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If you have problems with the software, please contact your local Oracle Support Services.
This Concepts and Procedures Guide provides information and instructions to help you work effectively with Oracle Sales Online, Release 11i.

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

Introduction to Oracle Sales Online

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

Intended Audience

This guide is aimed at the following users:

- Administrators
- Sales Representatives
- Sales Managers
- Sales Executives
Structure

This manual contains the following chapters:

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

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

Related Documentation and Resources

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

**Installing Oracle Applications, Release 11i**
This manual documents the Rapid Install installation process.

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

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

**Oracle Applications Product Update Notes, Release 11i**
This document contains information about new product features and functions for various Oracle applications.

**Oracle Applications System Administrator’s Guide**
This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.
**Oracle Applications User’s Guide**
This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11i.

**Additional Product-Related Documentation**

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

*Implementing Oracle HRMS*
This document provides the information necessary to implement Oracle HRMS.

*Oracle CRM Foundation Implementation Guide*
This guide describes set up and configuration tasks for all the foundation components.

*Oracle CRM Foundation Technical Reference Manual*
This manual contains table and view descriptions for all the Oracle CRM foundation components.

*Oracle Inventory User’s Guide*
This guide contains information about product features and functions for Oracle Inventory.

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

*Oracle Marketing Online Encyclopedia Concepts and Procedures*
This document is a printed compilation of the Oracle Marketing Online Encyclopedia online help system.

*Oracle Incentive Compensation Implementation Guide*
This guide describes set up and configuration tasks required to implement Oracle Sales Compensation.

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

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.
Understanding Oracle Sales Online

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

These links take you to key concepts used in Oracle Sales Online.

- Understanding Trading Community Architecture
- Understanding Sales Methodology
- Overview of Functionality
- New in this Release
- Navigating Oracle Sales Online

These links take you to the features and functions in Oracle Sales Online.

- Your Home Page
- Calendar Tab
- Lead Tab
- Opportunity Tab
- Quotes Tab
- Forecast Tab
- Customer Tab
- Partner Tab
- Compensation Tab
- Fulfillment Tab
Understanding Trading Community Architecture

Oracle Trading Community includes a database schema, api’s, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together.

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

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

The key entities in the Oracle Trading Community data model are listed below:

- **Party**: an entity that can enter into business relationship
  - **Organization**
  - **Person**
  - **Group**
- **Location**: a point in geographical space described by a street address
Understanding Sales Methodology

Sales Methodology provides sales representatives with a series of steps, also referred to as sales stages, depending on the sales methodology the sales rep chooses when they create the opportunity. Each sales stage requires a set of action items or tasks that should be performed at that sales stage.

As a sales rep, when you create an opportunity you must select a sales methodology from the drop down list. Once you have created the opportunity, the tasks associated with that particular sales methodology are automatically generated.

Only Sales Online Administrators can create, modify, or delete sales methodologies. A sales methodology cannot be deleted if it is currently being used by any opportunity.

Please note, sales methodology naming conventions allow for the use of symbols (e.g., $, #, %).

Return to Oracle Sales Online Main Menu
Overview of Functionality

Oracle Sales Online includes the following functionality:

- Customer and Contact Management
- Opportunity Management
- Opportunity and Product Category Forecasting
- Notes, Tasks, and Attachments
- Interactions
- Partners
- Incentive Compensation
- Collateral Fulfillment
- Marketing Encyclopedia System

Customer and Contact Management

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

Opportunity Management

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

Opportunity and Product Category Forecasting

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

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

<table>
<thead>
<tr>
<th>Level</th>
<th>How it works</th>
</tr>
</thead>
</table>
Managers can create their own views of their sales representatives’ forecasted opportunities and can also track forecast adjustment history.

**Notes, Tasks, and Attachments**

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

Users can create and assign tasks to themselves or other sales team members. Tasks are organized in a summary page which can be personalized through the Activity profile preferences.

**Interactions**

Oracle Sales Online users have visibility into all customer touch points through integration with the Oracle eBusiness suite of applications and can view interactions performed by other systems and/or individuals.

**Partners**

Users can take advantage of the expanded definition of partner relationships and integration with Partners Online for indirect selling channels. Using the exchange server, Opportunity Exchange can also be used for co-selling.

**Incentive Compensation**

Integration with Oracle Incentive Compensation enables Oracle Sales Online to align sales force behavior with business goals and imperatives.
Sales representatives can view their compensation summary and break down their commissions by deal, product line, period, adjustments, and transactions.

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

Through integration with Oracle Incentive Compensation, sales managers and executives can plan and distribute quotas to different sales groups and/or professionals through a simple HTML interface.

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

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

**New in this Release**
The following new features have been added to Oracle Sales Online in this release.

- Home Page Metrics, Charts, and Reports
- Personalization and Configuration
- Inbox Indicators
- Customer Accounts
- Global Address Formatting
- Contact Restrictions
- Integrated Task and Calendar Management
- Lead Management
- Sales Methodology
- Forecast Date on Opportunity Line
- Quote to Order
FORECASTING

ADMINISTRATION

HOME PAGE METRICS, CHARTS, AND REPORTS
Oracle Sales Online provides even more home page tools. Users can choose from opportunity, lead, and forecast bins that provide key metrics about win/loss, pipeline status, and forecast progression with drill down capabilities to the next level of metrics.

PERSONALIZATION AND CONFIGURATION
Oracle Sales Online provides extended capability around descriptive flexfields to include context sensitive and dependent types. The ability to perform advanced searches on descriptive flexfields is also supported. Users are able to sort columns by clicking the column header.

INBOX INDICATORS
Oracle Sales Online introduces a new feature designed to improve personal productivity. Summary pages display inbox indicators to more easily identify new and updated records.

CUSTOMER ACCOUNTS
This release of Oracle Sales Online introduces additional functionality through leveraging the TCA model. Customer accounts allows salespeople to have visibility into their financial relationship between their customer and their enterprise. Accounts allow users to track information such as payment terms, account balance sites, roles, and relationships.

GLOBAL ADDRESS FORMATTING
Users can view address screens dynamically displayed based on the address styles setup by the system administrator. This feature tailors the screen display to provide only the fields relevant to a particular address format.

CONTACT RESTRICTIONS
In this release, salespeople are able to capture restrictions that contacts have requested with regard to when they want to be contacted. This feature helps to provide a higher level of customer satisfaction by capturing contact specific preferences.
Integrated Task and Calendar Management
This release provides full integration of tasks and calendar by leveraging the Oracle Foundation’s task and calendar modules. The key calendar functionality includes scheduling appointments, checking attendee availability, invitations, viewing public calendars, sharing calendar with team members, scheduling recurring events, and multiple calendar views (daily, weekly, monthly, and yearly).

Lead Management
Salespeople are able to create their own leads, have leads routed to them from other reps or have leads assigned to them directly using the lead import feature and territory manager. Salespeople are able to manage their leads by reassigning, qualifying and ranking their leads. Users will also be able to link leads to existing opportunities or convert a lead to a new opportunity.

Sales Methodology
Salespeople will now be able to choose a sales methodology when working on an opportunity. The sales methodology guides the salesperson through a set of tasks as the opportunity progresses through the sales cycle. These tasks are designed to ensure a successful outcome for the opportunity.

Other features:
- Predefined sales stages
- Auto creation of tasks
- Provides sales aids through attachments
- Workflow enabled for easy configuration

Forecast Date on Opportunity Line
This release introduces the concept of forecast dates for each opportunity line. This allows salespeople to create one opportunity distributed over multiple forecast periods, which will prove especially useful when tracking opportunities with ongoing revenue streams or multiple shipping schedules.

Quote to Order
Salespeople can convert an opportunity into a quote, configure quote lines, check availability, select pricing agreements, apply manual price overrides, print a quote, and place an order.
Forecasting
This release includes new forecasting features designed to streamline the forecasting process for salespeople. You can automatically generate product category and opportunity worksheets; and generate global forecasts for multiple periods with the click of a button.

Administration
This release provides administrators with the tools necessary to perform system setups and maintenance using the HTML self service user interface.

Navigating Oracle Sales Online
Navigating through Oracle Sales Online is intuitive. The tabs indicate the first layer of information, the subtabs show further details, and the links take you to even more detailed information about the item.

Your internet browser also changes the way the application works. For example, if you refresh or reload a page using the Opportunity > Relationship page, you will be asked if you want to "Repost from data? Yes or No". If you select Yes, it will appear as if you added a new relationship row to the opportunity.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab</td>
<td>Tabs are the major navigation tool you can use to quickly go to another area of functionality.</td>
</tr>
<tr>
<td>Subtab</td>
<td>Subtabs are used to indicate further functionality under a tab.</td>
</tr>
<tr>
<td>Link or Hyperlink</td>
<td>Links are used to take you to another level of detail under the subtab.</td>
</tr>
<tr>
<td>Asterisks</td>
<td>Fields marked with an asterisk are mandatory to perform that particular function.</td>
</tr>
<tr>
<td>Page with Star</td>
<td>New items on a summary table are indicated by a page with a star next to it.</td>
</tr>
<tr>
<td>Round Dot</td>
<td>Indicates record was updated by another user.</td>
</tr>
<tr>
<td>Erase button</td>
<td>The Erase button is used to clear fields enter on a page that has not been updated yet. For example, if you enter information for a new opportunity but decide to change the information, click the Erase button to clear the fields.</td>
</tr>
</tbody>
</table>
Lock icon  If you see a Lock icon next to an item in a summary table, it means that you do not have access to change or update the information for that item.

Quick Find  Select an item and enter a full or partial search string, using % as a wildcard. Click Go. Quick Find searches replace blank spaces with wildcards.

Advanced Search  Click the Advanced Search link and enter search filters, display options, and sort options. You can name the search and save it. Advanced search includes a security check. If you do not have access to the records you are searching for in Advanced Search, they will not be displayed.

Depending on the responsibility assigned to you by the Oracle Sales Online system administrator or your manager, you can perform functions from the following tabs. These links take you to the features and functions in Oracle Sales Online.

- Your Home Page
- Calendar Tab
- Lead Tab
- Opportunity Tab
- Quotes Tab
- Forecast Tab
- Customer Tab
- Partner Tab
- Compensation Tab
- Fulfillment Tab
- Administration Tab
Using Oracle Sales Online

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

- Getting Started
- Managing Account Settings
- Personalization
- Setting Sales Online Preferences

Getting Started

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

The following profiles and preferences are set through the Profile icon located at the top right of the application window:

Managing Account Settings

Use the Account Settings section to manage the following information:
- Changing Your Password
- Updating Your Personal Information

Changing Your Password

Navigation
Profile > Account Settings > Change Password

Steps
1. Enter your current password.
2. Enter your new password. Your password must be at least six characters long. You can use numbers or letters.

3. Re-enter your new password.

4. Click **Update**.

   **Note:** You cannot update your user name.

---

### Personalization

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

Please remember, you must click **Update** after changing information in each page. The following preferences can be set or changed from this subtab:

- **Navigation Preferences**
- **Display Preferences**
- **Quick Menu**

---

### Navigation Preferences

**Navigation**

Profile > Personalization > Navigation Preferences

**Current Responsibility**

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

**Default Responsibility**

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

**Navigation**
Profile > Personalization > Display Preferences

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

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

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

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

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

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

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

**Navigation**
Profile > Personalization > Quick Menu

**Add/Delete Page in Your Favorite List**
Coming soon.

Setting Sales Online Preferences

**Navigation**
Profiles > Sales Online Preferences >

The following preferences are available:
- Setting General Preferences
- Setting Home Page Preferences
- Setting Activity Preferences
- Setting Leads Preferences
- Setting Opportunity Preferences
- Setting Forecasting Preferences
- Setting Customer Preferences
- Setting Compensation Preferences

Setting General Preferences

Use the General Preferences page to set the defaults for fields that are applicable to several tabs.

**Navigation**
Profiles > Sales Online Preferences > General

**Steps**
Default Country: From the drop down list, choose the default country that will be used throughout the application.
Default Role: From the drop down list, choose which role you want as your default. If you have more than one role, this role will appear as the default.

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

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

Track Records for ‘N’ Days: Enter a number of days for which you want to track records. The value must not exceed 14 days. Setting the value to zero will disable the feature.

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

Enable Record Counting: Select the check box to show the number of records in a table, e.g., 1-31 of 100. Please note, if you disable record counting, the "Next" button will be active even if there are no more records to view. However, if you enable record counting the "Next" button will not display if there are no additional records.

Enable Quick Find: Select the check box to enable the Quick Find feature.

Click Update to save your changes.

Back to Setting Sales Online Preferences

Setting Home Page Preferences

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

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

Navigation
Profiles > Sales Online Preferences > Homepage

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

Under Bin Preferences, you can configure up to nine bins on your home page; the bins include New Leads, Won Opportunities, Open Opportunities, Activity, Win/Loss, System Counts, Opportunity Variance, and My Forecasts. The Won Opportunities bin does not require you to indicate win probability, sales stage, or status. Select the “Include Report” checkbox to include the bin on the “My Favorite Reports” bin.

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

News Preferences: To set up the News preferences, enter the stock symbol of the company you want to get news headlines for and enter the number of headlines you want to see.

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

Chart Preferences: To display a chart on your home page, select your preferences from the drop down lists. You can select up to two pie charts to appear on your home page. You must configure and save your charts within Customer, Forecast, Leads, or Opportunity in order for them to be displayed on your home page.

Click Update to save your changes.

Back to Setting Sales Online Preferences

Setting Activity Preferences

The following preferences determine the defaults that are set when creating new tasks.

Navigation
Profiles > Sales Online Preferences > Activity

Steps
Default Type: Choose the default task type from the drop down list. This is the default type that will appear when you create a new task.

Default Status: Choose the default status from the drop down list. This is the default status that will appear when you create a new task.

Default Priority: Choose the default priority from the drop down list. This is the default priority that will appear when you create a new task.
**Display Tasks for Last ‘N’ Days:** Enter a number to indicate the number of past days for which you would like to display tasks as the default for the Organization, Person, and Opportunity tasks only. Activity tab tasks are based on the saved, or default, query.

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

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

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

**Back to Setting Sales Online Preferences**

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**Setting Leads Preferences**

**Navigation**
Profiles > Sales Online Preferences > Leads

**Steps**
From the Leads Preferences page, you can set your defaults for the following:

**Default Status:** Select the default status that will be used when a lead is created.

**Default Channel to:** Select a default channel that will be used when a lead is created.

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

**Back to Setting Sales Online Preferences**
Setting Opportunity Preferences

Navigation
Profiles > Sales Online Preferences > Opportunity

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

Default Sales Stage: Choose from the drop down list. This is the default sales stage that will be used when you create a new opportunity. It is important to note, if a sales methodology is selected for an opportunity, the default sales stage preferences are not used.

Default Win Probability: Choose from the drop down list. This is the default win probability (the probability that the sale will be won) that will be used when you create a new opportunity.

Default Status: Choose from the drop down list. This is the default status that will be used when you create a new opportunity.

Default Close Date to 'N' Days Ahead: Enter the default number of days to plan you default close dates. This is the default close date that will be used when you create a new opportunity.

Default Channel To: Choose either direct or indirect from the drop down list. This is the default channel that will be used when you create a new opportunity.

Default Sales Methodology: Choose from the drop down list. This is the default sales methodology that will be used when you create a new opportunity. It is important to note, if a sales methodology is selected for an opportunity, the default sales stage preferences are not used.

Default Response Code: Select a default response code from the drop down list.

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

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

Note: The seeded search, “My Opportunities”, cannot be removed because it is the system wide default.
Setting Forecasting Preferences

Navigation
Profiles > Sales Online Preferences > Forecasting

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

Default Forecast Period Type: Select from the drop down list. This is the default forecast period type that will be used when you create a new forecast.

Default Forecast Currency: Select from the drop down list. This is the default forecast currency that will be used throughout forecasting.

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

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

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

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

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

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

Click Update to save your changes.

Back to Setting Sales Online Preferences
Setting Customer Preferences

Click Update to save your changes.

Back to Setting Sales Online Preferences

Setting Customer Preferences

Navigation
Profiles > Sales Online Preferences > Customer

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

Default Organization Phone Type: Select from the drop down list. This is the default organization phone type that will be used when creating a new organization.

Default Person Phone Type: Choose from the drop down list. This is the default person phone type that will be used when creating a new person.

Default Customer Category: Choose from the drop down list. This is the default customer category that will be used when creating a new customer.

Default Address Type: Select from the drop down list. This is the default address type that will be used when creating a new customer.

Default Organizational Relationship: Choose from the drop down list. This is the default organizational relationship that will be used when creating a new relationship.

Default Person Relationship: Choose from the drop down list. This is the default person relationship that will be used when creating a new relationship.

Display Interactions for Last "number" of Days: Enter a number.

Default Account Site Use: Select from the drop down list. This is the default account site that will be used when creating a new customer.

Default Customer Language: Select from the drop down list.

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

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

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

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**Setting Compensation Preferences**

**Navigation**
Profiles > Sales Online Preferences > Compensation

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

**Default Period:** From the Compensation Preferences page, set your Default Period (e.g., month, quarter, year) to use when running compensation reports by selecting from the drop down list.

Click **Update** to save your changes.

Back to Setting Sales Online Preferences

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**Your Home Page**

The Home tab consists of Home, Tools, Marketing, News, and Encyclopedia subtabs. Your home page displays bins, reports, and charts based on your home page preferences. You can also view the details of your bins by clicking the links in each bin.

The following are brief descriptions of each subtab:

- **Home** - You can view different summary reports and charts from your home page by indicating your preferences through Administration > Home Page > Home Page Bins.
Viewing Bins on the Home Page

- **Tools**-includes External Tools such as Travel Reservations, and Internal Tools, such as Territory Lookup, Resource Lookup, and Group Lookup.
  - Using Territory Lookup
  - Using Resource Lookup
  - Using Group Lookup

- **Marketing**-Display marketing information.
- **News**-Display news information from the Marketing Encyclopedia System such as world, industry, internal, and competitor news from your homepage. Indicate your preferences in Profiles > Homepage.

- **Encyclopedia**-Oracle Sales Online’s Encyclopedia subtab includes four subtabs; Category, My Channels, Publish, and Administration.

Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories.

Channels can be classified as content or group and their access can be set to public or private. If you do not know the correct channel to use when publishing a document, then MES assigns the document to the correct channel by matching the document attributes to the channel attributes.

For more detailed information on using Marketing Encyclopedia System, please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures Guide*.

**Related Information**

See Administration Tab for more information.

**Viewing Bins on the Home Page**

**Navigation**

Profile > Sales Online > Home Page

Bins are snapshot reports of selected data in Oracle Sales Online. It is important to understand that percentages shown in bins are based on counts, and not amounts.

A list of the available bins:
Viewing Charts on the Home Page

You can display charts on the home page.

- Open Opportunities bin shows the pipeline Amount For Forecastable opportunities within the period or parameters indicated. This bin does not check the status of the opportunity.

- Won Opportunities bin shows the won amount for forecastable opportunities within the period or parameters indicated. This bin does not check the status of the opportunity. If an opportunity does not have a campaign name associated with it, the report will display 'No Description' and the number of opportunities without any particular campaign name.

- My Forecast bin provides a list of all submitted forecast numbers by period.

- My Leads bin provides a count and amount of leads assigned to the user per period. The leads bin does not use forecast currency.

- Favorite Reports bin provides a list of all the reports that you have saved

- System Counts bin provides an overview of all activities in the system.

