specify the items you wish to split by making deletions from the copy and the original.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

### Steps

1. Click **Details**.

The Opportunity Center launches.

2. Click **Copy**.

The Opportunity Center displays the copy you have made. The only information changed is the opportunity number which is automatically incremented by one.

3. Rename the copy you have made.
4. [Delete the purchase items](#) which are to close from the copy.
5. Click **Save** in the toolbar.
6. Navigate to the eBusiness Center.
7. From the list on the Opportunity tab, select the opportunity you have copied.
8. Click **Details**.

The Opportunity Center displays.

9. [Delete the purchase items](#) which are in the copy you have made.
10. Click **Save** in the toolbar.

## Deleting Purchase Items from an Opportunity

Use this procedure to delete purchase items from an opportunity.

### Prerequisites

[Display the opportunity in the Opportunity tab of the eBusiness Center.](#)

You must be designated as a team leader on the opportunity sales team.

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Select the Purchase Interest tab.
3. Select the purchase item you wish to delete.
4. Click **Clear Record** on the toolbar.

## Copying an Opportunity

Use this procedure to copy an opportunity. You will want to copy an opportunity if you wish to split an opportunity

### Prerequisites

[Search for and display the opportunity.](#)

### Steps

1. Click **Details**.  
The Opportunity Center launches.
2. Click **Copy**.  
The Opportunity Center displays the copy you have made. The only information changed is the opportunity number which is automatically incremented by one.

## Updating Opportunities

You can update opportunities in one of three ways:

- [Update opportunities one at a time using the Opportunity Center](#)
- [update the win probabilities, sales stages, close dates, and channel fields for a list of opportunities using the mass opportunity window.](#) You create a list using the Lookup Center and update all opportunities on that list to the values you enter in the Mass Opportunity Update window.
- [Update multiple opportunities in one window.](#) This method allows you query up the opportunities you wish to modify and modify each opportunity individually in one window.

## Updating an Individual Opportunity

Use this procedure to update an individual opportunity in the Opportunity tab of the eBusiness center.

### Prerequisites

The opportunity must be created first.

### Steps

1. [Display the opportunity in the Opportunity tab of the eBusiness Center.](#)
2. Click **Details**.
3. The Opportunity Center window appears.
4. Update the opportunity. You can:
  - [Enter opportunity contacts](#)
  - [Enter items a customer wishes to purchase](#)
  - [Enter sales credit for purchases in an opportunity](#)
  - [Create a quote or order from the opportunity](#)
  - [Close the opportunity so you can receive sales credit](#)
  - [Classify the opportunity](#)
  - [Select the sales team and partners](#)
  - [Track obstacles to the opportunity](#)
  - [Assign tasks to others regarding this opportunity](#)
  - [View customer quotes and orders](#)
  - [Split up the opportunity if only some items can close](#)
  - [Delete purchase items from an opportunity](#)

## Updating a List of Opportunities

Use this procedure to update the win probabilities, sales stages, close dates, and channel fields for a list of opportunities. If you wish to open multiple opportunities in one window so you can update their values one at a time, then you must instead use the Pipeline Management window. See [Updating Multiple Opportunities in One Window](#).

### Prerequisites

You must first create a list of opportunities you wish to update.

### Steps

1. Navigate to Mass Opportunity Update.  
The Mass Update of Opportunities window opens.
2. Click **Search**.  
The opportunities on the list display below.
3. Use the Lookup Name List of Values (LOV) to find the list of opportunities you wish to update.
4. Select the opportunities you wish to update, by selecting the Select check box for each.
5. Make entries in the win %, sales stages, close dates, and channel fields for each entry.
6. Click **Mass Update**.

## Updating Multiple Opportunities in One Window

Use this procedure to update multiple opportunities at the same time using the pipeline management window.

### Prerequisites

None

### Steps

1. From the Navigator, select Pipeline Management.  
The Pipeline Search Criteria window appears.
2. Enter your search criteria.
  - You can use the % sign to substitute for any missing characters.
  - You can enter one value or a range of values for win probability, close date, total amount, and sales credit amount.
  - Select one of the Credits radio buttons to search for opportunities with forecast credits, other (non-revenue) credits, or both, for the agent listed in the Sales Agent field.