- Opportunity Variance bin includes the following seeded reports:
  - Closed opportunities within the last 7 days
  - Opportunities about to close in the next 7 days
  - Opportunities lost within the last 7 days
  - Opportunities about to lose which includes all the opportunities with a low win probability (below 20) and which are about to close within the next 7 days
  - High Value, Low Probability opportunity list
  - High Value, short time to close opportunity list
  - Aging opportunities list

- Win/Loss bin: Win Loss analysis is an effective tool used by management to measure the sales effectiveness of the organization. The percentage data is based on the total opportunity amounts.

Return to Oracle Sales Online Main Menu
Navigation
Profile > Sales Online > Home Page

The following is a list of available charts:
- Opportunity Chart by Close Date
- Opportunity Chart by Status
- Opportunity Chart by Win Probability
- Forecast History (self)
- Forecast History (group)
- Customer Chart by Top Customers
- Lead Chart by New Leads

Click the Add New Rows button to add new charts to your home page list. Select from the drop down list and click Update.

Return to Oracle Sales Online Main Menu

Using Territory Lookup

This tool provides a way for Oracle Sales Online users to locate the sales representative responsible for a particular territory. Please refer to the Oracle CRM Foundation Concepts and Procedures guide for more information about the Territory Lookup Tool.

Navigation
Home > Tools

Prerequisites
None

Steps
Follow these steps to use the Territory Lookup Tool:

1. Enter a full or partial organization name, using % as a wildcard.
2. Click Go.
Using Group Lookup

3. Select an organization from the search results page.
4. Optionally, select a country from the drop down list.
5. Optionally, select a state from the drop down list.
6. Optionally, enter a county.
7. Optionally, enter a city.
8. Optionally, enter a postal code.
9. Click **Search**.

Return to Oracle Sales Online Main Menu

Using Resource Lookup

This tool provides Oracle Sales Online users with a way to search for resources.

**Navigation**
Home > Tools

**Prerequisites**
None

**Steps**
1. Click the **Resource Lookup** link.
2. Enter the applicable information for the resource for which you want to search.
3. Click **Search**.

Return to Oracle Sales Online Main Menu

Using Group Lookup

**Navigation**
Home > Tools

**Prerequisites**
None
Steps
This tool provides Oracle Sales Online users with a way to search for groups.

1. Click the Group Lookup link.
2. Enter the applicable information for the group for which you want to search.
3. Click Search.

Return to Oracle Sales Online Main Menu

Calendar Tab
The Calendar tab includes the Views, Tasks, and Notes subtabs. You can use the Calendar tab to manage your tasks, appointments, and calendar.

You can perform the following functions from the Calendar tab:

- Personalizing Task Summary
- Using Calendar Views
- Creating a Task
- Maintaining Task Details
- Searching for a Task
- Creating a Quick Task
- Searching for a Quick Task
- Adding an Attachment to a Task

Return to Oracle Sales Online Main Menu

Personalizing Task Summary
You can personalize your task summary page with the Personalize button.

Navigation
Calendar

Prerequisites
None
Steps
Follow these steps to define your personal list of tasks:

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

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

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

**Return to Calendar Tab**

Using Calendar Views

You can use the calendar to track your daily, weekly, and monthly appointments and tasks. Under the Calendar subtab, there are three options; Views, Tasks, and Notes. The following is a list of the views available in Oracle Sales Online’s Calendar:

- Daily View
- Weekly View
- Monthly View
- Yearly View
- Combination View
- Availability
- Public Calendar
- Appointments

For detailed instructions on how to create, update, or delete appointments, please refer to the *Oracle CRM Foundation Concepts and Procedures* guide.
Creating a Task

Navigation
Calendar

Prerequisites
None

Steps
Follow these steps to create a task:

1. Click Create.

   The Create Task page opens.

The following table describes the Task Detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Type</td>
<td>Yes</td>
<td>Select the task type from the drop down list.</td>
</tr>
<tr>
<td>Private</td>
<td>No</td>
<td>Select the private check box if you want the task to be viewable only by the creator of the task.</td>
</tr>
<tr>
<td>Task Name</td>
<td>Yes</td>
<td>Enter the task name.</td>
</tr>
<tr>
<td>Task Description</td>
<td>No</td>
<td>Enter a description.</td>
</tr>
<tr>
<td>Priority</td>
<td>No</td>
<td>Select priority from the drop down list.</td>
</tr>
<tr>
<td>Date</td>
<td>Yes</td>
<td>Select a date by clicking the calendar and choosing a date.</td>
</tr>
<tr>
<td>Start Time</td>
<td>No</td>
<td>Select a time from the drop down lists.</td>
</tr>
<tr>
<td>Owner</td>
<td>Yes</td>
<td>Enter the full or partial name, using % as a wildcard, and click Go. Select from the search results.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>Select the task status from the drop down list.</td>
</tr>
<tr>
<td>End Time</td>
<td>No</td>
<td>Select an end time for the task from the drop down list.</td>
</tr>
<tr>
<td>Add Attendee</td>
<td>No</td>
<td>Select attendees by entering the full or partial name and clicking Go.</td>
</tr>
</tbody>
</table>
Maintaining Task Details

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

**Navigation**

Calendar

**Prerequisite**

A task must exist.

**Steps**

Follow these steps to maintain task details:

1. Search for the task that you want to edit.

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

3. To search using **Quick Find**:
   
   1. Choose Task from the drop down list.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>No</td>
<td>To remove an attendee, select the remove check box.</td>
</tr>
<tr>
<td>Employee</td>
<td>No</td>
<td>Displays the employee who is listed as an attendee.</td>
</tr>
<tr>
<td>Sales Group</td>
<td>No</td>
<td>Displays the sales group the attendee belongs to.</td>
</tr>
<tr>
<td>Job Title</td>
<td>No</td>
<td>Displays the job title of the attendee.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>No</td>
<td>Displays the phone number of the attendee.</td>
</tr>
<tr>
<td>Email</td>
<td>No</td>
<td>A link to the attendee’s email.</td>
</tr>
<tr>
<td>Remove</td>
<td>No</td>
<td>Select the remove check box to remove a relate to item.</td>
</tr>
<tr>
<td>Type</td>
<td>No</td>
<td>Displays the related item type.</td>
</tr>
<tr>
<td>Name</td>
<td>No</td>
<td>Displays the related item name.</td>
</tr>
</tbody>
</table>
2. Enter the full or partial task name.
3. Click Go.
4. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Task Search page opens.
   2. Enter desired Task Information and Display Options, and click Search.
      You will see the Task Search Results page.
5. Select the task by clicking the task link.
6. Alternatively, click the Modify Search button change your search filters and display options.
7. Enter your updates.
8. Click Update.

The following table describes the task detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Type</td>
<td>Yes</td>
<td>Select the task type from the drop down list.</td>
</tr>
<tr>
<td>Private</td>
<td>No</td>
<td>Select the private check box if you want the task to be viewable only by the creator of the task.</td>
</tr>
<tr>
<td>Task Name</td>
<td>Yes</td>
<td>Enter the task name.</td>
</tr>
<tr>
<td>Task Description</td>
<td>No</td>
<td>Enter a description.</td>
</tr>
<tr>
<td>Priority</td>
<td>No</td>
<td>Select priority from the drop down list.</td>
</tr>
<tr>
<td>Date</td>
<td>Yes</td>
<td>Select a date by clicking the calendar and choosing a date.</td>
</tr>
<tr>
<td>Start Time</td>
<td>No</td>
<td>Select a time from the drop down lists.</td>
</tr>
<tr>
<td>Parent Task</td>
<td>N/A</td>
<td>View the parent task details by clicking the link.</td>
</tr>
<tr>
<td>Owner</td>
<td>Yes</td>
<td>Enter the full or partial name, using % as a wildcard, and click Go. Select from the search results.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>Select the task status from the drop down list.</td>
</tr>
<tr>
<td>End Time</td>
<td>No</td>
<td>Select an end time for the task from the drop down list.</td>
</tr>
</tbody>
</table>
Searching for a Task

**Navigation**

Calendar

---

### Field | Required Field | Description
--- | --- | ---
Add Attendee | No | Select attendees by entering the full or partial name and clicking Go.
Remove | No | To remove an attendee, select the remove check box.
Employee | No | Displays the employee who is listed as an attendee.
Sales Group | No | Displays the sales group the attendee belongs to.
Job Title | No | Displays the job title of the attendee.
Phone Number | No | Displays the phone number of the attendee.
Email | No | A link to the attendee’s email.
Primary Relate To | No | If you want to relate the task to another item, select from the drop down list, enter the full or partial name and click Go.
Secondary Relate To | No | If you want to relate the task to an additional item, select from the drop down list, enter the full or partial name and click Go.
Remove | No | Select the remove check box to remove a relate to item.
Type | No | Displays the related item type.
Name | No | Displays the related item name.
Task Name | No | Links to the child task details.
Task Type | No | Displays the child task type.
Date | No | Displays the child task date.

Return to Calendar Tab
Creating a Quick Task

Prerequisites
None

Steps
Follow these steps to search for a task:

1. To search using Quick Find:
   1. Choose Task from the drop down list.
   2. Enter the full or partial task name using % as a wildcard.
      Please note, to enter a search string, enter quotation marks around the search phrase you want to find. For example, to search for to do tasks, enter "to do".
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Task Search page opens.
   2. Enter desired Task Information and Display Options.
   3. Click Search.
   4. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Task Search Results page.

3. Select the task by clicking the task link.
   Alternatively, click the Modify Search button change your search filters and display options.

Return to Calendar Tab

Creating a Quick Task

Follow these steps to create a quick task:

Navigation
Calendar
Prerequisites
None

Steps
1. Click Create.
2. Select a Task Type from the drop down list.
3. Enter a Task Name, this is a required field.
4. Optionally, enter a Task Description.
5. Select a planned start date by clicking the Calendar icon, this is a required field.
6. Optionally, select a planned start time and end time by selecting from the drop down lists.
7. Select a Source from the drop down list. Enter a full or partial name using % as a wildcard and click Go.
8. Enter an Owner, as the default, the creator of the task is the owner. This is a required field.
9. To add an attendee, enter the full or partial name in the Add a Resource field and click Go.
10. To remove an attendee, select the Remove check box.
11. To add a contact or person, select from the drop down list and enter the full or partial name; click Go.
12. If you want to relate the task to another item, select the item from the drop down list.
13. Enter the full or partial name using % as a wildcard and click Go.
14. To remove a related item, select the Remove check box.
15. Click Create.

Return to Calendar Tab

Searching for a Quick Task
Follow these steps to search for a quick task:
Adding an Attachment to a Task

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

Follow these steps to add an attachment to a task:

**Navigation**
Calendar > Attachments

**Prerequisite**
A task must exist.

**Steps**
Search for the task for which you want to add an attachment.

1. To search using **Quick Find**:
   1. Choose Task from the drop down list.
   2. Enter the full or partial task name.
   3. Click Go.
To search using Advanced Search:
1. Click the Advanced Search link.
   The Task Search page opens.
2. Enter desired Task Information and Display Options, and click Search.
   The Task Search Results page opens.
3. Select the task by clicking the task link.
4. Click Attachments link.
5. Click Add.
   The Add Attachment page opens.
6. Enter a description, and click Text, File, or URL.
   - Enter text
   - Click Browse to search for a document
   - Enter the URL
7. Click Create.

Lead Tab

The Lead tab is used to view and manage leads. Leads are intended to capture the initial contact with potential customers, gathering just enough information to tell a sales organization whether or not there is sufficient interest on the part of the buyer. When a lead is entered into the system, it may be ranked and assigned to the appropriate sales resource.

Once enough key information has been gathered, a lead can be qualified by a sales rep or the system. When the sales rep feels that there is sufficient prospect interest in purchasing, the lead may be converted to an opportunity, or linked to an already existing opportunity.

Leads may be generated through different sources:
- Marketing: Based on marketing campaigns and trade shows, leads may be generated. These leads can be imported into the system through Lead Import.
Lead Tab

- TeleSales: TeleSales agents record lead information from phone calls into the system.
- Field Sales: Field Sales representatives record lead information from the field into the system.

The following functions are available from the Leads tab:

- Personalizing Leads
- Creating a Lead
- Maintaining a Lead
- Searching for a Lead
- Assigning a Lead Owner
- Ranking a Lead
- Qualifying a Lead
- Declining a Lead
- Attaching a Contact to a Lead
- Creating a Note (Lead)
- Creating a Task (Lead)
- Creating an Attachment (Lead)
- Converting a Lead to an Opportunity
- Linking a Lead to an Opportunity
- Appending Lead Lines to an Opportunity
- Adding an Internal Sales Team Member (Leads)
- Adding a Resource Team to a Sales Team (Leads)
- Adding an External Sales Team Member (Leads)
- Lead Reports

Return to Oracle Sales Online Main Menu
Personalizing Leads

**Navigation**
Leads > Leads > Personalize

**Prerequisites**
None

**Steps**
Follow these steps to personalize leads:

1. Click **Personalize**.
   The Leads page opens.
2. Change, add, or remove search parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Optionally, select the "Use as Summary Page Default" check box.
7. Click **Save** to save the search without applying it, or **Save and Apply Search** to save and apply the search.
   The search results will display the sales group members and subordinates because the sales group list of values is not restricted by the sales group that appears.
   Saved Searches appear in a drop down list on the Leads summary page.

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

**Return to Leads Tab**

---

**Creating a Lead**

Profile options set during implementation govern the way a lead is created. The profile option **OS: Address Required for Person** affects the application in the following ways:
If profile option value for OS: Address Required for Person is "Yes" then the address is mandatory for creating a person. Hence we force the user to go to "Create Person" page where the user must enter address while creating the person. In this case there are no empty rows in the contact table.

If the profile option value for OS: Address Required for Person is "No" then user can create contact without address. Hence we do not force the user to go to "Create Person" page. Instead the user can create a new person and a contact by entering data in empty rows in contact table. In this case the "Create Person" button is not displayed.

Additionally, the profile option OS: Address Required for Sales Lead affects the application by making the customer address mandatory when creating a lead for an organization if the profile option is set to Yes.

**Navigation**

Leads > Leads

**Prerequisites**

None

**Steps**

Follow these steps to create a lead:

1. Click **Create**.
   
   The Create Lead page opens.

2. Select a customer by typing the full or partial name using % as a wildcard.

3. Select a location from the drop down list.

4. Click **Go**.
   
   If you do not find the customer for which you wish to create a lead, click **Create Customer**.

5. From the search results page, select the radio button.
   
   Optionally, select "Return Name and Address" to attach the address from the selected line to the lead.

   Some customer information will populate the create lead page. Customer and Status fields are required fields.

   The next items are optional and are in no specific order.
In the Purchase Items section, enter a Product Category and click Go.

Enter an Item ID, click Go.

Enter the unit of measure, quantity, and budget amount.

Enter a Source Name and click Go.

Enter an Offer Code and click Go.

Enter a note by selecting the type and entering text

Add contacts

6. Click Create.

Return to Leads Tab

Maintaining a Lead

You can edit most lead information by using the following procedures. The detailed field tables allow you to quickly browse for fields that you want to reference.

Navigation
Leads > Leads

Prerequisites
A lead must exist.

Steps
Follow these steps to modify or update an existing lead:

Search for a lead.

1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Lead Search page opens.
2. Enter desired Lead Information and Display Options.

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

   You will see the Leads Search Results page.

4. Select the lead by clicking the lead link.

   The Lead Detail page opens.

   The following table describes the Lead Detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Name</td>
<td>Yes</td>
<td>Lead name</td>
</tr>
<tr>
<td>Customer</td>
<td>No</td>
<td>You can click the link to view the customer details.</td>
</tr>
<tr>
<td>Customer Address</td>
<td>No</td>
<td>You can edit information or change the location by clicking the Change Location button.</td>
</tr>
<tr>
<td>Project Name</td>
<td>No</td>
<td>Enter the full or partial name and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Assign To</td>
<td>No</td>
<td>If this field is left blank, the lead is automatically assigned.</td>
</tr>
<tr>
<td>Status</td>
<td>Yes</td>
<td>Select a status from the drop down list.</td>
</tr>
<tr>
<td>Channel</td>
<td>No</td>
<td>Select a channel from the drop down list.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>No</td>
<td>Select a time frame from the drop down list.</td>
</tr>
<tr>
<td>Source Name</td>
<td>No</td>
<td>Find a source code by entering the full or partial name and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Offer Code</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Total Budget</td>
<td>No</td>
<td>Enter the total budget and select a currency.</td>
</tr>
<tr>
<td>Decline Reason</td>
<td>No</td>
<td>A decline reason is required only if you click the Decline button. Enter a reason that the lead is being declined.</td>
</tr>
<tr>
<td>Close Reason</td>
<td>Yes</td>
<td>If lead status is set to &quot;dead lead&quot; or &quot;loss&quot;. Enter the reason that the lead is being closed.</td>
</tr>
<tr>
<td>Lead Number</td>
<td>No</td>
<td>View the lead number.</td>
</tr>
<tr>
<td>Urgent/Qualified</td>
<td>No</td>
<td>Select that the lead is urgent, qualified, or accepted with the check boxes.</td>
</tr>
<tr>
<td>Accepted</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Assigned Date</td>
<td>No</td>
<td>Read only field.</td>
</tr>
</tbody>
</table>
The following table describes the field in the Purchase Items region of Lead Details.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Rank</td>
<td>No</td>
<td>Select a lead rank from the drop down list.</td>
</tr>
<tr>
<td>Response Channel</td>
<td>No</td>
<td>Select a vehicle response code from the drop down list.</td>
</tr>
<tr>
<td>Budget Status</td>
<td>No</td>
<td>Select a budget status from the drop down list.</td>
</tr>
<tr>
<td>Remove</td>
<td>No</td>
<td>Select the remove check box to remove the purchase item.</td>
</tr>
<tr>
<td>Product Category</td>
<td>Yes</td>
<td>This field is required if you are entering purchase items.</td>
</tr>
<tr>
<td>Item ID</td>
<td>No</td>
<td>This field is determined by the product category.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>No</td>
<td>View the unit of measure.</td>
</tr>
<tr>
<td>Quantity</td>
<td>No</td>
<td>Enter the quantity.</td>
</tr>
<tr>
<td>Budget Amount</td>
<td>No</td>
<td>Required if a purchase item is entered.</td>
</tr>
<tr>
<td>Source Name</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Offer Code</td>
<td>No</td>
<td>Enter offer code</td>
</tr>
</tbody>
</table>

3. Click **Update** to save your changes.

4. Additionally, the links at the top of the page take you to further details about the lead.
   - **Contacts**-maintain contact information
   - **Sales Team**-maintain sales team information
   - **Tasks**-maintain tasks related to the lead
   - **Notes**-maintain notes related to the lead
   - **Attachments**-maintain attachments related to the lead
   - **Opportunities**-view opportunities related to the lead
Searching for a Lead

5. Click **Update** to save your changes.

Return to Leads Tab

Searching for a Lead

**Navigation**
Leads > Leads

**Prerequisites**
A lead must exist.

**Steps**
Follow these steps to search for a lead:

1. To search using **Quick Find**:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name using % as a wildcard.
   3. Click **Go**.

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click **Search**.
   4. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
      You will see the Leads Search Results page.
   5. Select the lead by clicking the lead link.
      The Lead Detail page opens.

Return to Leads Tab
Assigning a Lead Owner

A lead is re-routed by selecting another member of the sales force from the "Lead Owner" list of values.

Navigation
Leads > Leads

Prerequisites

Steps
Follow these steps to re-assign a lead:

1. From the Lead tab, search for the lead you want to re-assign.
   To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name using % as a wildcard.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click Search.
   4. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Leads Search Results page.
   5. Select the lead by clicking the lead link.
      The Lead Detail page opens.

2. In the Assign To field, enter a search string and click Go.
   Optionally, clear the Assign To field and let the Resource Manager re-assign the lead automatically.

3. From the list of values, select the sales team member to which you want to re-assign the lead.
Ranking a Lead

Lead ranking is a tool used to assist a sales person in prioritizing their assigned leads. Rank is derived by tallying the raw score assigned to the lead, based on the information provided, then comparing that score to rankings established by the system administrator. A sales rep has the option to override a system derived lead rank by selecting a different lead rank value from the drop down list and clicking the Update button.

For more information about Lead Importing, please refer to the *Oracle Sales Online Implementation Guide*.

Qualifying a Lead

Lead qualification is governed by the profile option OS: Auto Qualify Lead. If set to Yes, the Administrator decides what fields must have populated values in order for the lead to be qualified. If those fields are populated the lead would automatically be considered a qualified lead.

**Navigation**
Leads > Leads

**Prerequisites**
None

**Steps**
Follow these steps to indicate that a lead is qualified:

Search for a lead.

1. To search using **Quick Find**:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name using % as a wildcard.
   3. Click **Go**.
Declining a Lead

To search using **Advanced Search**:

1. Click the **Advanced Search** link.
   
The Lead Search page opens.
2. Enter desired Lead Information and Display Options.
3. Click **Search**.
4. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
   
   You will see the Leads Search Results page.
5. Select the lead by clicking the lead link.
   
The Lead Detail page opens.

3. From the Lead Detail page, select the Qualified check box.
4. Click **Update**.

**Return to Leads Tab**

### Declining a Lead

If you decline a lead, the decline reason is required and stored in the lead history. The lead is routed to the next available resource based on the territory setup. If there is no resource found, the lead is assigned to a default resource (set up in profile option OS:Default Resource ID for Sales Lead Assignment). If you have not set this profile option, the lead is assigned back to the user who declined the lead. Note, the decline reason is cleared and is displayed as a blank field.

Please note, declining a lead does not mean that you cannot update the lead details. If you are on the sales team within the territory that the lead belongs to, you have update access to the lead.

The lead will be sent through lead assignment again and the next qualified sales representative will have the option to decline or accept the lead. However, if you are the only person on the sales team that the lead is assigned to, it may return to you for acceptance once again.

**Navigation**

**Leads > Leads**
Prerequisites
A lead must have been assigned to you.

Steps
Search for a lead.
1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name using % as a wildcard.
   3. Click Go.
2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Leads Search Results page.
   4. Select the task by clicking the task link.
      The Lead Detail page opens.
   3. Select a Decline Reason from the drop down list. If you do not select a decline reason, you will receive an error message.
   4. Click the Decline button.
   5. Click Update.

Return to Leads Tab

Attaching a Contact to a Lead
Attach a contact to a lead by following these steps.

Navigation
Leads > Leads > Contacts
Prerequisites
A lead must exist.

Steps
Search for a lead.

1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name using % as a wildcard.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Leads Search Results page.
   4. Select the lead by clicking the lead link.
      The Lead Detail page opens.

3. Click the Contacts link.
   From this page you can create a person, contact, or relationship by adding the required information directly into the summary table. Or you can add a contact by following the next steps.

4. Add a contact by entering the full or partial name in the Add a Person field and clicking Go.
   The Select a Person page opens.

5. Select the person from the search results by clicking the Select check box OR search for all people or all contacts by selecting the radio button.

6. Click Select.

7. To remove a contact, select Remove and click Update.

8. To edit information directly onto the summary table, change the information.
Creating a Note (Lead)

Follow these steps to create a lead note:

**Navigation**

Leads > Leads > Notes

**Prerequisites**

None

**Steps**

Search for a lead.

1. To search using **Quick Find:**
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click **Go**.

2. To search using **Advanced Search:**
   1. Click the **Advanced Search** link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
      You will see the Leads Search Results page.
   4. Select the lead by clicking the lead link.
      The Lead Detail page opens.

3. Click the Notes link.

4. Select the note type from the drop down list.

5. Enter the note text in the text box.
6. Click Update.

**View All Notes**

**Steps**
Click All Notes.

**View Note History**

**Steps**
1. Select the type by choosing from the drop down list.
2. Select a date range by clicking the Calendar icon and choosing a date range.
3. Click Apply.

[Return to Leads Tab]

**Creating a Task (Lead)**

Follow these steps to create a lead task:

**Navigation**
Leads > Leads > Tasks

**Prerequisites**
None

**Steps**
Search for a lead.
1. To search using **Quick Find**:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.
2. To search using **Advanced Search**:
   1. Click the Advanced Search link.
Creating an Attachment (Lead)

Follow these steps to create a lead attachment:

**Navigation**
Leads > Leads > Attachments

**Prerequisites**
None

**Steps**
Search for a lead.
1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.
2. To search using Advanced Search:
   1. Click the Advanced Search link.

The Lead Search page opens.

2. Enter desired Lead Information and Display Options.

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

You will see the Leads Search Results page.

4. Select the lead by clicking the lead link.

The Lead Detail page opens.

3. Click the **Tasks** link.

4. Click **Create**.

5. Enter task details.

6. Click **Update** to add the task.

Return to Leads Tab
The Lead Search page opens.

2. Enter desired Lead Information and Display Options.

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

   You will see the Leads Search Results page.

4. Select the lead by clicking the lead link.

   The Lead Detail page opens.

3. Click the **Attachments** link.

4. Click **Add**.

5. Select a file, enter text, or enter the URL to attach.

6. Click **Update** to add the attachment.

**Return to Leads Tab**

---

### Converting a Lead to an Opportunity

Follow these steps to convert a lead to an opportunity. Please note, a lead can be converted into multiple opportunities.

**Navigation**

Leads > Leads

**Prerequisites**

A lead must exist.

**Steps**

Search for a lead.

1. To search using **Quick Find**:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.

2. To search using **Advanced Search**:
Linking a Lead to an Opportunity

Follow these steps to link a lead to an opportunity:

**Navigation**
Leads > Leads

**Prerequisites**
The lead and the opportunity must exist.

**Steps**
Search for a lead.

1. To search using **Quick Find**:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
Appending Lead Lines to an Opportunity

The Lead Search page opens.

2. Enter desired Lead Information and Display Options.

3. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
   You will see the Leads Search Results page.

4. Select the lead by clicking the lead link.
   The Lead Detail page opens.

3. Click the Lead to Opportunity button.
   The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.

4. Choose the "Select" button to indicate the opportunity you have selected.
   The Lead Linking Opportunity Detail page opens.

5. Click the Link to Opportunity button.
   Please note, linking a lead to an opportunity does not automatically add the user to the opportunity sales team.

Return to Leads Tab

Appending Lead Lines to an Opportunity

Follow these steps to link a lead to an opportunity:

Navigation
Leads > Leads

Prerequisites
The lead and the opportunity must exist.

Steps
Search for a lead.

1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Lead Search page opens.
   2. Enter desired lead information and display options.
   3. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Leads Search Results page.
   4. Select the lead by clicking the lead link.
      The Lead Detail page opens.

3. Click the Lead to Opportunity button.
   The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.

4. Choose the "Select" button to indicate the opportunity you have selected.
   The Lead Linking Opportunity Detail page opens.

5. Select the "Select" check box next to the lead lines you want to append to the opportunity.

6. Click the Append to Opportunity button.
   Please note, the user that appended the lead to the opportunity is automatically added to the opportunity sales team.

Sales Teams (Leads)

You can perform the following functions for sales teams:

- Add an internal sales team member
- Add a resource team to a sales team
- Add an external sales team member (partner)

Return to Leads Tab
Adding an Internal Sales Team Member (Leads)

Follow these steps to add an internal sales team member:

**Navigation**
Leads > Leads > Sales Teams

**Prerequisites**
None

**Steps**
Search for a lead.

1. To search using **Quick Find**:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.

2. To search using **Advanced Search**:
   1. Click the Advanced Search link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Leads Search Results page.

3. Select the lead by clicking the lead link.

4. Click the Sales Team link.

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

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

7. Select the "Select" check box.

8. Click Select.
   The salesperson will be added to the Sales Team summary table.
9. Enter the territory properties, and click **Go**.

10. Select a Role from the drop down list.

    You can view the email address and phone number for this salesperson.

11. Click **Update**.

    **Return to Leads Tab**

---

**Adding a Resource Team to a Sales Team (Leads)**

**Navigation**
Leads > Leads > Sales Teams

**Prerequisites**
None.

Please note, you can only add resource teams to internal sales teams.

**Steps**

Search for a lead.

1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click **Go**.

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
      You will see the Leads Search Results page.
   4. Select the lead by clicking the lead link.
      The Lead Detail page opens.
3. Click the Sales Team link.

4. In the "Add a Resource" field, enter the resource name or the wildcard (%) and click Go.

5. Select a resource from the search results page by clicking the link.

6. Click Update.

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

Adding an External Sales Team Member (Leads)

Navigation
Leads > Leads > Sales Teams

Prerequisites
None

Steps
Search for a lead.

1. To search using Quick Find:
   1. Choose Lead from the drop down list.
   2. Enter the full or partial lead name.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Lead Search page opens.
   2. Enter desired Lead Information and Display Options.
   3. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.
      You will see the Leads Search Results page.
   4. Select the lead by clicking the lead link.
The Lead Detail page opens.

3. Click the Sales Team link.
4. Click the External link.
5. Enter the partner name in the "Add a Partner" field, click Go.
6. Select a partner from the search results page by clicking the link.
7. To add a partner contact, enter the partner contact name and click Go.
8. Click Update.
9. To remove a partner, select the Remove check box and click Update.

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

Lead Reports

Under the Leads tab, you will find a Reports subtab. Click the subtab to view Lead reports.

- Viewing the Lead Import Status Report

Viewing the Lead Import Status Report

This report provides the status of the lead imports.

Navigation
Leads > Reports

Prerequisites
You must have imported leads.

Steps
1. Click the Lead Import Status Report link.
The Lead Import Status Report page opens.

2. Select a Processed Start Date and Processed End Date using the Calendar icon.
3. Select the Source System from the list of values.
4. If you want to rename the search and save it, enter a new search name in the Report Name field.
5. To Save the report without running it, click Save.
6. To Save and Run the report, click Save and Run Report.
7. To Run the report without saving it, click Run Report.

Return to Leads Tab

Opportunity Tab

One of the first steps in the Oracle Sales Online sales process is a sales opportunity, also referred to as a potential sale. This process begins with the initial customer contact, or lead, and ends when the sales rep converts the opportunity into a sale or loses the sale.

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

- Identify how the opportunity came about
- Enter information on items to be purchased
- Track the likelihood of closing the sale
- Allocate sales credit for forecasting

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

The following tasks can be performed from the Opportunity tab:

- Personalizing Opportunity Summary
- Creating an Opportunity
Personalizing Opportunity Summary

If you want to create personalized opportunity lists, for example, "My Opportunities Closing This Week" or "My Opportunities in Stage 3" follow the steps outlined below for personalizing. The lists that you create can be used as a summary page default so that they appear every time you click the Opportunity tab.

Navigation
Opportunity > Personalize
Prerequisites
None

Steps
Follow these steps to personalize opportunities:

1. Click **Personalize**.
2. Change, add, or remove parameters.
   
   The following is a description of the "Include Account Manager Privilege" check box and how it works:
   
   If a sales rep is an account manager for an organization, then he/she has access to all opportunities created for that organization.
   
   The "Include Account Manager Privilege" check box is important if the person running the advanced search is either an account manager OR if someone in their sales hierarchy has the "account manager" privilege.
   
   If the "Include Account Manager Privilege" check box is selected, the Advanced Search feature will display all opportunities for which:
   
   - the user is on the sales team
   - direct or indirect subordinates are on the sales team
   - all opportunities for the organization for which the user is an account manager
   - all opportunities for the organization for which a direct or indirect subordinate is an account manager
   
   If the "Include Account Manager Privilege" check box is not selected, the Advanced Search feature will display opportunities for which:
   
   - the user is on the sales team
   - subordinates are on the sales team

3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as a Summary Page Default check box.
Creating an Opportunity

Overview of Sales Methodology
Sales Methodologies are an important concept in understanding the way that Oracle Sales Online handles opportunities. When an opportunity is created, the Sales Rep has the option to select a Sales Methodology that is specific to the company’s business flows. Sales Methodologies provide sales representatives with a series of steps, also referred to as sales stages, depending on the sales methodology the sales rep chooses when they create the opportunity. Each sales stage requires a set of action items or tasks that should be performed at that sales stage.

As a sales rep, when you create an opportunity you must select a sales methodology from the drop down list. Once you have created the opportunity, the tasks associated with that particular sales methodology are automatically generated.

It is important to note, only Sales Online Administrators can create, modify, or delete sales methodologies. Additionally, a sales methodology cannot be deleted if it is currently being used by any opportunity.

Please note, sales methodology naming conventions allow for the use of symbols (e.g., $, #, %).

Navigation
Opportunity > Opportunity

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

Steps
Follow these steps to create a new opportunity:

7. Click Save to save the list, or Save and Apply Search to both save and apply the search.

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

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

Return to Opportunity Tab
1. Click Create.
   The Create Opportunity page opens.

2. Use the Select a Customer field and enter the full or partial name of the organization or person that you want to find. By default the system will search for organizations.

3. If the customer is located in a country outside of your country, select that country from the drop down list, click Go.
   The Select a Customer page opens with the search results.

4. If you are searching for a person, instead of an organization, select the Person radio button and click Go.

5. Select a customer by clicking the customer link or click Cancel to return to the previous page.

6. If you do not find the customer that you are searching for, click Create Customer. Enter the customer information and click Create.
   The Create Opportunity page opens.

7. The customer name and address, if selected, will be populated into the Create Opportunity page.

8. Enter an opportunity name, this value will be used throughout Oracle Sales Online to select and view opportunities.

9. Optionally, relate this opportunity to an existing project. Select the project and click Go. If you want to create a new project, select the Create a Project radio button and enter a project name.

10. Optionally, relate a campaign or offer to this opportunity. Enter the campaign name and click Go. You will also see a list of offers with the list of campaigns. If you select an offer (without a source name) using the offer list of values, then the source name you entered is cleared. Because there is a relationship between source name and offer, you must select a valid combination using either source name or offer.

11. Optionally, enter purchase items by selecting a Product Category and Amount. Please note, if you do not select a product category, that line will show a blank when you create the opportunity. You can search for inventory items by selecting a product category, entering a partial inventory item name and clicking Go. Choose from the list of inventory items. Additionally, select a Unit of Measure.
The list of Inventory Items is limited to the items that are mapped to the product category that you select. If product category is blank, you will see a full list of inventory items. When you choose an item, product category will be populated.

12. Optionally, enter Contacts. Add an existing person by entering the last name in the Add a Person field and clicking Go. To create a new person, the required fields are First Name, Last Name, and Relationship. Optional fields are phone number, email address, and opportunity role.

Note: When adding or creating a contact for this opportunity, you are also creating a relationship between this person and the customer for whom you are creating the opportunity.

13. To create a note, choose the Type from the drop down list. Select the Private check box, if you want to keep the note private. Enter the text in the Text box.

14. Click Create.

You have created the opportunity when the Opportunity Detail page opens. You can change data, enter additional information, go to the customer detail by clicking the customer name link. The creator of the opportunity is automatically added to the sales team (if the profile option OS: Sales Team Creator Keep Flag is set to Yes). By default, 100% of the sales credit is given to the opportunity creator. You can redistribute sales credits manually by going to the Sales Credits section of this document.

Return to Opportunity Tab

Maintaining Opportunity Detail

Follow these steps to maintain opportunity details:

Navigation
Opportunity > Opportunity

Prerequisites
An opportunity must exist.

Steps
Search for an opportunity.

1. To search using Quick Find:
1. Choose Opportunity from the drop down list.
2. Enter the full or partial opportunity name.
3. Click Go.

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      
      The Opportunity Search page opens.
   2. Enter desired Task Information and Display Options.
   3. Optionally, enter a Search Name, if you want to save the search.
   4. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
      
      The Opportunity Search Results page opens.

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

4. Add or update information such as Status, Sales Methodology, Win Probability, Close Date, Initiatives, Currency, Channel, Sales Stage, Budget, Transaction Amount by either selecting from the drop down list or entering information into the fields.

   The opportunity freeze flag facilitates the opportunity lock out feature for this specific opportunity. Once this check box is selected, no one on the sales team is allowed to update the opportunity. This Freeze check box overrides all access privileges. However, users whose “Update Frozen Opportunities” profile option is set to Y (Yes) can update frozen opportunities and deselect the Freeze check box. For more information about changing a profile option, refer to the *Oracle Sales Online Implementation Guide*.

5. From the Opportunity Detail main page, you can enter Purchase Items. Click the **Add Purchase Item** button to start the process. Required fields are marked with an asterisk.

   The Opportunity Add Purchase Item page opens.
   1. Select the Product Category from the drop down list.
   2. Enter an Amount.
   3. Optionally, enter the following:
      - Inventory Item: enter a partial item name and click **Go**
Searching for an Opportunity

Follow these steps to search for an opportunity:

Navigation

Opportunity > Opportunity

Prerequisites

An opportunity must exist.

Steps

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

2. To search using Advanced Search:
   1. Click the Advanced Search link.

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

An example of an advanced search follows:

If you want to search for opportunities closing in 30 days, enter 30 in the "Opportunities Closing in. . .Days" and select the display options. The advanced search will return results for opportunities closing 30 days before and after the system date.

---

**Leads (Opportunity)**

From the Opportunity tab, you can create leads. The step-by-step instructions are included in the next section, **Creating a Lead (Opportunity)**.

---

**Creating a Lead (Opportunity)**

Follow these steps to view leads:

**Navigation**

Opportunity > Opportunity > Leads

**Prerequisites**

None

**Steps**

Search for an opportunity.

1. To search using **Quick Find**:
   1. Choose Opportunity from the drop down list.
Creating a Lead (Opportunity)

2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.

3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search.

3. Click the opportunity link to select it.
   The Opportunity Detail page opens.

4. Click the Leads link.

5. Click the Create button.
   The Create Lead page opens.

6. Select a customer by typing the full or partial name using % as a wildcard.

7. Select a location from the drop down list.

8. Click Go.
   If you do not find the customer for which you wish to create a lead, click Create Customer.

9. From the search results page, click the customer’s link.
   Some customer information will populate the create lead page. Customer and Status fields are required fields.
   The next items are optional and are in no specific order.
   - In the Purchase Items section, enter a Product Category and click Go.
   - Enter an Item ID, click Go.
   - Enter the unit of measure, quantity, and budget amount.
   - Enter a Campaign and click Go.

10. Click Create.

Return to Opportunity Tab
Copying an Opportunity

Follow these steps to copy an existing opportunity:

**Navigation**
Opportunity > Opportunity

**Prerequisites**
An opportunity must exist.

**Steps**
Search for an opportunity.
1. To search using **Quick Find**:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.
2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Click **Search**.
   4. Select an opportunity by clicking the opportunity link.
      The Opportunity Detail Main page opens.
3. From the Opportunity Detail main page, click **Copy**.
   The Copy Opportunity page opens.

   Copy Opportunity will create a new opportunity from this opportunity. You can select which attributes you want to copy by following the next steps.

4. If necessary, enter new customer and address information in place of the existing information. This information replaces any customer or address information brought over when you copied the opportunity. The address of the new opportunity is not the database value of the first opportunity, but rather what you have entered in the Copy page.
5. Select “Copy Attributes” by clicking the check box next to items such as; Purchase Items, Sales Team, Sales Credits, Competitors, Opportunity Contacts, Sales Methodology.

6. It is important that you click the **Update** button before the next step.

7. Click **Copy**.

   The opportunity contacts cannot be copied if the user changes the customer for the copied opportunity.