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**Note:** The application uses the logical AND to connect your search criteria. Each field you enter restricts your search further.

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3. If you belong to or manage multiple sales groups, then you can restrict the search to a particular sales group by selecting that sales group from the Sales Group List of Values (LOV).
4. If you manage a sales group, you can restrict the search to a single member of the sales group. To do so, use the Sales Agent field LOV to enter the name of the subordinate.

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**Note:** If you do not manage a sales group, you can only search for your own opportunities. In this case, your name prefills the Sales Agent field automatically.

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5. Click **Search**.

The Pipeline Search Results window appears displaying the results of your search.

6. If you need to modify the search, then click **Return to Search** to return to the Pipeline Search Criteria window.
7. If you wish to update the win probability (Win %), status, close date, channel, sales stage, or close reason for an opportunity, then make your entry in the list of opportunities.

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**Note:** You must use the scroll bar to reveal the Sales Stage and Close Reason fields.

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8. If you wish to view the total revenue amount of the opportunities listed, then click **Calculate**.
9. If you wish to change the purchase interest for an opportunity, then:
  - a. Select the opportunity you wish to modify from the list at the top of the window. You can click in any field to select an opportunity.  
The purchase interest information for that opportunity appears below.
  - b. Make your modifications.

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**Note:** You must use the scroll bar to reveal the quantity, purchase amount and other fields.

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10. If you wish to modify the sales credit for individual items in an opportunity, then:
  - a. Select the opportunity you wish to modify from the list at the top of the window.

The purchase interest information for that opportunity appears below.
  - b. Select the item.
  - c. From the Display drop-down list, select Forecast Credit or Other Credit.
  - d. Modify the credit amounts for the item.
11. Click **Submit Changes** to save your work.
12. If you wish to close the window, then from the File menu, choose Close Form.

## Using the Quote and Order Tab

Use the Quote/Order tab of the eBusiness Center to view a list of quotes and orders and to launch Oracle Order Capture, the application where you create customer quotes and place orders.

You can obtain help on:

- [Viewing and modifying quotes](#)
- [Viewing and modifying orders](#)
- [Creating a quote or an order without a lead or an opportunity](#)

## Viewing and Modifying Quotes

Use this procedure to view or modify a quote for a customer.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. If you wish to view the quotes for a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you wish to view the quotes for an organization, then, in the View Details For region, select the radio button labeled with the organization's name. This is the second button from the left.

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**Note:** You cannot view quotes for a contact at an organization. View the quotes for an organization instead.

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3. Select the Quote/Order tab.
4. From the View drop-down list, select Quotes.  
The tab displays the list of quotes.
5. Select a quote from the list.
6. Click **Details**.

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Oracle Order Capture appears displaying the quote. Follow the procedures outlined in the Oracle Order Capture documentation to modify quotes.

## Viewing and Modifying Orders

Use this procedure to view or modify an order for a customer.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. If you wish to view the orders for a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you wish to view the orders for an organization, then, in the View Details For region, select the radio button labeled with the organization's name. This is the second button from the left.

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---

**Note:** You cannot view orders for a contact at an organization. View the orders for an organization instead.

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3. Select the Quote/Order tab.
4. From the View drop-down list, select Orders.  
The tab displays the list of orders.
5. Select an order from the list.
6. Click **Details**.

The Order Organizer window from Oracle Order Management appears displaying the order. Follow the procedures outlined in the Oracle Order Management documentation to view and modify orders.

## Creating a Quote or an Order Without a Lead or Opportunity

Use this procedure to create a quote or an order for a consumer or an organization directly without using an opportunity to track the sales process.

## Prerequisites

Display the party in the eBusiness Center header.

## Steps

1. If you creating a quote or an order for a consumer, then, in the View Details For region, select the radio button labeled with the person's name. This is the first button from the left.
2. If you creating a quote or an order for an organization, then, in the View Details For region, select the radio button labeled with the organization's name. This is the second button from the left.

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---

**Note:** You cannot create a quote or an order for a contact at an organization. Create it for the organization instead.