Return to Opportunity Tab

**Creating a Quote from an Opportunity**

Follow these steps to create a quote from an opportunity:

**Navigation**

**Opportunity > Opportunity**

**Prerequisites**

An opportunity must exist.

**Steps**

Search for an opportunity.

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

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Optionally, enter a Search Name, if you want to save the search.
   4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
5. Select the opportunity from the search results page by clicking the opportunity link.
   
The Opportunity Detail page opens.
3. Click Create Quote.
   
The Create Quote page opens. The opportunity details are populated into the create quote page.
4. Enter the quote name, a required field.
5. Optionally, select a "Relate To" from the drop down list and enter the related entity.
6. Enter an Invoice Address. To change the address, click Change Address.
7. Find a Customer Contact by entering the full or partial name and clicking Go.
8. Select a Channel from the drop down list.
9. Select an Expiration Date by clicking the Calendar icon and choosing a date.
10. In the Items section, Add an Item by entering the item name in the text box and clicking Go.
11. Select the item from the search results page.
12. To remove an item, select the Remove check box.
13. In the Notes section, enter a note by selecting the note type from the drop down list.
14. Enter the note text.
15. Click Create.

Return to Opportunity Tab

Adding Purchase Items (Opportunity)

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

Navigation
Opportunity > Opportunity
Adding Purchase Items (Opportunity)

Prerequisites
None

Steps
Follow these steps to add a purchase item:

1. Select an Opportunity from the summary table or use the Quick Find feature to search for an opportunity.
   To search using Quick Find:
   1. Choose Opportunity from the drop down list.
   2. Enter a the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click Go.

2. Click Add Purchase Items.
   The Opportunity Add Purchase Item page opens.

3. Select the Product Category from the drop down list.

4. Select an Inventory Item by entering a partial name, use the "%" key as a wild card, and click Go.

5. Enter the Quantity and Unit of Measure (UOM).

6. Enter the Amount, it is a required field.

7. Select a Campaign by entering a partial name, use the "%" key as a wild card, and click Go.

8. Enter the number of Purchase lines that you want to split your purchase lines into.

9. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.

10. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.

11. Click Add to create multiple purchase lines with forecast dates in above mentioned intervals.

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

Return to Opportunity Tab
Sales Credits (Opportunity)

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

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

- Maintaining Sales Credits (Opportunity)
- Adding a Salesperson to Receive Sales Credits (Opportunity)
- Adding a Partner to Receive Sales Credits (Opportunity)

Return to Opportunity Tab

Maintaining Sales Credits (Opportunity)

Follow these steps to split sales credits:

**Navigation**

Opportunity > Opportunity > Sales Credits

**Prerequisites**

None

**Steps**

Search for an opportunity:

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

2. To search using **Advanced Search**:
   1. Click the Advanced Search link.
Adding a Salesperson to Receive Sales Credits (Opportunity)

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

**Navigation**
Opportunity > Opportunity > Sales Credits

**Prerequisites**
None

**Steps**
Search for an opportunity.

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

2. To search using **Advanced Search**:  
   1. Click the **Advanced Search** link.  
      The Opportunity Search page opens.  
   2. Enter search filters and display options.
Follow these steps to add a partner to receive sales credits:

**Navigation**
Opportunity > Opportunity > Sales Credits

**Prerequisites**
None

**Steps**
Search for an opportunity.
1. To search using **Quick Find**:  
   1. Choose Opportunity from the drop down list.  
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.  
   3. Click Go.

2. To search using **Advanced Search**:  
   1. Click the Advanced Search link.  
      The Opportunity Search page opens.
   2. Enter search filters and display options.
Adding an Existing Contact to an Opportunity

Follow these steps to add an existing contact:

**Navigation**
Opportunity > Opportunity > Contacts

**Prerequisites**
A contact must exist.

**Steps**
Search for an opportunity.

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

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.

      The Opportunity Search page opens.
2. Enter search filters and display options.
3. Click Search.
4. Select an opportunity by clicking the opportunity link. The Opportunity Detail page opens.
5. Click the Contacts link.
6. Enter the last name in the Add a Person field to search for a contact, click Go.
   - It is recommended that you search by last name only. This will search for people which have already established a relationship with this customer called contacts.
   - From the Select a Person page, choose from the list of search results by clicking the relationship link.
   - If you cannot find the person you are looking for, you can widen your search to look for all people checking the "Search All People" radio button.
   - If you select a person that does not have an existing relationship with this customer, you can choose a relationship type.

Creating a New Contact (Opportunity)

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

Navigation
Opportunity > Opportunity > Contacts

Prerequisites
None

Steps
Search for an opportunity.
1. To search using Quick Find:
   1. Choose Opportunity from the drop down list.
2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.

3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search.

3. Select an opportunity by clicking the opportunity link.
   The Opportunity Detail page opens.

4. Click the Contacts link.

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

6. Click Update to save the information.

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

Return to Opportunity Tab

**Notes (Opportunity)**

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

- Creating Notes (Opportunity)
- Viewing Notes (Opportunity)

Return to Opportunity Tab

**Creating Notes (Opportunity)**

Follow these steps to create a note:
Navigation
Opportunity > Opportunity > Notes

Prerequisites
None

Steps
Search for an opportunity.

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

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search. To apply the search and save the search as the same time, choose the Save and Apply Search button.
      The Opportunity Detail page opens.

3. Click the Notes link.

4. Select a Type from the drop down list.
   You can change the default type using Profiles.

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

6. Enter your notes in the Text box.

7. Click Create.

Note: You cannot edit notes once they are created.

Return to Notes (Opportunity) Main
Viewing Notes (Opportunity)

Follow these steps to view a note:

**Navigation**
Opportunity > Opportunity > Notes

**Prerequisites**
A note must exist.

**Steps**
Search for an opportunity.

1. To search using **Quick Find**:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click **Go**.
2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click **Search**.
3. Select the opportunity by clicking the opportunity link.
   The Opportunity Detail page opens.
4. Click the **Notes** link.
5. Select a Type from the drop down list.
   The default type can be changed using Profiles.
6. Choose the number of days for which you want the notes history.
7. Click **Apply**.
Adding a Sales Team Member (Opportunity)

Follow these steps to add a sales team member:

**Navigation**
Opportunity > Opportunity > Sales Team

**Prerequisites**
None

**Steps**
Search for an opportunity.

1. To search using **Quick Find**:
   1. Choose Opportunity from the drop down list.
2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.

3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search.

3. Select the opportunity by clicking the opportunity link.
   The Opportunity Detail page opens.

4. Click the Sales Team link.

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

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

7. Click the salesperson link. The salesperson will be added to the Sales Team summary table.

8. Enter the territory properties, and click Go.

9. Select a Role from the drop down list.

10. You can view the email address and phone number for this salesperson.

11. Click Update.

   Return to Sales Team (Opportunity) Main

Adding a Partner to a Sales Team (Opportunity)

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

Navigation
Opportunity > Opportunity > Sales Team
Prerequisites
None

Steps
Search for an opportunity.

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

2. To search using Advanced Search:
   1. Click the Advanced Search link.
   The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Optionally enter a Search Name, if you want to save the search.
   4. Click Search.

3. Click the opportunity link to select it.
   The Opportunity Detail main page opens.

4. Click the Sales Team link.

5. Enter the partner name in the "Add a Partner" field, click Go.

6. Select a partner from the search results page by clicking the link.

7. Click Update.

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

Return to Sales Team (Opportunity) Main

Adding a Resource Team to a Sales Team (Opportunity)

To add a resource team to a sales team, follow these steps:
Adding a Resource Team to a Sales Team (Opportunity)

Navigation
Opportunity > Opportunity > Sales Team

Prerequisites
None

Steps
Search for an opportunity.

1. To search using Quick Find:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wildcard.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Optionally enter a Search Name, if you want to save the search.
   4. Click Search.

3. Click the opportunity link to select it.
   The Opportunity Detail page opens.

4. Click the Sales Team link.

5. In the Add a Resource field, enter the resource name using % as a wildcard, click Go.

6. Select a resource from the search results page by clicking the link.

7. Click Update.

8. Members of resource team will be added to the sales team.

Return to Sales Team (Opportunity) Main
Removing a Sales Team Member (Opportunity)

Follow these steps to remove a sales team member:

**Navigation**
Opportunity > Opportunity > Sales Team

**Prerequisites**
A sales team member must exits on the sales team.

**Steps**
Search for an opportunity.

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

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

3. Click the opportunity link to select it.
   The Opportunity Detail page opens.

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

5. Locate the salesperson on the summary table and select the Remove check box.

6. Click **Update**.

Return to Sales Team (Opportunity) Main
Tasks (Opportunity)

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

- Creating a Task (Opportunity)
- Adding an Attachment to a Task (Opportunity)
- Maintaining a Task (Opportunity)

Creating a Task (Opportunity)

Navigation
Opportunity > Opportunity > Tasks

Prerequisites
None

Steps
Follow these steps to create a task:
Search for an opportunity.

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

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

3. Click the opportunity link to select it.
   
The Opportunity Detail page opens.

4. Click the **Tasks** link.

5. Click **Create**.

6. Select Task Type from the drop down list.

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

8. Enter the Task Name.

9. Enter the Task Description.

10. Choose the Priority from the drop down list.

11. Select the Status from the drop down list.

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

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

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

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

16. Click **Create**.

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

**Return to Tasks (Opportunity) Main**

---

**Adding an Attachment to a Task (Opportunity)**

**Navigation**

Opportunity > Opportunity > Tasks

**Prerequisites**

A task must exist.
Maintaining a Task (Opportunity)

Steps
Follow these steps to add an attachment to your task:

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

Maintaining a Task (Opportunity)

Follow these steps to maintain a task:

Navigation
Opportunity > Opportunity > Tasks

Prerequisites
A task must exist.

Steps
Search for an opportunity.

1. To search using Quick Find:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click Go.
2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
3. Enter Search Name, if you want to save the search.
4. Click Search.
3. Click the opportunity link to select it.
   The Opportunity Detail page opens.
4. Click the Tasks link.
5. Add or update information.
6. Click Update.
   Return to Tasks (Opportunity) Main

Adding a Classification (Opportunity)

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

Navigation
Opportunity > Opportunity

Prerequisites
None

Steps
Search for an opportunity.
1. To search using Quick Find:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click Go.
2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
Adding an Existing Competitor (Opportunity)

3. Enter Search Name, if you want to save the search.
4. Click Search.
3. Click the opportunity link to select it.
   The Opportunity Detail page opens.
4. Select the Classification link.
5. Select a Classification from the drop down list that best describes your opportunity.
6. Optionally, enter comments.
7. Click Update to save.
   To remove a classification, click the remove icon, and click Update.

Return to Opportunity Tab

Adding an Existing Competitor (Opportunity)

You can add information about the competitors that you are facing with this opportunity. By definition, competitors are organizations that have a competitive relationship with an internal organization. Please note, once you have selected the Competitor check box, the competitor is added to the competitor table. Even if you remove your selection of the check box, the competitor will remain in the competitor table.

Navigation
Opportunity > Opportunity

Prerequisites
None

Steps
Search for an opportunity.
1. To search using Quick Find:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
Creating a New Competitor (Opportunity)

3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search.

3. Click the opportunity link to select it.
   The Opportunity Detail page opens.

4. Select the Competitors link.

5. Use Add a Competitor to search for a competitor, click Go.

6. Select from the search results list.

7. Optionally, enter comments.

8. Click Update to save your changes.
   To remove a competitor, click the Remove icon and click Update.

Return to Opportunity Tab

Creating a New Competitor (Opportunity)

Navigation
Opportunity > Opportunity

Prerequisites
None

Steps
To create a new competitor, follow these steps:

1. From the Opportunity tab, create the internal organization, if one does not already exist.
Go to the Customers tab and create your company as an organization. Refer to the Create a New Organization section for step-by-step instructions. The required fields are Organization name and Address Line 1.

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

2. Next, create the competitor as an organization.

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

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

Return to Opportunity Tab

Attachments (Opportunity)

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

- Adding an Attachment (Opportunity)
- Viewing an Existing Attachment (Opportunity)

Return to Opportunity Tab

Adding an Attachment (Opportunity)

Follow these steps to add an attachment:
Navigation
Opportunity > Opportunity > Attachments

Prerequisites
None

Steps
Search for an opportunity.
1. To search using **Quick Find**:
   1. Choose Opportunity from the drop down list.
   2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
   3. Click Go.
2. To search using **Advanced Search**:
   1. Click the Advanced Search link.
      The Opportunity Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search.
3. Click the opportunity link to select it.
   The Opportunity Detail page opens.
4. Click the Attachments link.
5. Click Add.
   The Add Attachment page opens.
6. Enter a description, and click **Text**, **File**, or **URL**.
7. Enter Text, click Browse to search for the document, or enter the URL.
8. Click Create.

Return to Attachments (Opportunity) Main
Viewing an Existing Attachment (Opportunity)

**Navigation**
Opportunity > Opportunity > Attachments

**Prerequisites**
An attachment must exist.

**Steps**
To view an existing attachment, search for the opportunity for which you want to view the attachment. Click the attachment link.

Return to Attachments (Opportunity) Main

Managing Addresses

You can manage the addresses for opportunities, organizations, and people by following the steps below.

- Creating a New Address
- Editing Address Details
- Viewing Address History

Creating a New Address

**Navigation**
Opportunity, Organization, or Person

**Prerequisites**
None

**Steps**
Follow these steps to create a new address:
1. Search for the opportunity, organization, or person for which you want to create a new address.
2. Click the opportunity, organization, or person’s link to view details.
3. Click the Create Address button in the Addresses section.
4. Enter the information required.
5. Click OK.

Return to Managing Addresses Main

**Editing Address Details**

**Navigation**
Opportunity, Organization, or Person

**Prerequisites**
An address must exist.

**Steps**
Follow these steps to edit address details:
1. Search for the opportunity, organization, or person for which you want to edit address details.
2. Click the opportunity, organization, or person’s link.
3. Click the address link to display address details.
4. Edit and update information.
5. Click Update to save changes.

Return to Managing Addresses Main

**Viewing Address History**

**Navigation**
Opportunity, Organization, or Person > History

**Prerequisites**
An address must exist.
Steps
Follow these steps to view address history:

1. Search for the opportunity, organization, or person for which you want to edit address details.
2. Click the opportunity, organization, or person’s link.
3. Click the History button in the Addresses section.
4. Click Back to return to the previous page.

Opportunity Reports
You can view any of the following Opportunity Reports from the Organization tab, under the Reports subtab.

- Viewing Opportunity Summary Report
- Viewing Opportunity Summary Report by Group
- Viewing Opportunity Detail Report
- Viewing Opportunity Exchange Report
- Viewing Opportunity Access Report
- Viewing Opportunity Progression Dashboard

To download any of the opportunity reports into a comma separated values file, click the Download button. For all reports, settings in the software that you download the report to, affect how the report data is displayed. For example, if you are using Excel, if you format the cells to display up to two decimal points the data from Oracle Sales Online’s reports will be rounded to fit the software parameters.

Viewing Opportunity Summary Report
This report provides a detailed list of opportunities with amounts for each product category.

Navigation
Opportunity > Reports
Prerequisites
None

Steps
Follow these steps to view the Opportunity Summary report:

1. Click the **Opportunity Summary Report** link.
2. Select the filter options.
3. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.
   To move all available columns into the display columns section click the >> button.
4. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio buttons to indicate your preference.
5. To run the report without saving it, click **Run**.
6. To save the report without running it, click **Save**.
7. To run and save the report, click **Save and Run Report**.

**Return to Opportunity Reports Main**

**Viewing Opportunity Summary Report by Group**
This report provides a summary of all opportunities by the sales group.

**Navigation**
*Opportunity > Reports*

**Prerequisites**
None

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

1. Click the **Opportunity Summary Report by Group** link.
2. Select the filter options to fit your needs.
3. Select the display options.

4. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio buttons to indicate your preference.

5. To run the report without saving it, click Run.

6. To save the report without running it, click Save.

7. To run and save the report, click Save and Run Report.

   To download the report, click the Download button.

Return to Opportunity Reports Main

Viewing Opportunity Detail Report

This report provides a detailed listing of the selected opportunities.

Navigation
Opportunity > Reports

Prerequisites
None

Steps
Follow these steps to view the Opportunity Detail report:

1. Click the Opportunity Detail Report link.

2. Select the filter options.

3. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

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

4. In the "Save Report As" section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio buttons to indicate your preference.

5. To run the report without saving it, click Run.

6. To save the report without running it, click Save.
7. To run and save the report, click **Save and Run Report**.

Return to Opportunity Reports Main

**Viewing Opportunity Exchange Report**

The opportunity exchange report provides a list of errors generated in the process of exchanging opportunities with partners.

**Navigation**

Opportunity > Reports

**Prerequisites**

None

**Steps**

Follow these steps to view the Opportunity Exchange report:

1. Click the **Opportunity Exchange Report** link.
2. Enter the Opportunity Name.
3. Enter the Customer Name.
4. Select the Exchanged with Partner from the list of values.
5. Select the Exchanged Date Range From and To by clicking the calendar icon and choosing a date.
6. Select the Exchange Direction from the list of values.
7. Click **Go**.

Return to Opportunity Reports Main

**Viewing Opportunity Access Report**

This report provides a list of opportunities based on a manager and his or her subordinates. Please note, although the access report can be run by any sales team member, it will display only sales team members who have sales credits. Additionally, the report contains partner information for the opportunity.
Viewing Opportunity Progression Dashboard

This report provides a list of tasks for each opportunity by sales methodology.

Navigation
Opportunity > Reports

Prerequisites
None

Follow these steps to view the Opportunity Access report:

1. Click the **Opportunity Access Report** link.
2. Select the filter options.
3. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.
   
   To move all available columns into the display columns section click the >> button.
4. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio buttons to indicate your preference.
5. To run the report without saving it, click **Run**.
6. To save the report without running it, click **Save**.
7. To run and save the report at the same time, click **Save and Run Report**.
8. Select "Use as Report Default" check box to use the report as a default.

Return to Opportunity Reports Main
Steps
Follow these steps to view the Opportunity Progression report:

1. Click the **Opportunity Progression Report** link.
   The Opportunity Progression Dashboard opens.

2. Select filters.

3. Select display options.

4. In the Save Report As section, you can save the report under a different report name. Additionally, select the "Always run with current period" or "Always run with indicated period" radio buttons to indicate your preference.

5. To run the report without saving it, click **Run**.

6. To save the report without running it, click **Save**.

7. To run and save the report at the same time, click **Save and Run Report**.

8. Select "Use as Report Default" check box to use the report as a default.

Please note, opportunities will not appear on this report if the opportunities do not have tasks that were created by the sales methodology workflow associated with the opportunity OR if the user does not have any sales credit for that opportunity.

Return to Opportunity Reports Main

Viewing My Reports and Charts

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

You can view the following charts:

- Viewing Opportunity Chart by Close Date
- Viewing Opportunity Chart by Status
- Viewing Opportunity Chart by Win Probability

Return to Opportunity Reports Main
Viewing Opportunity Chart by Close Date

**Navigation**
Opportunity > Reports

**Prerequisites**
None

**Steps**
To view opportunity chart by close date, follow these steps:

1. In the Charts section, select the Opportunity Chart by Close Date from the drop down list.
2. Select the chart style from the drop down list.
3. Select the chart dimension from the drop down list.
4. Select the period type from the drop down list.
5. Select the start and end periods from the drop down lists.
6. Select the chart number from the drop down list.
7. Click Run to see the chart.

Return to Opportunity Reports Main

Viewing Opportunity Chart by Status

**Navigation**
Opportunity > Reports

**Prerequisites**
None

**Steps**
To view opportunity chart by status, follow these steps:

1. In the Charts section, select the Opportunity Chart by Status from the drop down list.
2. Select the chart style from the drop down list.
3. Select the chart dimension from the drop down list.
4. Select the period type from the drop down list.
5. Select the start and end periods from the drop down lists.
6. Select the chart number from the drop down list.
7. Click Run to see the chart.

Return to Opportunity Reports Main

Viewing Opportunity Chart by Win Probability

**Navigation**
Opportunity > Reports

**Prerequisites**
None

**Steps**
To view opportunity chart by win probability, follow these steps:

1. In the Charts section, select the Opportunity Chart by Win Probability from the drop down list.
2. Select the chart style from the drop down list.
3. Select the chart dimension from the drop down list.
4. Select the period type from the drop down list.
5. Select the start and end periods from the drop down lists.
6. Select the chart number from the drop down list.
7. Click Run to see the chart.

Return to Opportunity Reports Main
Quotes Tab

The Quotes tab contains a Quotes and a Reports subtab. From the Quotes subtab, you can do the following:

- Create a quote
- Maintain quote details
- Check availability
- Search for quotes
- Configure quote line items
- Select pricing agreements
- Apply manual price overrides
- Print a quote
- Place an order
- Contract management

For detailed instructions on how to work with quotes, please refer to the Oracle HTML Quoting Concepts and Procedures guide.

Searching for a Quote

Follow these steps to search for a quote:

**Navigation**
Quotes

**Prerequisites**
A quote must exist.

**Steps**
1. To search using **Quick Find**:
   1. Choose Quote from the drop down list.
2. Enter the full or partial name of the quote. If you enter a partial name, use the % key as a wild card.

3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Quote Search page opens.
   2. Enter search filters and display options.
   3. Enter Search Name, if you want to save the search.
   4. Click Search.

3. Click the quote link to select it.
   The Quote Detail page opens.

Return to Quotes Tab

Forecast Tab

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

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

Roles play an important part in Forecasting functions. For instance, in viewing forecasts, a manager can view the forecasts for their subordinates but a sales representative cannot view any other forecasts besides their own. If you are logged in with an Administrator role, Administrators do not have subordinates and therefore will not be able to view subordinate forecasts.

The following tasks can be performed from the Forecast subtabs:

- Creating and Submitting Forecasts
- Automatically Submitting Worksheets
- Viewing Forecast History
- Adding an Attachment (Forecast)
Forecasting is performed at two levels: product category and opportunity. The following table describes how the forecasting levels work.

<table>
<thead>
<tr>
<th>Level</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Category</td>
<td>Forecasting at the Product Category level provides salespeople with an easy way to forecast their sales at the product level by rolling up opportunity lines into product groupings. From the summary page, Pipeline value links take you to the Forecast Summary by Product Category report.</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Forecasting at the Opportunity level provides a tool for salespeople to create their own view and commitment of the opportunities that they or their sales representatives are working on. At this level, a manager can review, adjust, and commit to the numbers used in forecasting at the opportunity level.</td>
</tr>
</tbody>
</table>

Based on the role of the user, there are two viewing options; Salesperson View and Manager View. The following table describes how the Salesperson and Manager views work.

<table>
<thead>
<tr>
<th>View</th>
<th>How it works</th>
</tr>
</thead>
</table>

Forecast Tab

- Adding a Note (Forecast)
- Linking to Compensation
- Opportunity Worksheet
- Creating Opportunity Level Forecasts Using Opportunity Worksheets
- Product Category Worksheet
- Creating Product Level Forecasts Using Product Category Worksheets
- Viewing Product Category History
- Viewing Opportunity History
- Generate Forecast
- Forecast Reports
Salesperson View (you are a salesperson; you do not manage other sales people)

Weighted Pipeline=Opportunity Amount multiplied by the Win Probability

Pipeline=Total Forecastable Opportunity Amounts

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

Click the pipeline amount link to verify the opportunities included in your pipeline. This will show you a list of all forecastable opportunities with a close date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities.

If you have submitted previous forecasts, the last submitted values will appear in the forecast values.

The forecast main page will show your saved opportunity and product category worksheets (if any exist) as links. See the section on Creating Product Level Forecasts Using Product Category Worksheets and Creating Opportunity Level Forecasts Using Opportunity Worksheets for more information.

Grand totals of last saved worksheet values appear along side the links.

You can accept default values or update values the amounts you want to commit to, but you must submit your forecasts in order for your manager to be able to view them.
Manager View
(you manage one or more groups; and the forecast you submit represents the group forecast)

Weighted Pipeline = Opportunity Amount multiplied by the Win Probability

Pipeline = Total Forecastable Opportunity Amounts

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

The Manager View is located below the Salesperson View in the Forecast Summary page. Your subordinates (groups or individuals) forecasts are in the Subordinates section. You can view group details by clicking the group link; additionally, if you continue to drill down you will eventually reach the bottom of the sales hierarchy. You can view subordinate’s forecast details by clicking the subordinate’s name link.

Forecasting is divided into several sections:

- **Current Pipeline Values**: if set to yes in your Forecasting profile preferences, will show you the dynamic amounts available in the subordinates current pipeline.

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

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

- **Submitted Date, Attachments, and from the subordinates** are displayed, if available.

When you forecast for the first time you will see current pipeline values. Pipeline values will reflect only opportunities that are forecastable and are set up by the system administrator. Additionally, the default forecast values are based on your Forecasting profile set up, under the Default New Rows in Worksheet where the options are zero and pipeline.

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

If you have submitted previous forecasts, the last submitted values will appear in the forecast values.

Grand totals of last saved worksheet values appear along side the links.

**Note**: Forecasting numbers are rounded down to the nearest whole dollar.
Creating and Submitting Forecasts

Navigation
Forecast > Forecast

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

Steps
Follow these steps to create and submit Forecasts:

1. Select the Sales Group for which you want to forecast, from the drop down list. If you work in multiple groups, you must submit multiple forecasts; one per group.
2. Select the Period Type and Period Name from the drop down lists.
3. Choose the Forecast Category from the drop down list.
   The Forecast Category is a grouping of product categories for which you want to forecast.
4. Click Apply.
   Note: Your forecast currency is displayed. To change the forecast currency, go to the Profiles icon, select the Forecasting link.
5. Update Worst Case, Forecast, and Best Case with the amounts that you want to submit to management and click the Submit Forecast and Worksheets button.

Return to Forecast Tab

Automatically Submitting Worksheets

Sales Managers and Sales Representatives can automatically submit worksheets by setting the profile option "Auto Submit Forecast Worksheets" to None, Opportunity, Product Category, or Both. In accordance with your profile preferences for "Auto Submit Worksheets" you will submit worksheets according to preferences outlined
in the table below. The profile setting "Default Worksheet Values to" is used to
default data into the worksheets. A message, located on the main Forecast page,
reflects your current profile settings.

**Navigation**
**Profiles > Sales Online Preferences > Forecasting**

**Prerequisites**
You must set profile preferences.

**Steps**
Follow these steps to set up automatic submission of worksheets:

1. From the Autosubmit Worksheet drop down list, select your preferences.
2. Click **Update**.

The following table describes the Auto Submit Profiles.

<table>
<thead>
<tr>
<th>Auto Submit Worksheets Profile</th>
<th>Default Worksheet Values Profile</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>N/A</td>
<td>The main forecast is submitted. Any previously saved worksheets are submitted with the main forecast.</td>
</tr>
<tr>
<td>Opportunity</td>
<td>0</td>
<td>The main forecast is submitted. The opportunity worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Pipeline</td>
<td>The main forecast is submitted. The opportunity worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.</td>
</tr>
<tr>
<td>Product Category</td>
<td>0</td>
<td>The main forecast is submitted. The product category worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.</td>
</tr>
<tr>
<td>Product Category</td>
<td>Pipeline</td>
<td>The main forecast is submitted. The product category worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.</td>
</tr>
</tbody>
</table>
Adding an Attachment (Forecast)

Using Oracle Sales Online

Viewing Forecast History

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

Navigation
Forecast > Forecast History

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

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

Adding an Attachment (Forecast)

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

<table>
<thead>
<tr>
<th>Auto Submit Worksheets Profile</th>
<th>Default Worksheet Values Profile</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both</td>
<td>0</td>
<td>The main forecast is submitted. The opportunity and product category worksheets are submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.</td>
</tr>
<tr>
<td>Both</td>
<td>Pipeline</td>
<td>The main forecast is submitted. The opportunity and product category worksheets are submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.</td>
</tr>
</tbody>
</table>
Adding a Note (Forecast)

Navigation
Forecast > Forecast > Attachments

Prerequisite
A forecast must already exist.

Steps
You can add an attachment to an existing forecast by following these steps:
1. Select an existing forecast.
2. Click the Attachments link.
3. Click Add.
   The Add Attachment page opens.
4. Enter a description, click Text, File, or URL.
5. Enter Text, click Browse to search for the document, or enter the URL.
6. Click Create.

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

Return to Forecast Tab

Adding a Note (Forecast)

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

Navigation
Forecast > Forecast > Notes

Prerequisites
A forecast must already exist.

Steps
Follow these steps to add a note:
1. Select an existing forecast.
1. Click the Notes link.
2. Select a Type from the drop down list.
   You can change the default type by changing the Forecasting profile preferences.
3. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
4. Enter your notes in the text box.
5. Click Create

Forecast Notes are submitted to management along with forecast numbers.

Note: You cannot edit notes once they are created.

Return to Forecast Tab

Linking to Compensation

From the Forecast tab, you can view a year-to-date earnings report of your subordinates.

Navigation
Forecast > Compensation

Prerequisites
Oracle Incentive Compensation must be installed to use this feature.
Please refer to the Oracle Incentive Compensation Concepts and Procedures guide for more information.

Steps
Click the Compensation icon in the last column of Subordinates Forecast section. The Year-to-Date Earnings Summary page opens.

Return to Forecast Tab

Opportunity Worksheet

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

- Create Opportunity Level Forecast Using Opportunity Worksheet

Return to Forecast Tab

Creating Opportunity Level Forecasts Using Opportunity Worksheets

**Navigation**
Forecast > Opportunity

**Prerequisites**
None

**Steps**
Follow these steps to create opportunity worksheets:

1. From the drop down list select the Sales Group for which you want to forecast.
2. Select the Period Type and Period Name from the drop down lists.
3. Select the Forecast Category from the drop down list.
4. From the “Create Worksheet Using” radio buttons, select one of the following options:
   - **Previously Saved Values (default):** If you are forecasting for the first time, the value is based on the Sales Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.
   - **Pipeline Default Amounts:** This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

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

   Pipeline defaults use the following criteria:
   - **Worst Case:** Total Won Amount=Sum of all won opportunities
   - **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
Best Case: Total sum of all forecastable opportunities

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

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

5. Click Apply.

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

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

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

6. Click Save.

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

Product Category Worksheet

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

- Create Product Level Forecast Using Product Category Worksheet

Creating Product Level Forecasts Using Product Category Worksheets

Navigation
Forecast > Product Category

Prerequisites
None
Steps
Follow these steps to create product level forecasts using product category worksheets:

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

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

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

   Pipeline defaults use the following criteria:
   - **Worst Case:** Total Won Amount=Sum of all won opportunities
   - **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
   - **Best Case:** Total sum of all open opportunities

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

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

5. Click **Apply**.

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

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

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

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

Return to Forecast Tab

Viewing Product Category History

Navigation
Forecast > Product Category

Prerequisites
Previous product category forecasts must have been submitted.

Steps
You can view the Product Category Worksheet History by following these steps:
1. Click Product Category Worksheet.
2. Click the History button, to view the history of all previous forecast submissions for this product category.

Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted.

Return to Forecast Tab

Viewing Opportunity History

Navigation
Forecast > Opportunity

Prerequisites
Previous opportunity forecasts must have been submitted.

Steps
You can view the Opportunity Worksheet History by following these steps:
1. Click Opportunity Worksheet.
2. Click the History button, to view the history of all previous forecast submissions for this opportunity for all periods, groups, and roles, in descending submitted date.

Return to Forecast Tab

Generate Forecast

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

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

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

Navigation
Forecast > Generate Forecast

Prerequisites
Set up profile OSO: Forecast Max Generate Months. See the Oracle Sales Online Implementation Guide, Profiles appendix.

Steps
Follow these steps to generate a forecast:

1. From the Sales Group section, select a sales group from the drop down list.
2. From the Forecast section, select the Period Type from the drop down list.
3. Select the "From Period" and "To Period" from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. Click View.
   Displays the values that will be generated for your forecast.
6. Select all periods for which you want to generate forecasts by selecting the check box. The default is for all boxes to be selected.
7. Click **Submit**.

8. Click the period’s link to view the forecast.

**Return to Forecast Tab**

### Forecast Reports

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

- Viewing Forecast Summary by Product Category
- Viewing Forecast Accuracy Report
- Viewing Forecast Progression Report
- Viewing Forecast Comparison Report
- Viewing Forecast History Report
- Viewing Forecast to Pipeline Summary Report
- Viewing Forecast Summary Report
- Creating a Report (Forecast)
- Viewing Forecast History (Self) Chart
- Viewing Forecast History (Subordinates) Chart

For all reports, settings in the software that you download the report to, affect how the report data is displayed. For example, if you are using Excel, if you format the cells to display up to two decimal points the data from Oracle Sales Online’s reports will be rounded to fit the software parameters.

**Return to Forecast Tab**

### Viewing Forecast Summary by Product Category

The Forecast Summary Report by Product Category shows a detailed list of all opportunities which are included in forecasting based on the forecast date at the opportunity line instead of the close date at the opportunity header level. Please
note, the opportunity close date will appear on the report as part of the opportunity header information, not the line level forecast date.

**Navigation**
Forecast > Reports

**Prerequisites**
None

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

1. Click the **Forecast Summary Report by Product Category** link.
   The Create Forecast Summary by Product Category Report page opens.

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

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

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

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

Return to Forecast Reports Main

Viewing Forecast Accuracy Report

Navigation
Forecast > Reports

Prerequisites
Run the concurrent program, "Refresh Materialized View for Forecast Reports" in order to get the latest data.

Steps
Follow these steps to view the Forecast Accuracy report:

1. Click the Forecast Accuracy report link.
2. Select your search filters.
3. Select your display options.
4. Click Save.
   You can save the report by entering a report name and clicking the Save button.
5. Run the report by clicking Run Report.
Please note, if the Actuals section of the report does not display an amount, you must enter Actuals from the Administration > Sales > Budget/Revenue Entry link.

6. Click the Modify Parameters button to view the selected defaults.

7. To display the report on your home page, select the "Display on Homepage" check box.

   Please note, if you select the Display on Homepage check box, you must go to the Profiles > Homepage preferences and select the report to actually display the report on the home page.

8. To download the report, click Download Report.

Return to Forecast Reports Main

**Viewing Forecast Progression Report**

**Navigation**
Forecast > Reports

**Prerequisites**
None

**Steps**
Follow these steps to view the Forecast Accuracy report:

1. Click the Forecast Progression report link.
2. Select your search filters.
3. Select your display options.
4. Click Save.
   
   You can save the report by entering a report name and clicking the Save button.
5. Run the report by clicking Run Report.
   
   To display the report on your home page, select the "Display on Homepage" check box.
Please note, if you select the Display on Homepage check box, you must go to the Profiles > Homepage preferences and select the report to actually display the report on the home page.

6. Click Download Report.

Return to Forecast Reports Main

Viewing Forecast Comparison Report

This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet. Please note, only submitted forecasts are included in this report.

Navigation
Forecast > Reports

Prerequisites
None

Steps
Follow these steps to view the Forecast Comparison Report:

1. Click the Forecast Comparison Report link.
2. Select Forecast 1 filters.
3. Select Forecast 2 filters
4. Select Display Options.
5. Select Reporting Currency and Scaling.
6. Enter a Report Name.
7. Click Save.
8. If you want to display the report on your home page, select the check box.

Return to Forecast Reports Main
Viewing Forecast History Report

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

Navigation
Forecast > Reports

Prerequisites
None

Steps
Follow these steps to view the Forecast History Report:

1. Click the Forecast History Report link.
2. Select the Period Type from the drop down list.
3. Select the Sales Group from the drop down list.
4. Before selecting the "Period" from the drop down list, select "To" from the drop down list.
5. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking Go.
6. Enter a Report Name.
7. Select from the radio buttons, Always run using current period or Always run using indicated period.
8. Select the Display on Home Page button to display the report on your home page.
   Please note, if you select the Display on Homepage check box, you must go to the Profiles > Homepage preferences and select the report to actually display the report on the home page.
9. Click Run Report to run the report.
10. Click Download Report, to download the report to a spreadsheet application.
    Please note, the currency shown at the top of the Forecast History Report page may not reflect the currency you have chosen through your selection criteria.
Viewing Forecast to Pipeline Summary Report

Navigation
Forecast > Reports

Prerequisites
Run the concurrent program, "Refresh Materialized View for Forecast Reports" in order to get the latest data.

Steps
To view the Forecast to Pipeline Summary report, follow these steps.
1. Click the Forecast to Pipeline Summary report link.
   The Forecast to Pipeline Summary page opens.
2. Select filters and display options.
3. If you want to save the report, enter a report name.
4. Select "Always run using current period" or "Always run using indicated period" by selecting the radio button.
5. Select the "Display on Homepage" check box to display the report on your home page.
   Please note, if you select the Display on Homepage check box, you must go to the Profiles > Homepage preferences and select the report to actually display the report on the home page.
6. Click Run Report.
7. Click Download Report, to download the report to a spreadsheet application.

Viewing Forecast Summary Report

Follow these steps to view the Forecast Summary report:
Navigation
Forecast > Reports

Prerequisites
Run the concurrent program, "Refresh Materialized View for Forecast Reports" in order to get the latest data.

Steps
1. Click the Forecast Summary report link.
   This report provides management with the summary of the current forecast in comparison to a particular base period.
2. Select a Period Type from the drop down list.
3. Select the Period from the drop down list.
4. Select the Comparison Period from the drop down list.
5. Select the Sales Group from the drop down list.
6. Enter the Salesperson’s name, click Go.
7. Select Reporting Currency from the drop down list in the Display Options section.
8. Select the Scaling from the drop down list.
9. You have several options to choose from in the Save Report section.
   a. To Save and Run the report, click the Save and Run Report button.
   b. To always run using current period, select the radio button.
   c. To always run using indicated period, select the radio button.
   d. To display on your home page, select the Display on Homepage checkbox.
   Please note, if you select the Display on Homepage check box, you must go to the Profiles > Homepage preferences and select the report to actually display the report on the home page.
10. Click Run Report.
11. To modify report parameters, click the Modify Parameters button.
12. Click the Download Report icon to download the report to a comma separated value file.
Creating a Report (Forecast)

**Navigation**
Forecast > Reports

**Prerequisites**
None

**Steps**
Follow these steps to create a forecast report:
1. Click **Personalize**.
2. Select search filters.
3. Select display options.
4. Select sort options.
5. Enter a report name.
6. Save and run the report.

Viewing Forecast History (Self) Chart

**Navigation**
Forecast > Reports

**Prerequisites**
A forecast history must exist.

**Steps**
To view forecast history (self) charts, follow these steps:
1. In the Charts section, select Forecast History (self) from the drop down list.
2. Select the chart style from the drop down list.
3. Select the chart dimension from the drop down list.
4. Select the period type from the drop down list.
5. Select the start and end periods from the drop down lists.
6. Select the chart number from the drop down list.
7. Click Run.

Return to Forecast Reports Main

Viewing Forecast History (Subordinates) Chart

**Navigation**
Forecast > Reports

**Prerequisites**
A subordinates forecast history must exist.

**Steps**
To view forecast history (subordinates) charts, follow these steps:

1. In the Charts section, select Forecast History (subordinates) from the drop down list.
2. Select the chart style from the drop down list.
3. Select the chart dimension from the drop down list.
4. Select the period type from the drop down list.
5. Select the start and end periods from the drop down lists.
6. Select the chart number from the drop down list.
7. Click Run.