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3. If you are creating an order, then you must [enter the billing and shipping addresses](#).
4. Select the Quote/Order tab.
5. Click **New**.

The Order Capture window opens. Follow the instructions outlined in the Oracle Order Capture documentation for preparing quotes and booking orders.

## Using the Event Tab

Use the Event tab of the eBusiness Center to enroll customers or prospects in events and send out confirmations.

[Click here for a detailed overview of this tab.](#)

Help is available on the following tasks:

- [Searching for an event using multiple search criteria](#)
- [Displaying an event](#)
- [Viewing enrollment and other event information](#)
- [Choosing events and adding enrollees](#)
- [Completing enrollment and sending out confirmations](#)
- [Creating contacts or consumers for enrollment and collateral shipment](#)
- [Viewing enrollment history](#)

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**Note:** This version of the application does not support payments for events.

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### Searching for an Event Using Multiple Search Criteria

Use this procedure to search for events in the Event tab using multiple search criteria.

#### Prerequisites

None

#### Steps

1. In the eBusiness Center Event tab, click **Search Event**.  
The Universal Search window opens.
2. Enter search criteria on the Basic tab.

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**Note:** The event date fields refer to the dates the event starts and finishes, not a date range.

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3. If you wish to search for events by language, cost, city, state, province, and country or if you wish to search for events depending on whether they are by invitation only or open to all, then enter additional search criteria on the Advanced tab:
  - a. Use the Item List of Values (LOV) to enter the criteria type.
  - b. Use the Condition LOV to enter the operator.
  - c. Enter the value.

For example, to search for an event costing less than \$100, enter `Cost` for Item, `<` for the Condition and `100` for the value.
4. Click **Search**.

The results of your search appear below.
5. If the event you are looking for is not listed, then try searching with less restrictive search criteria.
6. If the event appears on the list, then:
  - a. Select the result.
  - b. Click **OK** to display the event in the Event tab of the eBusiness Center.

## Displaying an Event

Use this procedure to display an event in eBusiness Center Event tab.

### Prerequisites

None

### Steps

1. Navigate to the Event tab.
2. If the Event tab already displays another event, then:
  - a. Place your cursor in the Campaign or Event Name fields.
  - b. Click **New** in the toolbar.
3. If your organization has many events, then use the Campaign List of Values (LOV) to enter a campaign. Entering a campaign restricts the number of events displayed in the Event Name LOV.
4. If you know the name of the event, then use the Event Name LOV to enter it.

5. If you do not know the event name, or wish to search by some other criteria such as the date the event is being offered, then click **Search Event** to search for it.
6. If you wish to view enrollment, availability, and other information about the event, then click **Item Details** in the Item View region and follow the procedure described in [Viewing Enrollment and Other Event Information](#).

## References

[Click here for a detailed overview of the Event tab.](#)

## Viewing Enrollment and Other Event Information

Use this procedure to view enrollment and detailed information about an event. This can include detailed descriptions of the event agenda, the venue, driving directions, and collateral associated with the event. What information you can view depends on the information entered in Oracle Marketing Online.

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**Important Note:** In this release, the information in this window is for viewing only. You cannot use this window to select or send any collateral or cover letters as these features are disabled.

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## Prerequisites

[Display the event in the Event tab of the eBusiness Center.](#)

## Steps

1. With the event displayed in the Event tab, click **Item Details**.

The Enrollment Details window appears displaying the number of available spots, enrollment totals, as well as a listing the enrollees in the event.

The Main Contact listed is the person who spoke with the agent to make the enrollment. The main contact may or may not be an enrollee.
2. If you wish to view details about the event, then:
  - a. From the View By drop-down list, select Information.

The window displays available information and collateral.
  - b. In the Available Event Information region, select an item you wish to view in full in the description field to the right.

## References

[Click here for a detailed overview of the Event tab.](#)

## Recording Attendance at an Event

Use this procedure to add information about whether an enrollee attended the event and where they enrolled.

### Prerequisites

[Display the event in the Event tab of the eBusiness Center.](#)

### Steps

1. With the event displayed in the Event tab, click **Item Details**.  
The Enrollment Details window appears listing the enrollees in the event.
2. Make sure Roster is selected in the View By drop-down list.
3. For each event enrollee whose attendance you wish to record:
  - a. Select the enrollee(s) in the list. You can select multiple enrollees using the shift or CTRL keys on your keyboard.
  - b. In the Roster region at the bottom of the window, use the Attended List of Values (LOV) select Y (Yes) or N (No).
  - c. Using Source LOV, select who enrolled the individual.
  - d. Click **Update**.

## Choosing Events and Adding Enrollees

Use this procedure to start the enrollment process for small numbers of people in an event. This procedure tells you how to choose events and add enrollees.

If you are enrolling a large number of people, then follow the procedure for [enrolling lists of contacts](#) instead.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

## Steps

1. If you are enrolling consumers, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you are enrolling contacts at an organization, then, In the View Details For region, select the radio button labeled with the name of the person and the organization. This is the third button from the left. If this button is disabled, you can also enroll contacts with the organization button selected.
3. Select the Event tab.
4. If you know the campaign associated with the event, then use the List of Values (LOV) to enter a campaign. This field restricts which events are displayed in the Event Name LOV.

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**Note:** You are not restricted to enrolling a contact in the events tied to a particular campaign. You can enroll contacts in events from multiple campaigns. You must have at least one campaign associated with the order, however.

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5. If you know the name of the event, then use the Event Name LOV to enter it.
6. If you do not know the event name, or wish to search by some other criteria such as the date the event is being offered, then click **Search Event to search for it**.

Information about the event displays in the Event Description and Item View regions of the Event tab.

The Spots field in the Item View region displays the number of available spots.

7. If you wish to view enrollment, availability and other information about the event, then click **Item Details**. For more information see [Viewing Enrollment and Other Event Information](#).
8. If the customer does not wish to enroll in this event but would like to view another, then:
  - a. Check if the Item # field shows there is more than one event available for view.
  - b. If additional items are available, then you can navigate to the other events using the arrow keys.

- c. If no additional events are ready for view, then place your cursor in either the Campaign or Event Name fields, click **New** in the toolbar and enter another event.
9. If the contact wishes to enroll people in this event then:
  - a. Click **Add to Cart**.
  - b. Use the Enrollees field LOV to add contacts. If you require additional entry fields, click **New** on the toolbar or press down arrow on the keyboard to create them.
  - c. If you do not know the name of the people who will be attending, then add the person making the arrangements as a place holder for each of the enrollees.

You can use the name of one contact to reserve multiple spots.
  - d. If the individuals you wish to enroll do not appear on the Enrollees LOV, then either [add the new enrollee as a contact](#) or use another name as a place holder.

The enrollees you enter are saved temporarily while you work with this customer, so you need not save each one individually.
  - e. When you are done adding enrollees for this event, you can display another event and add enrollees to it.
10. When you have completed adding all events and enrollees, click **Enroll** to [complete the enrollment and send out confirmation emails](#).

## References

[Click here for a detailed overview of the Event tab.](#)

## Completing Your Enrollment Order and Sending Out a Confirmation

Use this procedure to complete the enrollment for the events in your cart and to send out a confirmation email to the main contact.

### Prerequisites

You must first choose the event and add enrollees in the Event tab first or use the mass enrollment procedure before you can complete the process.

## Steps

1. In the Event tab, click **Enroll**.

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**Note:** If the Enroll button is disabled, this means that you have not added any events to the cart.

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The Event Registration Review window appears listing the events and enrollees for your order.

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**Note:** The payment information in this window is not functional in this release.

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2. Use the Confirmation Letter List of Values (LOV) to select the email the main contact is to receive. The main contact is the party who requested the order.
3. The Shipping Method is E-Mail. This is the only type of confirmation available in this release.
4. Use the Mail to LOV to enter an email address.
5. Click **Enroll**.

The application adds the confirmation number and enrollment status to the enrollee information in the list above.