Return to Forecast Reports Main
Customer Tab

The Customer tab is comprised of four subtabs, Organization, Contact, Person, and Reports.

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

- Personalizing Organization Summary
- Creating a New Organization
- Maintaining Organization Details
- Searching for an Organization
- Creating and Maintaining Relationships (Organization)
- Sales Teams (Organization)
- Maintaining Lead Details (Organization)
- Creating and Maintaining Opportunities (Organization)
- Maintaining Quote Details
- Interactions (Organization)
- Accounts
- 360 Degree View (Organization)
- Notes (Organization)
- Tasks (Organization)
- Attachments (Organization)

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

- Personalizing Person Summary
- Updating Person Summary Table
- Creating a Person
- Maintaining Person Details
- Searching for a Person
- Sending Collateral (Person)
- Creating and Maintaining Relationships (Person)
- Sales Teams (Person)
Organization Subtab

- Leads (Person)
- Creating Opportunities (Person)
- Maintaining Quote Details
- Interactions (Person)
- Accounts (Person or Organization)
- 360 Degree View (Person)
- Notes (Person)
- Tasks (Person)
- Attachments (Person)

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

- Personalize Contact Summary
- Creating a Contact
- Searching for a Contact
- Maintaining Contact Details
- Managing Relationship Notes
- Creating a Relationship Task
- Managing Relationship Attachments
- Managing Relationship Interactions
- Sending Collateral from the Contact Summary Table

By default, the Customer tab opens to the Organization Summary page. Use the Customer tab to create and maintain Organizations, People, and Contacts by clicking the related subtab.

Return to Oracle Sales Online Main Menu

Organization Subtab

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

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

- Personalizing Organization Summary
- Creating a New Organization
- Maintaining Organization Details
- Searching for an Organization
- Creating and Maintaining Relationships (Organization)
- Sales Teams (Organization)
- Maintaining Lead Details (Organization)
- Creating and Maintaining Opportunities (Organization)
- Maintaining Quote Details
- Interactions (Organization)
- Accounts
- 360 Degree View (Organization)
- Notes (Organization)
- Tasks (Organization)
- Attachments (Organization)

Return to Customer Tab Main

**Personalizing Organization Summary**

**Navigation**
Customer > Organization

**Prerequisites**
None

**Steps**
Follow these steps to personalize the organization summary page:
Creating a New Organization

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

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

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

Return to Customer Tab Main

Creating a New Organization

**Navigation**

Customer > Organization

**Prerequisites**

None

**Steps**

Follow these steps to create a new organization:

1. Click **Create**.
2. Enter the required information and optional information. See the table below for detailed descriptions of each field.

The following table describes the Create Organization fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Yes</td>
<td>The organization name is a required field.</td>
</tr>
</tbody>
</table>
Creating a New Organization

Using Oracle Sales Online

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Type</td>
<td>No</td>
<td>Select an address type from the list of values.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name Pronunciation</td>
<td>No</td>
<td>You can enter the organization name pronunciation.</td>
</tr>
<tr>
<td>Tax ID</td>
<td>No</td>
<td>Enter the tax identification code.</td>
</tr>
<tr>
<td>Email Addressbook</td>
<td>No</td>
<td>Enter the email address here or click the email address book to select another address.</td>
</tr>
<tr>
<td>Customer Category</td>
<td>No</td>
<td>Select customer category from the drop down list.</td>
</tr>
<tr>
<td>Annual Revenue</td>
<td>No</td>
<td>Select the currency from the drop down list. Enter the annual company revenue into the next field.</td>
</tr>
<tr>
<td>Fiscal Year End</td>
<td>No</td>
<td>Select the fiscal year end from the drop down list.</td>
</tr>
<tr>
<td>Web Site Address Book</td>
<td>No</td>
<td>Enter the organization’s web site or click the web address book icon to select another party web address to display.</td>
</tr>
<tr>
<td>External/Internal</td>
<td>No</td>
<td>By default External is selected. Use Internal only if you are creating your organization. If you want to create relationships between your organization and other external organizations</td>
</tr>
<tr>
<td>Alias</td>
<td>No</td>
<td>Enter an organization alias.</td>
</tr>
<tr>
<td>Phonebook</td>
<td>No</td>
<td>Click the phonebook link to select another party phone number to display.</td>
</tr>
<tr>
<td>Business Line</td>
<td>No</td>
<td>Enter a business line, if applicable.</td>
</tr>
<tr>
<td>Total Employees</td>
<td>No</td>
<td>Enter the total number of employees.</td>
</tr>
<tr>
<td>Year Established</td>
<td>No</td>
<td>Enter the year the organization was established.</td>
</tr>
</tbody>
</table>
If you want to enter person relationships, you can add an existing person by entering the last name in the Add a Person field and clicking Go. You can create a relationship with a person, who does not exist in the database yet, by entering the required information directly into the fields. When you click Update, the person is created in the database.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1</td>
<td>Yes</td>
<td>Enter the organization address.</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>No</td>
<td>Enter additional organization address information.</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>No</td>
<td>Enter additional organization address information.</td>
</tr>
<tr>
<td>Address Line 4</td>
<td>No</td>
<td>Enter additional organization address information.</td>
</tr>
<tr>
<td>County</td>
<td>No</td>
<td>Enter in the county field.</td>
</tr>
<tr>
<td>Start Date</td>
<td>No</td>
<td>Select a start date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>No</td>
<td>Select the do not mail check box so that mail will not be sent to the address.</td>
</tr>
<tr>
<td>City</td>
<td>No</td>
<td>Enter in the city field.</td>
</tr>
<tr>
<td>State</td>
<td>No</td>
<td>Select from the drop down list.</td>
</tr>
<tr>
<td>Province</td>
<td>No</td>
<td>Select from the drop down list.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>No</td>
<td>Enter in the postal code field.</td>
</tr>
<tr>
<td>Country</td>
<td>Yes</td>
<td>Select country from the drop down list.</td>
</tr>
<tr>
<td>End Date</td>
<td>No</td>
<td>Select an end date by clicking the calendar icon and choosing a date.</td>
</tr>
</tbody>
</table>

If you are going to add a person relationship, enter the full or partial name and click the Go button.
The following table describes Organization Relationship fields in Create Organization.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an Organization</td>
<td>Yes</td>
<td>If you are going to add an organization relationship, enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Erase</td>
<td>No</td>
<td>To erase a relationship from the summary table, click the erase icon.</td>
</tr>
<tr>
<td>Relationship</td>
<td>Yes</td>
<td>Select a relationship from the drop down list.</td>
</tr>
<tr>
<td>Related Organization</td>
<td>Yes</td>
<td>This field holds the name of the related organization.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Yes</td>
<td>Select a start date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>End Date</td>
<td>No</td>
<td>Select an end date by clicking the calendar icon and choosing a date.</td>
</tr>
</tbody>
</table>

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

- Link to Maintaining Organization Details

Maintaining Organization Details

Navigation
Customer > Organization

Prerequisites
An organization must exist.

Steps
Follow these steps to edit an existing organization:

Select Quick Find or Advanced Search.

1. To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search, enter a Search Name.
   4. Click Search. If you want to apply the search and save the search at the same time, choose the Save and Apply Search button.

3. To select an organization, click the organization’s link.
   The Organization Detail Main page opens.

4. Add or update information.
The following table describes the Organization Detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Yes</td>
<td>The organization name is a required field.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>No</td>
<td>You can enter the organization name pronunciation.</td>
</tr>
<tr>
<td>Pronunciation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DUNS Number</td>
<td>No</td>
<td>Dunn and Bradstreet Number is pre-populated.</td>
</tr>
<tr>
<td>Tax Code/ID</td>
<td>No</td>
<td>Enter the tax code.</td>
</tr>
<tr>
<td>Email Addressbook</td>
<td>No</td>
<td>Enter the email address here or click the email address book to select another address.</td>
</tr>
<tr>
<td>Customer Category</td>
<td>No</td>
<td>Select customer category from the drop down list.</td>
</tr>
<tr>
<td>Annual Revenue</td>
<td>No</td>
<td>Select the currency from the drop down list. Enter the annual company revenue into the next field.</td>
</tr>
<tr>
<td>Fiscal Year End</td>
<td>No</td>
<td>Select the fiscal year end from the drop down list.</td>
</tr>
<tr>
<td>Last Order Date</td>
<td>No</td>
<td>View the last order date.</td>
</tr>
<tr>
<td>Web Site Address Book</td>
<td>No</td>
<td>Click the link to view the organization’s web site. Click the icon to add or edit web site addresses.</td>
</tr>
<tr>
<td>External/Internal</td>
<td>No</td>
<td>By default External is selected. Use Internal only if you are creating your organization. If you want to create relationships between your organization and other external organizations</td>
</tr>
<tr>
<td>Number</td>
<td>No</td>
<td>View the number assigned to the organization.</td>
</tr>
<tr>
<td>Alias</td>
<td>No</td>
<td>Enter an organization alias.</td>
</tr>
<tr>
<td>SIC Code</td>
<td>No</td>
<td>Select an SIC code by entering a partial code and clicking Go. Select from the search results which are a subset of the SIC code version.</td>
</tr>
<tr>
<td>External System Number</td>
<td>No</td>
<td>Click the External System Number link to view details.</td>
</tr>
</tbody>
</table>
5. In the Addresses section you can edit information such as:
   - Identifying Address: Main address used to identify the organization
   - Address History: Address history of the organization
   - Map It: Map the address by clicking the icon
   - Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
   - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
   - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
   - Status: Displays the status indicated in the details
   - Type: Displays the address type indicated in the details
   - Primary: Used to indicate primary address type across physical addresses

To select an existing address, enter a full or partial address in the Select an Existing Address field and click **Go**.

**Create an Address**

Follow these steps:

1. Click **Create Address**.
2. Select the country from the drop down list; this is a required field. The page will display fields according to the country that you have chosen.
3. Enter the appropriate address lines as they appear. This includes city, state, province, postal code, etc.
4. Select an end date by clicking the calendar icon.
5. Select a status from the drop down list.
6. Select a start date by clicking the calendar icon, if you do not enter a date, the default is the current date.
7. In the Address Types section, select Address Type from the drop down list.
8. Select the Primary check box to select the primary by type. For example, if the type is "Bill to" and it is marked as primary, it will be the primary "Bill to" address across all addresses that exist for this organization.
9. Select a Status from the drop down list.
10. Click Create. The Organization Detail page opens.
11. Click Update. Return to Customer Tab Main

Searching for an Organization

Navigation
Customer > Organization

Prerequisites
An organization must exist.

Steps
Follow these steps to search for an organization:
Select Quick Find or Advanced Search.
1. To search using Quick Find:
   1. Choose Organization from the drop down list.
2. Enter the partial name of the organization for which you are searching.
3. Click **Go**.

2. To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search, enter a Search Name.
   4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

   Please note, when searching for a customer (organization or person) the Active Flag indicates customer status and the Address Active Flag indicates address status.

Return to Customer Tab Main

### Creating and Maintaining Relationships (Organization)

Organizations can have two types of relationships; Organization to Organization and Organization to Person. Use Organization to Organization relationships to create parent and subsidiary, headquarters and division, partner and competitor, relationships. Use Organization to Person relationships to create business contact relationships.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of subject and object existing addresses. If you change one of these addresses, you must complete this action by going to the subject or object record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

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

- Creating an Organization to Organization Relationship
- Creating an Organization to Person Relationship

Return to Customer Tab Main
Creating an Organization to Organization Relationship

Navigation
Customer > Organization > Relationships

Prerequisites
Both organizations should exist in the system. Please note, in comparison to creating a organization to person relationship, creating an organization to organization relationship does not allow you to create a relationship directly into the relationship summary table.

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

1. From the Customer tab, you can select an organization by clicking the organization link from the summary table, using Quick Find or Advanced Search.
   
   To search using Quick Find:
   
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.

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

2. Click the organization link to select it.

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

3. Click the Relationships link.

4. In the Add an Organization field, enter the name, or partial name.

5. Click Go.
Creating an Organization to Person Relationship

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

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

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

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

8. Optionally, enter a start and/or end date. If a start date is not entered, the field will default to the current date when you click Update.

9. Click Update.

10. After saving the relationship, the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. Additionally, the Related Organization will become a link and you can view the related organization’s detail by clicking to select it.

11. From the Organization to Organization Relationship Detail page you can change the relationship type, start and end dates, select relationship addresses and designate an identifying related address, add Notes, Tasks, Interactions, and Attachments.

Return to Customer Tab Main

Creating an Organization to Person Relationship

Navigation
Customer > Organization > Relationships

Prerequisites
The Organization should exist.

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

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

   To search using Quick Find:
1. Choose Organization from the drop down list.

2. Enter the partial name of the organization for which you are searching using % as a wildcard.

3. Click Go.

To search using Advanced Search:

1. Click the Advanced Search link.
   The Organization Search page opens.

2. Select search filters and display options.

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

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

2. Click the organization link to select it.

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

3. Click the Relationships link.

4. In the Add a Person field, enter the name, or partial name.

5. Click Go.

6. Choose from the list of people or, if you do not find the person for which you are looking, Create a Customer.

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

8. Optionally, you can enter phone number, email address, job titles, or send collateral.

9. Click Update.

10. After saving the relationship the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. From the Relationship Detail page you can change the relationship type, start and end dates, addresses, and add other details such as mail stop, roles, manager information, and job title. Additionally, you can add Notes, Tasks, Interactions, and Attachments to the relationship detail.

Return to Customer Tab Main
Creating a Customer

When you are creating a relationship, you may need to create a new customer.

Navigation
Customer > Organization > Relationships

Steps
Follow these steps to create a new customer:
1. From the Relationships detail page, click Create Customer.
2. Enter the required information.
3. Click Create.

Continue creating a relationship after you have created the new customer.

Return to Customer Tab Main

Sales Teams (Organization)

Sales teams represent all of the salespeople and partners that have ownership of a specific customer or opportunity. Sales team members can have full access or non-full access (view only) ownership. When a salesperson creates an organization, he/she is automatically added to the sales team for that organization.

- Adding a Sales Team Member (Organization)
- Adding a Partner to a Sales Team (Organization)
- Adding a Resource Team to a Sales Team (Organization)
- Removing a Sales Team Member (Organization)

Return to Customer Tab Main

Adding a Sales Team Member (Organization)

Navigation
Customer > Organization > Sales Team
Prerequisites
None

Steps
Follow these steps to add a sales team member:

1. From the Customer tab, search for an organization:
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the full or partial name of the organization for which you are searching. If you enter a partial name, use % as a wildcard.
   3. Click Go.

   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

2. Click the organization link to select it.
   The Organization Detail Main page opens.

3. Click the Sales Team link.

4. Enter the last name or partial name of the sales representative in the "Add a Salesperson" field, and click Go.

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

6. Click the salesperson link. The salesperson will be added to the Sales Team summary table.

7. Enter territory properties, and click Go.

8. Select a Role from the drop down list.

9. You can view the email address and phone number for this salesperson.
10. Click Update.

Return to Customer Tab Main

Adding a Partner to a Sales Team (Organization)

Navigation
Customer > Organization > Sales Team

Prerequisites
None

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

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

2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the organization link to select it.
   The Organization Detail Main page opens.

4. Click the Sales Team link.

5. Enter the partner name in the "Add a Partner" field, click Go.
6. Select a partner from the search results page by clicking the link.

7. Click Update.

You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner. Refer to the Oracle Partners Online Concepts and Procedures guide for more detailed information.

Return to Customer Tab Main

Adding a Resource Team to a Sales Team (Organization)

Navigation
Customer > Organization > Sales Team

Prerequisites
None

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

1. From the Customer tab, search for an organization:
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the full or partial name of the organization. If you enter a partial name, use the % key as a wildcard.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
   The Organization Search page opens.
   2. Enter search filters and display options.
   3. Optionally enter a Search Name, if you want to save the search.
   4. Click Search.

2. Click the organization link to select it.
   The Organization Detail page opens.
Removing a Sales Team Member (Organization)

Steps
Follow these steps to remove a sales team member:

1. From the Customer tab, choose an organization.
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the Sales Team link.
4. In the Add a Resource field, enter the resource name using the % as a wildcard, and click Go.
5. Select a resource from the search results page by clicking the link.
6. Click Update.
7. Members of resource team will be added to the sales team.

Return to Customer Tab Main
2. Click the organization link to select it. The Organization Detail Main page opens.

3. Click the **Sales Team** link.

4. Locate the salesperson that you want to remove on the summary table. Please note, you cannot remove the salesperson if they are the only sales team member assigned to the customer.

5. Select the Remove check box.

6. Click **Update**.

**Return to Customer Tab Main**

---

### Maintaining Lead Details (Organization)

#### Navigation

**Customer > Organization > Leads**

#### Steps

Follow these steps to maintain lead details from the Organization subtab:

1. Search for an organization from which you want to edit lead details.

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

   To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Click the organization link to select it.
The Organization Detail Main page opens.

3. Click the **Leads** link.

   The Leads summary page opens.

4. Select a lead by clicking the lead link

   The Lead Detail page opens.

   The following table describes the fields you can edit in the Lead Detail page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>No</td>
<td>Enter the lead name.</td>
</tr>
<tr>
<td>Customer</td>
<td>No</td>
<td>View the customer number by clicking the link.</td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Enter the location address.</td>
</tr>
<tr>
<td>Project Name</td>
<td>No</td>
<td>Enter the full or partial name of the project and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Assign To</td>
<td>Yes</td>
<td>Enter the full or partial name of the person you want to assign the lead to and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Status</td>
<td>Yes</td>
<td>Select a status from the drop down list.</td>
</tr>
<tr>
<td>Channel</td>
<td>No</td>
<td>Select a channel from the drop down list.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>No</td>
<td>Select a time frame from the drop down list.</td>
</tr>
<tr>
<td>Campaign</td>
<td>Yes</td>
<td>Enter the full or partial name of the campaign and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Budget</td>
<td>No</td>
<td>Enter the total budget and select a currency from the drop down list.</td>
</tr>
<tr>
<td>Decline Reason</td>
<td>No</td>
<td>Enter a decline reason, if applicable.</td>
</tr>
<tr>
<td>Close Reason</td>
<td>No</td>
<td>Enter a close reason, if applicable.</td>
</tr>
<tr>
<td>Lead Number</td>
<td>No</td>
<td>View the lead number.</td>
</tr>
<tr>
<td>Urgent</td>
<td>No</td>
<td>Select the Urgent check box if this is an urgent lead.</td>
</tr>
<tr>
<td>Qualified</td>
<td>No</td>
<td>Select the Qualified check box if the lead is qualified.</td>
</tr>
<tr>
<td>Accepted</td>
<td>No</td>
<td>Select the Accepted check box if the lead is accepted.</td>
</tr>
</tbody>
</table>
Creating and Maintaining Opportunities (Organization)

In the Purchase Items section, you can maintain the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned Date</td>
<td>No</td>
<td>Select an assigned date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>No</td>
<td>Select a lead rank from the drop down list.</td>
</tr>
<tr>
<td>Vehicle Response Code</td>
<td>No</td>
<td>Select a vehicle response code from the drop down list.</td>
</tr>
<tr>
<td>Budget Status</td>
<td>No</td>
<td>Select a budget status from the drop down list.</td>
</tr>
</tbody>
</table>

In the Purchase Items section, you can maintain the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>No</td>
<td>Select the remove check box to remove the purchase item.</td>
</tr>
<tr>
<td>Product Category</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Item ID</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>No</td>
<td>View the unit of measure.</td>
</tr>
<tr>
<td>Quantity</td>
<td>No</td>
<td>Enter the quantity.</td>
</tr>
<tr>
<td>Budget Amount</td>
<td>No</td>
<td>Enter the budget amount.</td>
</tr>
<tr>
<td>Campaign</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
</tbody>
</table>

5. Click Update.

Return to Customer Tab Main

Creating and Maintaining Opportunities (Organization)

You can create and maintain opportunities, in the context of a specific organization, by using the following steps.
Creating and Maintaining Opportunities (Organization)

Navigation
Customer > Organization > Opportunities

Prerequisites
The organization must exist.