6. When you have completed the enrollment process for each enrollee, then click **Close**.

## Guidelines

The application administrator can specify the email address enrollees can reply to 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

## References

[Click here for a detailed overview of the Event tab.](#)

## Creating Contacts or Consumers for Enrollment and Collateral

Use this procedure to create new organizational contacts or consumers so you can email them collateral or add them as enrollees in an event. This procedure provides an alternate way of creating parties in your database.

### Prerequisites

You can only access this method from the

### Steps

1. If you are in the Event tab, then click **New Contact**.
2. If you are in the Collateral tab, then click **New Party**.  
The Creation of Party window appears.
3. From the Party Type drop-down list, select the party type you are creating:
  - **Person**: to create a consumer.
  - **Party Relationship**: to create a contact at an organization.
4. If you are creating a contact at an organization, then the Organization field prefills automatically with the name of the organization.
5. Enter the individual's name.
6. If you are creating a contact at an organization, then use the Relation List of Values (LOV) to enter a relationship. Usually this is "Contact".
7. Enter the person's email address. You need this to send the confirmation email and electronic collateral.
8. Enter other contact information.
9. Click **OK**.

## Viewing Enrollment History

Use this procedure to view the enrollment history for a consumer, a contact at an organization, or for all the organization as a whole.

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**Note:** You cannot view information relating to payments for events in this release.

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## Prerequisites

[Display the party in the eBusiness Center header.](#)

## Steps

1. If you wish to view the enrollment history of a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to view the enrollment history of the whole organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to view the enrollment history of a specific contact at an organization, then, In the View Details For region, select the radio button labeled with the name of the person and the organization. This is the third button from the left.
4. Select the Event tab.
5. Click **Event History**.

The Customer Event History window appears showing the enrollment history for the individual or organization you selected in View Details For.

The Main Contact field lists the individual who made the enrollment. The Enrollee Name displays the actual person enrolled.

6. If you are viewing enrollment for an organization and wish to view only the enrollment for a specific contact at the organization, then:
  - a. Use the Contact Name field List of Values (LOV) to select the name of the contact.
  - b. Click **Find**.

The window displays the enrollment history for that contact only.
7. If you wish to view the details of any of the enrollments such as enrollment status, then select the event in the list. The details appear in the fields below.
8. Click **Cancel** when you are done reviewing event history.

## References

[Click here for a detailed overview of the Event tab.](#)

## Using the Collateral Tab

Use the Collateral tab of the eBusiness Center to send electronic collateral to customers and prospects.

Help is available on the following:

- [Creating contacts or consumers for enrollment and collateral shipment](#)
- [Searching for collateral using multiple search criteria](#)
- [Preparing an order to email collateral to a contact or a consumer](#)
- [Completing the order to email collateral](#)
- [Viewing collateral history](#)

## Searching for Collateral Using Multiple Search Criteria

Use this procedure to search for collateral in the Collateral tab using multiple search criteria.

### Prerequisites

None

### Steps

1. In the eBusiness Center Collateral tab, click **Search**.

The Universal Search window opens.

2. Enter search criteria on the Basic tab.

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**Note:** The collateral Release Date fields allow you to search for collateral released between the start and end dates you enter.

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3. If you wish to search for collateral by other criteria such as language, or available quantity, then enter additional search criteria on the Advanced tab:
  - a. Use the Item List of Values (LOV) to enter the criteria type.
  - b. Use the Condition LOV to enter the operator.
  - c. Enter the value.

For example, to search for collateral where the available quantity is more than 100 pieces, enter Qty Avail for Item, > for the Condition and 100 for the value.

4. Click **Search**.

The results of your search appear below.

5. If the collateral you are looking for is not listed, then try searching with less restrictive search criteria.
6. If the collateral appears on the list, then:
- Select the result.
  - Click **OK** to display the collateral in the Collateral tab of the eBusiness Center.

## Preparing an Order to Email Collateral to a Contact or a Consumer

Use this procedure to create an order to email electronic collateral to a consumer or a contact at an organization.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

- If you wish to send collateral to a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
- If you wish to send collateral to someone at an organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
- For each piece of collateral you wish to add to the order:
  - If you know the campaign the collateral is associated with, then enter it in the Campaign field. This name is prefilled if you had entered a campaign in the Overview tab. An entry in this field restricts the number of collateral available in the Collateral Name LOV.
  - If you know the name of the collateral you wish to send, then use the Name LOV in the Collateral Description region to enter it.

- c. If you do not know the collateral name, or wish to search by some other criteria such as the available quantity or release date, then click **Search to search for it**.

The Collateral Description region displays basic information about the collateral.

- d. In the Contact field, use the LOV to enter the name of the individual you wish to email the collateral to. This field may already be prefilled.
- e. Select EMAIL as the shipping method.
- f. Use the Mail To LOV to select the email address.

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**Note:** In this release, the Mail List of Values uses the email addresses from the party type of person (the consumer) and not the party relationship (organizational contact). You must enter the contact's email address as an email address in the party type of person for it to appear here.

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- g. Use the Cover Letter Email LOV to enter the email for the contact that will be used to send a confirmation email. This may be the same as the Mail To email.
  - h. Click **Add to Cart**.
4. When you are done, click **View Cart to complete the procedure for creating an order to email collateral**. You must complete this last step for the collateral to be emailed out.

## Completing the Order to Email Collateral

Use this procedure to request email delivery of collateral added to the cart on the Collateral tab of the eBusiness Center. This procedure requests the collateral to be emailed. It is up to the 1-1 Fulfillment module of the CRM eBusiness Suite to ensure they are.

### Prerequisites

[Prepare the collateral for mailing in the Collateral tab.](#)

### Steps

1. On the Collateral tab of the eBusiness Center, click **View Cart**.

The Collateral Request Confirmation window appears.

2. Select the collateral you wish to send.
3. Click **Send Request**.

## Viewing Collateral History

Use this procedure to view the status of requests you have submitted for the emailing of collateral.

### Prerequisites

[Display the party in the eBusiness Center header.](#)

### Steps

1. If you wish to view a record of the collateral you requested to be sent to a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to view a record of the collateral you requested to be sent to an organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to view a record of collateral you requested to be sent to a contact at an organization, then, In the View Details For region, select the radio button labeled with the names of the contact and the organization. This is the third button from the left.
4. On the Collateral tab, click **History**.  
The Request History window appears listing the requests.
5. To view more details about an individual request:
  - a. Open up the request by clicking on the node labeled with a +.
  - b. Click on the line immediately below to display the details of the collateral that was requested.
6. Click **OK** to close the window.

## Using the Task Tab

Use the Task tab in the eBusiness Center to view and create general tasks for a consumer, an organization, or an organizational contact. The task you create here appears in the Work Queue of the individual you assign as the owner of the task.

If you wish to view or create tasks specific to an opportunity or a lead, then use the Lead or Opportunity tabs instead.

Help is available on the following:

- [Viewing tasks assigned for a consumer, an organization, or a contact](#)
- [Creating a task for a consumer, an organization, or a contact](#)

## Viewing Tasks Assigned for a Consumer, an Organization, or a Contact

Use this procedure to view all of the tasks assigned to agents regarding a consumer, an organization, or an organizational contact. If you wish to view tasks assigned to you, then use the work queue instead.

### Prerequisites

[Display the party you wish to create a task for in the eBusiness Center header.](#)

### Steps

1. If you wish to view the tasks relating to a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to view the tasks relating to an organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to view the tasks relating to a contact at an organization, then, In the View Details For region, select the radio button labeled with the names of the contact and the organization. This is the third button from the left.
4. Select the Task tab.
5. The tasks associated with this party are listed on the left.
6. Selecting the Display All check box, lists both open and closed tasks.
7. Select a task on the list to view its details on the right.
8. If you wish to see further details, then click **Details**.

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The details of the task are displayed in the Task window. See Oracle CRM foundation documentation for information on how to use the task manager.

## Creating a Task for a Consumer, an Organization, or a Contact

Use this procedure to create a task for a consumer, an organization, or an organizational contact. The task you create will appear in the Work Queue of the individual you assign as the owner of the task.

If you wish to assign a task for an opportunity or a lead, then create the task in the Lead or Opportunity tabs instead. Where you create a task determines how a task is categorized in the work queue.