Steps
Follow these steps to create a new opportunity:

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

   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.

   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search, enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

2. Click the organization link to select it.
   The Organization Detail Main page opens.

3. Click the Opportunities link.
   You will see a summary of all opportunities for the specific organization.

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

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

From the Customer tab you can view and maintain quote details.

**Navigation**
Customer > Organization or Person > Quotes

**Prerequisites**
A quote must exist.

**Steps**
1. Search for the quote using Quick Find or Advanced Search.
   To search using **Quick Find**:  
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
   3. Click **Go**.
   To search using **Advanced Search**:  
   1. Click the **Advanced Search** link.

5. Click **Create** to create a new opportunity.
   The organization name will default to the name of the organization that you have created or the organization for which you are viewing the details.

6. Enter the customer address and opportunity name. Additionally, enter any other information.

7. Click **Create**.
   The Opportunity Detail page opens.

8. Optionally, enter additional information on the Opportunity Detail page or click the link to return to the organization detail.
   The opportunity that you have created will appear in the opportunity summary table.

Return to Customer Tab Main
Interactions (Organization)

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

2. Click the organization or person link to select it.
The Organization or Person Detail Main page opens.

3. Click the **Quotes** link.
The Quote Detail page opens.

4. Update quote information.
5. Click **Update** to save changes.

Return to Customer Tab Main

Interactions (Organization)

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

- Viewing Interactions (Organization)

Return to Customer Tab Main

Viewing Interactions (Organization)

**Navigation**
Customer > Organization > Interactions

**Prerequisites**
The interaction must exist.

**Steps**
Follow these steps to view interactions:
1. From the Customer tab, choose an organization.
2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.
3. Click the organization link to select it.
   The Organization Detail Main page opens.
4. Click the Interactions link.
5. Select search filters.
6. Click Apply.
   Note: Oracle Sales Online users cannot create interactions.
Return to Customer Tab Main

Accounts

You can manage accounts for organizations and people from the Customer tab.
Click a link below to find step-by-step instructions to manage accounts.
- Creating Accounts (Organization or Person)
- Maintaining Account Details (Organization or Person)
- Viewing Account Sites (Organization or Person)
- Viewing Account Roles (Organization or Person)
Creating Accounts (Organization or Person)

Navigation
Customer > Organization or Person > Accounts

Prerequisites
None

Steps
Follow these steps to create an account:

1. From the Customer tab, choose an organization or person.
2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization or Person Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.
3. Click the organization or person link to select it.
   The Organization or Person Detail Main page opens.
4. Click the Accounts link.
The Account Summary page opens with all accounts that exist for the Organization or Person.

5. Click Create.

The Create Account page opens.

The following table describes the fields available on the Create Account Detail page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Name</td>
<td>No</td>
<td>Enter the account name.</td>
</tr>
<tr>
<td>Account Number</td>
<td>Yes</td>
<td>Depending on your profile set up, the account number may be automatically generated. If the field is not already filled in, enter an account number.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>Select a status from the drop down list.</td>
</tr>
<tr>
<td>Activation Date</td>
<td>No</td>
<td>Select an activation date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Subcategory Code</td>
<td>No</td>
<td>Select a subcategory code from the drop down list.</td>
</tr>
<tr>
<td>Tax Code</td>
<td>No</td>
<td>Select a tax code from the drop down list.</td>
</tr>
<tr>
<td>Deposit Refund Method</td>
<td>No</td>
<td>Enter the deposit refund method.</td>
</tr>
</tbody>
</table>

6. Click Create.

Return to Customer Tab Main

Maintaining Account Details (Organization or Person)

Navigation
Customer > Organization or Person > Accounts

Prerequisites
An account for an organization or person must exist.
Steps
Follow these steps to view an account:

1. From the Customer tab, choose an organization or person.

2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization or Person Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the organization or person link to select it.
   The Organization or Person Detail Main page opens.

4. Click the Accounts link.

5. Select an account from the summary table by clicking the account’s link.
   The Account Detail page opens.
   The following table describes the Account Detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Name</td>
<td>No</td>
<td>Enter the account name.</td>
</tr>
<tr>
<td>Account Number</td>
<td>Yes</td>
<td>View the account number.</td>
</tr>
<tr>
<td>Status</td>
<td>Yes</td>
<td>Select a status from the drop down list.</td>
</tr>
</tbody>
</table>
7. Click **Update**.

**Return to Customer Tab Main**

**Viewing Account Sites (Organization or Person)**

**Navigation**
Customer > Organization or Person > Accounts

**Prerequisites**
An account site for an organization or person must exist.

**Steps**
Follow these steps to view an account site:
1. From the Customer tab, choose an organization or person.

2. Select Quick Find or Advanced Search.

   To search using Quick Find:
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
   3. Click Go.

   To search using Advanced Search:
   1. Click the Advanced Search link.
   The Organization or Person Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the organization or person link to select it.
   The Organization or Person Detail Main page opens.

4. Click the Accounts link.

5. Select an account from the summary table by clicking the account’s link.
   The Account Detail page opens.

6. Click the Sites link.
   1. To add a site, click the Add Site button.
   2. Select an address that already exists
      ■ Change the site use by selecting from the drop down list
      ■ Select the Primary check box, if applicable
      ■ Change the site Status by selecting from the drop down list
   3. To view site details, click the site Address link.
   4. To view site history, click the History button.
   5. To map the site address, click the Map It icon.
Viewing Account Roles (Organization or Person)

Navigation
Customer > Organization or Person > Accounts

Prerequisites
An account role for an organization or person must exist.

Steps
Follow these steps to view an account role:
1. From the Customer tab, choose an organization or person.
2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization or Person Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.
3. Click the organization or person link to select it.
   The Organization or Person Detail Main page opens.
4. Click the Accounts link.
5. Select an account from the summary table by clicking the account’s link.
The Account Detail page opens.

6. Click the Roles link.
   1. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using % as a wildcard. Click Go.
   2. To remove a role, locate the related account and click the Erase icon.
   3. To change the role type, select from the drop down list.
   4. To indicate a primary role, select the Primary Role radio button.
   5. To change the status, select from the drop down list.
   6. To find an address, enter the full or partial address using % as a wildcard. Click Go.
   7. Select an effective date by clicking the calendar icon and choosing a date.
   8. Select an end date by clicking the calendar icon and choosing a date.

7. Click Update.

Return to Customer Tab Main

---

Viewing Account Relationships (Organization or Person)

**Navigation**
Customer > Organization or Person > Accounts

**Prerequisites**
An account relationship for an organization or person must exist.

**Steps**
Follow these steps to view an account relationship:

1. From the Customer tab, choose an organization or person.

2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
3. Click Go.

To search using Advanced Search:

1. Click the Advanced Search link.
   The Organization or Person Search page opens.
2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the organization or person link to select it.
The Organization or Person Detail Main page opens.

4. Click the Accounts link.

5. Select an account from the summary table by clicking the account’s link.
The Account Detail page opens.

6. Click the Relationships link.

   1. To remove a relationship, locate the related account and click the Erase icon.
   2. To find a related account number, enter the account number and click Go.
      The related account name will populate the field.
   3. To change the relationship type, select from the drop down list.
   4. To change the status, select from the drop down list.
   5. To indicate a reciprocal relationship, select the Reciprocal check box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.

7. Click Update.

Return to Customer Tab Main

360 Degree View (Organization)

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

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

- Viewing 360 Degree View (Organization or Person)

Return to Customer Tab Main

Viewing 360 Degree View (Organization or Person)

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

Navigation
Customer > Organization or Person > 360 View

Prerequisites
None

Steps
Follow these steps to use 360 degree view:

1. From the Customer tab, choose an organization or person.
   The Organization or Person Detail Main page opens.

2. Click the 360 View link.
   A new Organization or Person Detail page, specific to the 360 Degree View, opens.

3. You can view summary pages for each of the following by clicking each link:
   - Orders
   - Invoices
Creating a Note (Organization)

Using Oracle Sales Online

4. Click the link to view the details of any item.

Return to Customer Tab Main

Notes (Organization)

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

- Creating a Note (Organization)
- Viewing a Note (Organization)

Return to Customer Tab Main

Creating a Note (Organization)

Navigation
Customer > Organization > Notes

Prerequisites
The organization must exist.

Steps
Follow these steps to create a note:

1. From the Customer tab, choose an organization.
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
3. Click Go.
   To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search, enter a Search Name.
   4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Click the organization link to select it.
   The Organization Detail Main page opens.
3. Click the **Notes** link.
4. Select a Type from the drop down list.
   You can change the default type using Profiles.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.
   **Note**: You cannot edit notes once they are created.

*Return to Customer Tab Main*

---

**Viewing a Note (Organization)**

**Navigation**
*Customer > Organization > Notes*

**Prerequisites**
The note must exist.

**Steps**
Follow these steps to view a note:
1. From the Customer tab, choose an organization.

To search using Quick Find:
1. Choose Organization from the drop down list.
2. Enter the partial name of the organization for which you are searching.
3. Click Go.

To search using Advanced Search:
1. Click the Advanced Search link.
   The Organization Search page opens.
2. Select search filters and display options.
3. If you want to save the search, enter a Search Name.
4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

2. Click the organization link to select it.
   The Organization Detail Main page opens.

3. Click the Notes link.

4. Select a Type from the drop down list.
   The default type can be changed using Profiles.

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

6. Click Apply.

7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.

8. To view "All Notes" in a printable version, click the All Notes button.

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

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

Return to Customer Tab Main
Tasks (Organization)

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

- Creating a Task (Organization)
- Adding an Attachment to a Task (Organization)

Returning to Customer Tab Main

Creating a Task (Organization)

Navigation
Customer > Organization > Tasks

Prerequisites
None

Steps
Follow these steps to create a task:
1. From the Customer tab, choose an organization.
2. Select Quick Find or Advanced Search.

To search using Quick Find:
1. Choose Organization from the drop down list.
2. Enter the partial name of the organization for which you are searching.
3. Click Go.

To search using Advanced Search:
1. Click the Advanced Search link.
   The Organization Search page opens.
2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the organization link to select it.
   The Organization Detail Main page opens.

4. Click the Sales Team link.

5. Click the Tasks link.

6. Click Create.
   The Create Task page opens.

7. Select Task Type from the drop down list.
   If the task is a private task, select the Private box. This task can only be assigned to you.

8. Enter the Task Name.

9. Enter the Task Description.

10. Choose the Priority from the drop down list.

11. Select the Status from the drop down list.

12. Select a planned start date by clicking the calendar icon and selecting a date.

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

14. Enter the name of the task owner, click Go.

15. Select a task owner by clicking the link from the list of search results.

16. Optionally, you can relate the task to an opportunity, organization, person or relationship, click Go.
   The default, since you are creating the task in the context of an organization, is related to that organization.

17. Click Create.

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

Return to Customer Tab Main
Adding an Attachment to a Task (Organization)

Navigation
Customer > Organization > Attachments

Prerequisites
The task must exist.

Steps
Follow these steps to add an attachment:
1. From the Customer tab, choose an organization.
2. Select Quick Find or Advanced Search.
   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
   2. Select search filters and display options.
   3. If you want to save the search enter a Search Name.
   4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.
3. Click the organization link to select it.
   The Organization Detail Main page opens.
4. Click the Attachments link.
5. Click the Add button.
   The Add Attachment page opens.
6. Enter a description, click Text, File, or URL.
7. Enter Text, click Browse to search for the document, or enter the URL.
8. Click Create or Clear.

Return to Customer Tab Main

Attachments (Organization)

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

- Adding an Attachment (Organization)
- Viewing an Existing Attachment (Organization)

Return to Customer Tab Main

Adding an Attachment (Organization)

Navigation
Customer > Organization > Attachments

Prerequisites
None

Steps
Follow these steps to add an attachment:

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

   To search using Quick Find:
   1. Choose Organization from the drop down list.
   2. Enter the partial name of the organization for which you are searching.
   3. Click Go.

   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Organization Search page opens.
2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Click the organization link to select it.
   The Organization Detail Main page opens.
4. Click the Attachments link.
5. Click Add.
   The Add Attachment page opens.
6. Enter a description, click Text, File, or URL.
7. Enter Text, click Browse to search for the document, or enter the URL.
8. Click Create.

Return to Customer Tab Main

Viewing an Existing Attachment (Organization)

Navigation
Customer > Organization > Attachments

Steps
To view an existing attachment, click the attachment link.

Return to Customer Tab Main

Person Subtab

The following tasks can be performed from the Customer tab, Person subtab:

- Personalizing Person Summary
- Updating Person Summary Table
- Creating a Person
- Maintaining Person Details
— Searching for a Person
— Sending Collateral (Person)
— Creating and Maintaining Relationships (Person)
— Sales Teams (Person)
— Leads (Person)
— Creating Opportunities (Person)
— Maintaining Quote Details
— Interactions (Person)
— Accounts (Person or Organization)
— 360 Degree View (Person)
— Notes (Person)
— Tasks (Person)
— Attachments (Person)

Return to Customer Tab Main

Person Summary

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

— Personalizing Person Summary

Return to Customer Tab Main

Personalizing Person Summary

You can use the Personalize button to define your own personal list of People. The default view is "My People" where you will see details for those people who are also on your sales team.

Navigation
Customer > Person
Steps
Follow these steps to personalize the person summary:

1. Click Personalize.
2. Either choose an existing search by selecting it from the drop down list and click Go OR enter search criteria in Person, Address, Sales Team, Relationship sections, if desired to view consumers.
3. Choose display options.
4. Enter a Search Name.
5. Select the Use as Summary Page Default check box.
6. Click Save, or Save and Apply Search. If you want to search without saving the search, click Search.

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

Return to Customer Tab Main

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

Navigation
Customer > Person

Prerequisites
None

Steps
Follow these steps to update a summary table:

1. To edit the phone number, select the phonebook icon and select a phone number.
2. To edit the email address, select the email address book icon and select another email address.
3. To indicate that this person should no receive mail, select the Do Not Mail check box.
4. If you want this person to receive collateral, select the Collateral Recipient check box.

5. Click Update.

Return to Customer Tab Main

Creating a Person

Navigation
Customer > Person

Prerequisites
None

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

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

2. Click Create.

The Create Person page opens.

The following table describes the fields in the create person section.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Yes</td>
<td>Enter the last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>Yes</td>
<td>Enter the first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>No</td>
<td>Enter the middle name.</td>
</tr>
<tr>
<td>Last Name Pronunciation</td>
<td>No</td>
<td>Enter the phonetic spelling of the last name.</td>
</tr>
<tr>
<td>First Name Pronunciation</td>
<td>No</td>
<td>Enter the phonetic spelling of the first name.</td>
</tr>
<tr>
<td>Preferred Name</td>
<td>No</td>
<td>Enter a preferred name, if applicable.</td>
</tr>
<tr>
<td>Title</td>
<td>No</td>
<td>Select a title from the drop down list.</td>
</tr>
<tr>
<td>Second Title</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
The following table describes the Business Information section.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship</td>
<td>No</td>
<td>Select a relationship from the drop down list.</td>
</tr>
<tr>
<td>Organization</td>
<td>Yes</td>
<td>Select an organization to form the business relationship with.</td>
</tr>
<tr>
<td>Address</td>
<td>No</td>
<td>Enter a business address.</td>
</tr>
<tr>
<td>Manager</td>
<td>No</td>
<td>Find the manager by entering the full or partial name and clicking Go.</td>
</tr>
<tr>
<td>Mail Stop</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>No</td>
<td>Enter the department, if applicable.</td>
</tr>
<tr>
<td>Job Title</td>
<td>No</td>
<td>Enter a job title.</td>
</tr>
<tr>
<td>Job Title Type</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>No</td>
<td>Select a role from the drop down list.</td>
</tr>
<tr>
<td>Business Phone Book</td>
<td>No</td>
<td>Select a phone number from the party list by clicking the phonebook icon.</td>
</tr>
<tr>
<td>Start Date</td>
<td>No</td>
<td>Select a date by clicking the calendar icon.</td>
</tr>
<tr>
<td>Decision Maker</td>
<td>No</td>
<td>Select the check box to indicate that the person is a decision maker.</td>
</tr>
<tr>
<td>Reference</td>
<td>No</td>
<td>Select the check box to indicate the person can be considered a reference.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>No</td>
<td>Select the check box to indicate that no mail is to be sent.</td>
</tr>
</tbody>
</table>
3. In the Personal Information section, you can enter information such as:
   - Personal Phone Book: Select a phone number by clicking the phone book icon
   - Address Type: Select from the list of values
   - Address Lines 1-4: Enter information into the address fields
   - County: Enter information into the field
   - Start Date: Select by clicking the calendar icon and choosing a date
   - Do Not Mail: Select the check box to indicate “do not mail”

4. In the Notes sections, you can enter notes associated with this person.
   1. Select the note type from the drop down list.
   2. Enter text in the Text box.
   3. Click Create.
      You have successfully created a person when the Person Detail Main page opens.

Return to Customer Tab Main

Maintaining Person Details

Navigation
Customer > Person

Prerequisites
A person must exist.

Steps
Follow these steps to maintain person details from the Customer tab:
1. From the Customer tab, select the Person subtab.
   To maintain an existing person, search for the person by:
2. Select Quick Find or Advanced Search.
   To search using the Quick Find function:
1. Choose People from the drop down list.
2. Enter the person’s full or partial name.
3. Click Go.

To search using the Advanced Search function:
1. Click the Advanced Search link.
   The Person Search page opens.
2. Enter search filter information and display options.
3. Click Search. To apply the search and save the search as the same time, choose the Save and Apply Search button.