### Prerequisites

[Display the party you wish to create a task for in the eBusiness Center header.](#)

### Steps

1. If you wish to create a task for a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to create a task for an organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to create a task for a contact at an organization, then, In the View Details For region, select the radio button labeled with the names of the contact and the organization. This is the third button from the left.
4. In the Task tab, click New.
5. Use the Lists of Values (LOVs) to enter the task type and priority.
6. Enter a name for the task.
7. Enter a date you wish this task to be performed in the Planned Start field.
8. In Owner, use the LOV to enter the person who is being assigned this task.

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**Note:** This release of Oracle TeleSales does not assign tasks by the Assign To field, but by assigning an owner to the task. The task appears in the work queue of the person designated as the owner.

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9. Enter a description.
10. Click **Save** on the toolbar.

# Using the Lookup Center

Use this window and those you launch from it to create and manage lists. You can use the Lookup Center to create lists of hot leads and opportunities, for example, or a list of customers for mailing collateral.

Help is available on the following topics:

- [Creating a list](#)
- [Displaying a list](#)
- [Modifying list availability and description](#)
- [Exporting a list to a text file](#)
- [Saving search criteria for frequently generated lists](#)

## Creating a List

Use this procedure to create a list. You can create a list of consumers, contacts at an organization, organizations, leads, opportunities, quotes, campaigns, events, and collateral.

You can send collateral to a list of customers and you can update all opportunities on a list at the same time using the Mass Opportunity window. You can also export a list for use on your desktop computer.

### Prerequisites

None

### Steps

1. Navigate to the Lookup Center.
2. Click **New Lookup**.  
The Universal Search window appears.
3. If you wish to use search criteria you have saved previously in a folder, then:
  - a. Click **Open Folder**.  
The Open Folder window appears.

- b. Select the search criteria you wish to use form the list.
  - c. Click **OK**.
4. If you wish to enter new search criteria, then follow the procedure outlined in [Entering Search Criteria for Lookups](#).
5. Click **Search**.

The results of your search appear in the list below.

6. To save the list:
  - a. Click **Save Lookup**.

The Save Lookup window appears.
  - b. Enter a name for the list.
  - c. If you wish to assign the list to a sales group, then use the Assign to Group List of Values (LOV) to enter the group. Otherwise leave this field blank.
  - d. If you wish to keep the list private, so that it is visible only to you, then select the Private radio button.
  - e. If you wish to make this list accessible to others in your organization, then select the Internal radio button.
  - f. If you wish this list to be available to your organization and to partners, then select the Partner radio button.
  - g. Click **OK** to display the result in the eBusiness Center.

### References

See [About Creating Lists](#) for an overview of lists in Oracle TeleSales.

## Entering Search Criteria for Lookups

Use this procedure to enter search criteria into the Universal Search window for creating lists (lookups).

### Prerequisites

Use this procedure only while [creating lists](#) (lookups).

### Steps

1. From the Find drop-down list, select the type of list you wish to generate.

2. Enter search criteria on the Basic tab.

The window displays different fields depending on the on list you are generating.

The search combines the different search criteria you enter using the logical AND. This means that entering two search criteria returns only results matching both search criteria. For example, searching on a partial name and a partial phone number returns only individuals whose names and phone numbers match both.

You can search on partial numbers or words provided you use the wild card % to indicate missing or unknown characters. For example, a search for j%n in the First name field retrieves all first names starting with the letter j and ending with the letter n, including John, Jon, and Johann.

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**Note:** Using the Basic tab of the Universal Search window, you can only search on the primary address, email, and URL. If you wish to search on all addresses, email addresses, and URLs, then you must enter the search criteria on the Advanced tab.

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3. If you wish to search by criteria not available on the Basic tab, then enter additional search criteria on the Advanced tab:

- a. Use the Item List of Values (LOV) to enter the criteria type.
- b. Use the Condition LOV to enter the operator.
- c. Enter the value.

For example, to search for an event costing less than \$100, enter `Cost for Item, <` for the Condition and `100` for the value.

## Displaying a List

Use this procedure to display a list you have generated using the Lookup Center window.

### Prerequisites

The list must be [created](#) first.

### Steps

1. Navigate to the Lookup Center.
2. From the Find drop-down list, select the type of list you wish to view.

The Lookup Center displays a list of the lists you and others in your organization have generated.

3. Select a list.
4. Click **View Lookup**.

The Lookup Results window displays the list. The owner of the list is the list creator.

## Modifying List Availability and Description

Use this procedure to modify a list you have generated in the Lookup Center. You can only modify the description and list availability to others in your organization. You cannot rename, delete, or modify entries in the list. If you wish to modify the list entries, you must instead create a new list.

### Prerequisites

The list must be [created](#) first.

### Steps

1. Navigate to the Lookup Center.
2. From the Find drop-down list, select the type of list you wish to modify.

The Lookup Center displays a list of the lists you and others in your organization have generated.

3. Select a list.
4. Click **View Lookup**.

The Lookup Results window displays the list. The owner of the list is the list creator.

5. If desired, modify the description of the list.
6. If desired, change the availability of the list to others in and outside of your organization. Select one of the following radio buttons:
  - **Private:** To keep the list private, so that it is visible only to you.

- **Internal:** If you wish to make this list accessible to others in your organization.
  - **Partner:** If you wish this list to be available to others in your organization and to partners.
7. Click **Save Lookup** to save your changes.

## Exporting a List to a Text file

Use this procedure to export a list you have generated using the Lookup Center window into a text file. The text file you generate is located in the server directory set up by your application administrator.

### Prerequisites

The list must be [created](#) first.

### Steps

1. Navigate to the Lookup Center.
2. From the Find drop-down list, select the type of list you wish to export.  
The Lookup Center displays a list of the lists you and others in your organization have generated.
3. Select a list.
4. Click **View Lookup**.  
The Lookup Results window displays the list. The owner of the list is the list creator.
5. Click **Export Lookup**.  
The list is exported to a text file in the location shown in the message bar at the bottom of the window.

## Saving Search Criteria for Frequently Generated Lists

Use this procedure to save the search criteria for generating lists. The saved criteria, called a folder, allow you to regenerate a list frequently. You will want to do this, for example, if you wish to keep an up-to-date list of your hot leads or the opportunities that are to close this week.

### **Prerequisites**

None

### **Steps**

1. Navigate to the Lookup Center.
2. Click **New Lookup**.  
The Universal Search window appears.
3. [Enter the search criteria](#).
4. Click **Search**.
5. Check the results of your search to make sure the criteria give you the desired result.
6. If the results are satisfactory, then click **Save Folder**.  
The Save Folder window appears listing your previously saved folders.
7. Enter the name of the folder.
8. Click **Save**.

# Administering Oracle TeleSales

This group of topics explains how to administer different functions of Oracle TeleSales. Depending on your implementation, these procedures may be restricted to applications administrators only.

## Administering Leads

Use this procedure to administer leads.

### 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.**

## Setting Up the Lead Score Card

Use this procedure to modify an existing lead score card or create a new one. A score card assigns points to each piece of information entered in a lead and uses the sum to assign a rank to that lead. 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.

### Steps

1. Under the TeleSales Administrator responsibility, navigate to Lead Scorecard.
2. If you wish to modify an existing lead score card, then use the Description List of Values LOV to select a score card.
3. If you wish to create a new score card, then:
  - a. Enter a new Description.
  - b. Click **Save** in the toolbar.
4. 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**.
5. If you wish to edit a rule, then select the rule and click **Edit**.

## Assigning Campaigns to Agents

Use this procedure to assign campaigns to agents.

### Prerequisites

You must be logged in under the TeleSales Administrator responsibility.

### 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**.

## Creating 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](#).

### Prerequisites

You must be logged in under the TeleSales Administrator responsibility.

### 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.



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

## Assigning 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.



# Implementing Oracle TeleSales

This group of topics relates to the implementation of Oracle TeleSales. For a complete list of implementation steps, see the *Oracle TeleSales Implementation Guide*.

## Enabling 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](http://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.

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

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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.

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

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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&rtid=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**.

## Enabling 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.