3. Select a person from the Search Results page by clicking the person’s link.
   The Person Detail page opens.
   The following table describes the Person Details fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Yes</td>
<td>Enter the last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>Yes</td>
<td>Enter the first name.</td>
</tr>
<tr>
<td>Preferred Name</td>
<td>No</td>
<td>Enter the preferred name.</td>
</tr>
<tr>
<td>Title</td>
<td>No</td>
<td>Select a title from the drop down list.</td>
</tr>
<tr>
<td>Suffix</td>
<td>No</td>
<td>Enter a suffix, such as Mr., Mrs., Ms., Dr.</td>
</tr>
<tr>
<td>Gender</td>
<td>No</td>
<td>Select gender from the drop down list.</td>
</tr>
<tr>
<td>Personal Phone Book</td>
<td>No</td>
<td>To change the phone number, click the phone book icon.</td>
</tr>
<tr>
<td>Lifetime Value</td>
<td>No</td>
<td>View the sum of all the orders placed by the customer. This is a read only field.</td>
</tr>
<tr>
<td>External System Number</td>
<td>No</td>
<td>View the external system number.</td>
</tr>
<tr>
<td>Last Name Pronunciation</td>
<td>No</td>
<td>Enter the pronunciation of the last name.</td>
</tr>
</tbody>
</table>
4. In the Personal Addresses section you can edit information such as:
   - Identifying Address: Main address used to identify the person
   - Address History: Address history of the person
   - Map It: Map the address by clicking the icon
   - Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
   - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
   - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
   - Status: Displays the status indicated in the details
   - Type: Displays the address type indicated in the details
   - Select an Existing Address: Enter a full or partial address and click Go
   - Create Address: To create an address, click Create Address

5. In the Product Interests section you can edit information such as:
   - Remove: To remove a product interest item, select the Remove check box

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name Pronunciation</td>
<td>No</td>
<td>Enter the pronunciation of the first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>No</td>
<td>Enter the middle name.</td>
</tr>
<tr>
<td>Second Title</td>
<td>No</td>
<td>Enter the second title, if desired.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>No</td>
<td>Select the date of birth by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Native Language</td>
<td>No</td>
<td>Select the native language from the drop down list.</td>
</tr>
<tr>
<td>Personal Email Address</td>
<td>No</td>
<td>Select an email address by clicking the email phonebook and choosing an address.</td>
</tr>
<tr>
<td>Address Book</td>
<td>No</td>
<td>Select an email address by clicking the email phonebook and choosing an address.</td>
</tr>
<tr>
<td>Last Order Date</td>
<td>No</td>
<td>View the last order date.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>Select from the drop down list.</td>
</tr>
</tbody>
</table>
Searching for a Person

- Product: Select a product from the drop down list
- Comments: Enter comments directly into the comments field

6. In the Personal Interests section you can edit information such as:
   - Remove: To remove a personal interest item, select the Remove check box
   - Interest Type: Select an interest type from the drop down list
   - Comments: Enter comments directly into the comments field

7. In the Restrictions section you can edit information such as:
   - Remove: To remove a restriction item, select the Remove check box
   - Restriction Type: Select a restriction type from the drop down list
   - Start Date: Select a start date by clicking the calendar icon and choosing a date
   - End Date: Select an end date by clicking the calendar icon and choosing a date
   - Reason: Enter a reason into the field

8. Click **Update**.

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

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

Return to Customer Tab Main

---

**Searching for a Person**

**Navigation**
Customer > Person

**Prerequisites**
A person must exist.

**Steps**
Follow these steps to search for a person from the Customer tab:
1. From the Customer tab, select the Person subtab.

2. Select Quick Find or Advanced Search.
   
   To search using Quick Find:
   
   1. Choose Person from the drop down list.
   2. Enter the full or partial last name.
   3. Click Go.

   To search using Advanced Search:
   
   1. Click the Advanced Search link.
      
      The Person Search page opens.
   2. Enter search filters and display options.
   3. Click Search. If you want to apply the search and save the search as the same time, choose the Save and Apply Search button. To use the list as a summary page default, select the "Use as Summary Page Default" check box.

   To select the person, click the person's link. Please note, when searching for a customer (organization or person) the Active Flag indicates customer status and the Address Active Flag indicates address status.

   For the person search, there are two radio buttons at the top of the page:
   
   - Display Relationship Information
   - Display Person Information

   These options are used to display information about the person for which you are searching. The security model is centered on the organization to which the person has a relationship with for displaying relationship information. However, for displaying person information, the security model is centered on the person. Therefore, if the user has access to the person, the search results will display person information. If the user is not on the sales team for the organization, he/she cannot view the organization's relationship information.

   Return to Customer Tab Main

---

**Sending Collateral (Person)**

Send collateral to your business contacts using this feature.
Creating and Maintaining Relationships (Person)

Prerequisites
Fulfillment templates must be set up in the Oracle Marketing Encyclopedia System (MES). Please refer to the Oracle Marketing Encyclopedia System Concepts and Procedures guide for more information on setting up fulfillment templates.

Steps
Follow these steps to send collateral:
1. Select the recipients to which you want to send collateral.
2. Click Send Collateral.
   The Fulfillment Wizard page opens.
3. Select a Template from the drop down list.
4. Click Continue.
5. Select a Master Document by selecting the check box, click Continue.
6. Select Collateral, click Continue.
7. Select the Output Method (email) from the drop down list, and click Continue.
   The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list.
9. Click Done.

Creating and Maintaining Relationships (Person)
In Oracle Sales Online, people can have two types of relationships; Person to Organization and Person to Person. Each relationship is created by clicking the Relationship link from the Customer tab, Person subtab. You can display active, inactive, or all relationships for the person by selecting the appropriate value from the drop down list by clicking the Relationships link. The Relationships link takes you to the Relationships summary page. From this summary table you can view existing Person to Organization, Person to Person relationships, multiple relationship addresses, phone number, start date, end date, and relationship status.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of subject and object existing addresses. If you change one of these addresses, you must complete this action by going to the subject or object
Creating a Person to Organization Relationship

- Creating a Person to Organization Relationship
- Creating a Person to Person Relationship

Return to Customer Tab Main

Creating a Person to Organization Relationship

Navigation
Customer > Person > Relationship

Prerequisites
None

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

1. From the Customer tab, choose the Person subtab.
2. Select Quick Find or Advanced Search.
   
   To search using Quick Find:
   
   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click Go.

   To search using Advanced Search:
   
   1. Click the Advanced Search link.
      
   The Person Search page opens.
   
   2. Enter search filter information and display options.
   3. Click Search.

3. Click the person’s name link to select it.
   The Person Detail Main page opens.
4. Click the Relationships link.
5. Click **Add Relationship** in the Person to Organization Relationships section. The Add Person to Organization Relationship page opens.

6. Search for an organization by entering the full or partial name of the organization in the "Select an Organization" field, and click **Go**.

7. From the Search Results page, select an organization for which you want to create a relationship by clicking the organization’s link. The organization will populate the related Organization field, a required field, on the relationship detail page.

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

9. Enter a Start Date and optionally enter an End Date. If you do not enter a start date, it will default to the current date.

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

11. Select a status from the drop down list.

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

13. Click **Create**.

The Relationship Detail page opens. From this page you can edit details about the relationship, roles, addresses, and restrictions.

- a. View the relationship type.
- b. Edit the start date by clicking the calendar icon and selecting another date.
- c. Edit the phone number by clicking the phone book icon.
- d. Edit the mail stop, department, job title.
- e. Select the preferred language from the drop down list.
- f. Select or unselect the Decision Maker and Reference check boxes.
- g. In the Address section, you can change the following:
  - Identifying address, select or unselect the radio button
  - View the address history by clicking **History**
  - Map the address by clicking the Map It icon
  - Enter a start date and end date by clicking the calendar icon and selecting dates.
Creating a Person to Person Relationship

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

**Navigation**
Customer > Person > Relationships

**Prerequisites**
None

**Steps**
Follow these steps to create a person to person relationship:
1. From the Customer tab, choose the Person subtab.
   
   The People page opens
2. Select **Quick Find** or **Advanced Search**.

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

To search using **Advanced Search**:
1. Click the **Advanced Search** link.
   - The Person Search page opens.
2. Enter search filter information and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Click a person’s name link to select it.
   - You will create a relationship between this person and another person.

4. Click the **Relationships** link.

   From the Person Detail main page, you can do the following in the Person to Person Relationships section:
   - View active, inactive, or all relationships for this person
   - Edit start and end dates by clicking the calendar icon and selecting another date
   - View the status of the relationship
   - Send collateral by selecting the Collateral Recipient check box and clicking **Send Collateral**

5. Click **Add Relationship**.

   The Add Person to Person Relationship page opens.

6. In the Select a Person field, enter the full or partial name and click **Go**.

7. From the Search Results page, select the person for which you want to create the relationship by clicking the person’s link.
   - The person’s name populates the related Person field, a required field, on the Relationship Detail page.

8. Enter the address.
9. Choose a Relationship Type from the drop down list.

10. Enter a Start Date and optionally enter an End Date. If you do not enter a start date, it will default to the current date.

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

12. Select a status from the drop down list.

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

14. Click Create.

   The Relationship Detail page opens. From this page you can edit details about the relationship, roles, addresses, and restrictions.

15. Click Update.

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

Note: The address of the relationship must be an address of the related person.

Return to Customer Tab Main

Sales Teams (Person)

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

- Adding a Sales Team Member (Person)
- Adding a Partner to a Sales Team (Person)
- Adding a Resource Team to a Sales Team (Person)
- Removing a Sales Team Member (Person)

Return to Customer Tab Main

Adding a Sales Team Member (Person)

Navigation
Customer > Person > Sales Team
Prerequisites
None

Steps
Follow these steps to add a sales team member:

1. From the Customer tab, click the Person subtab and search for a person.
   To search using Quick Find:
   1. Choose Person from the drop down list.
   2. Enter the full or partial name using % as a wildcard.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click Search. To apply the search and save the search as the same time, choose the Save and Apply Search button.
2. Select a person by clicking the person’s link.
   The Person Detail page opens.
3. Click the Sales Team link.
4. Enter the last name or partial name of the sales rep in the "Add a Salesperson" field, click Go.
5. If you are searching for a salesperson outside of your Business Unit, choose the business unit from the drop down list, click Go.
6. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
7. Enter territory properties, and click Go.
8. Select a Role from the drop down list.
9. You can view the email address and phone number for this salesperson.
10. Click Update.
Return to Customer Tab Main
Adding a Partner to a Sales Team (Person)

Navigation
Customer > Person > Sales Team

Prerequisites
None

Steps
If you want to add a partner to the sales team, follow these steps:
1. From the Customer tab, click the Person subtab and search for a person.
   To search using Quick Find:
   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click Search. To apply the search and save the search as the same time, choose the Save and Apply Search button.
2. Select a person by clicking the person’s link.
   The Person Detail page opens.
3. Click the Sales Team link.
4. Enter the partner name in the "Add a Partner" field, click Go.
   It is recommended that you search by last name only.
5. Select a partner from the search results page by clicking the link.
6. Click Update.
You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner. Refer to the Oracle Partners Online Concepts and Procedures guide for more detailed information.

Return to Customer Tab Main

Adding a Resource Team to a Sales Team (Person)

Navigation
Customer > Person > Sales Team

Prerequisites
None

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

1. From the Customer tab, click the Person subtab and search for a person.
   
   To search using Quick Find:
   
   1. Choose Person from the drop down list.
   2. Enter the full or partial name of the person. If you enter a partial name, use the % key as a wild card.
   3. Click Go.

   To search using Advanced Search:
   
   1. Click the Advanced Search link.
      
      The Person Search page opens.
   2. Enter search filters and display options.
   3. Optionally enter a Search Name, if you want to save the search.
   4. Click Search.

2. Click the person’s link to select it.

   The Person Detail page opens.

3. Click the Sales Team link.
Removing a Sales Team Member (Person)

4. In the Add a Resource field, enter the resource name using % as a wildcard, and click Go.

5. Select a resource from the search results page by clicking the link.

6. Click Update.

7. Members of resource team will be added to the sales team.

Return to Customer Tab Main

Removing a Sales Team Member (Person)

Navigation
Customer > Person > Sales Team

Prerequisites
A sales team member must exist on the sales team.

Steps
Follow these steps to remove a sales team member:

1. From the Customer tab, click the Person subtab and search for a person.
   To search using Quick Find:
   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click Go.
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click Search. To apply the search and save the search as the same time, choose the Save and Apply Search button.

2. Click the person link to select it.
   The Person Detail page opens.
3. Click the **Sales Team** link.
4. Locate the sales person that you want to remove from the sales team. Please note, you cannot remove the salesperson if they are the only sales team member assigned to the customer.
5. Select the **Remove** check box.
6. Click **Update**.

Return to Customer Tab Main

---

**Leads (Person)**

From the Person subtab, you can maintain lead details.

- **Maintaining Lead Details (Person)**

Return to Customer Tab Main

---

**Maintaining Lead Details (Person)**

**Navigation**

Customer > Person > Leads

**Prerequisites**

A lead must exist.

**Steps**

Follow these steps to main lead details:

1. Search for a person for which you want to edit lead details.

   To search using **Quick Find**:
   1. Choose Person from the drop down list.
   2. Enter the partial name of the person for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
The People Search page opens.

2. Select search filters and display options.

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

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

2. Click the person’s link to select it.

The Person Detail Main page opens.

3. Click the **Leads** link.

The Leads summary page opens.

4. Select a lead by clicking the lead link.

The Lead Detail page opens.

The following table describes each of the lead detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>No</td>
<td>Enter the lead name.</td>
</tr>
<tr>
<td>Customer</td>
<td>No</td>
<td>View the customer number by clicking the link.</td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Enter the location address.</td>
</tr>
<tr>
<td>Project Name</td>
<td>No</td>
<td>Enter the full or partial name of the project and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Assign To</td>
<td>Yes</td>
<td>Enter the full or partial name of the person you want to assign the lead to and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Status</td>
<td>Yes</td>
<td>Select a status from the drop down list.</td>
</tr>
<tr>
<td>Channel</td>
<td>No</td>
<td>Select a channel from the drop down list.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>No</td>
<td>Select a time frame from the drop down list.</td>
</tr>
<tr>
<td>Campaign</td>
<td>Yes</td>
<td>Enter the full or partial name of the campaign and click <strong>Go</strong>.</td>
</tr>
<tr>
<td>Total Budget</td>
<td>No</td>
<td>Enter the total budget and select a currency from the drop down list.</td>
</tr>
<tr>
<td>Decline Reason</td>
<td>No</td>
<td>Enter a decline reason, if applicable.</td>
</tr>
<tr>
<td>Close Reason</td>
<td>No</td>
<td>Enter a close reason, if applicable.</td>
</tr>
</tbody>
</table>
Maintaining Lead Details (Person)

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Number</td>
<td>No</td>
<td>View the lead number.</td>
</tr>
<tr>
<td>Urgent</td>
<td>No</td>
<td>Select the Urgent check box if this is an urgent lead.</td>
</tr>
<tr>
<td>Qualified</td>
<td>No</td>
<td>Select the Qualified check box if the lead is qualified.</td>
</tr>
<tr>
<td>Accepted</td>
<td>No</td>
<td>Select the Accepted check box if the lead is accepted.</td>
</tr>
<tr>
<td>Assigned Date</td>
<td>No</td>
<td>Select an assigned date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>No</td>
<td>Select a lead rank from the drop down list.</td>
</tr>
<tr>
<td>Vehicle Response Code</td>
<td>No</td>
<td>Select a vehicle response code from the drop down list.</td>
</tr>
<tr>
<td>Budget Status</td>
<td>No</td>
<td>Select a budget status from the drop down list.</td>
</tr>
</tbody>
</table>

In the Purchase Items section, you can maintain the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>No</td>
<td>Select the remove check box to remove the purchase item.</td>
</tr>
<tr>
<td>Product Category</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Item ID</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>No</td>
<td>View the unit of measure.</td>
</tr>
<tr>
<td>Quantity</td>
<td>No</td>
<td>Enter the quantity.</td>
</tr>
<tr>
<td>Budget Amount</td>
<td>No</td>
<td>Enter the budget amount.</td>
</tr>
<tr>
<td>Campaign</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
</tbody>
</table>

5. Click Update.

Return to Customer Tab Main
Creating Opportunities (Person)

**Navigation**
Customer > Person > Opportunities

**Prerequisites**
None

**Steps**
Follow these steps to create a new opportunity:

1. From the **Customer** tab, choose the **Person** subtab.
   The People page opens.
2. Select **Quick Find** or **Advanced Search**.
   To search using **Quick Find**:
   1. Choose Person from the drop down list.
   2. Enter the full or partial name using the % as a wildcard.
   3. Click **Go**.
   To search using **Advanced Search**:
   1. Click the **Advanced Search** link.
      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click **Search**.
3. Select a person by clicking the person’s link.
   The Person Detail page opens.
4. Click the **Opportunities** link.
5. Click **Create**.
   The Create Opportunity page opens.
6. From this page you can enter opportunity details, purchase items, contacts, and **notes** information. Any field with an asterisk is a required field.
7. Click **Create**.
If you select the Display Contact Opportunities radio button on the Person Detail Main page shows all opportunities in which this person is a contact on the opportunity. If you select the Display Person Opportunities radio button, you will see all opportunities in which the opportunity if for the person.

Return to Customer Tab Main

Maintaining Quote Details

From the Customer tab you can view and maintain quote details.

Navigation
Quote

Prerequisites
A quote must exist.

Steps
Follow these steps to maintain quote details:

1. Search for the quote using Quick Find or Advanced Search.

   To search using **Quick Find**:
   
   1. Choose Organization or Person from the drop down list.
   2. Enter the partial name of the organization or person for which you are searching.
   3. Click **Go**.

   To search using **Advanced Search**:
   
   1. Click the **Advanced Search** link.

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

2. Click the organization or person link to select it.

   The Organization or Person Detail Main page opens.
3. Click the **Quotes** link. The Quote Detail page opens.

4. Update quote information.

5. Click **Update** to save changes.

Return to Customer Tab Main

---

### Interactions (Person)

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

Oracle Sales Online users cannot create or edit interactions.

- Viewing Interactions (Person)

Return to Customer Tab Main

---

### Viewing Interactions (Person)

**Navigation**

Customer > Person > Interactions

**Prerequisites**

Interactions must exist.

**Steps**

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

Follow these steps to view interactions:

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

2. Select **Quick Find** or **Advanced Search**.
Accounts (Person or Organization)

To search using **Quick Find:**
1. Choose Person from the drop down list.
2. Enter the full or partial name.
3. Click Go.

To search using **Advanced Search:**
1. Click the **Advanced Search** link.
   - The Person Search page opens.
2. Enter search filter information and display options.
3. Click **Search.** To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
4. Select a person from the Search Results page by clicking the person’s name link.
   - The Person Detail page opens.
5. Click the **Interactions** link.
6. You can select filters such as Media Type, Activity, Source, and Date Ranges.
7. Click **Apply** to search for interactions.

**Note:** Oracle Sales Online users cannot create or edit interactions.

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

**Accounts (Person or Organization)**

You can create accounts and maintain the account details from the Person subtab. Click one of the links below to go to the step-by-step instructions in the Customer, Organization section on how to:

- Create an account
- Maintain account details
- View sites
- View roles
- View relationships
360 Degree View (Person)

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

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

- Viewing 360 Degrees (Person)

Viewing 360 Degrees (Person)

Navigation
Customer > Person > 360 View

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

Steps
Follow these steps to use 360 degree view:

1. From the Customer tab, choose a person.
   The Person Detail page opens.

2. Click the 360 View link.
   A new Person Detail page, specific to the 360 Degree View, opens.
3. You can view summary pages for each of the following by clicking each link:
   - Orders
   - Invoices
   - Returns
   - Products
   - Service Requests
   - Quotes

4. Click the link to view the details of any item.

Return to Customer Tab Main

Notes (Person)

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

- Creating a Note (Person)
- Viewing a Note (Person)

Return to Customer Tab Main

Creating a Note (Person)

Navigation
Customer > Person > Notes

Prerequisites
None

Steps
Follow these steps to create a note:

1. From the Customer tab, choose the Person subtab.
2. Select Quick Find or Advanced Search.
   
   To search using Quick Find:
   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click Go.
   
   To search using Advanced Search:
   1. Click the Advanced Search link.
      The Person Search page opens.
   2. Enter search filter information and display options.
   3. Click Search. To apply the search and save the search as the same time, choose the Save and Apply Search button.
   
3. Select a person by clicking the person’s link.
   The Person Detail page opens.

4. Click the Notes link.

5. Select a Type from the drop down list.
   You can change the default type by changing the Profile. Click the Profiles icon in the upper right corner of the application page.

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

7. Enter your notes in the text box.

8. Click Create.
   
   Note: You cannot edit notes once they are created.

Return to Customer Tab Main

Viewing a Note (Person)

Navigation
Customer > Person > Notes
**Prerequisites**
None

**Steps**
Follow these steps to view a note:

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

2. Select **Quick Find** or **Advanced Search**.
   
   To search using **Quick Find**:
   
   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click **Go**.

   To search using **Advanced Search**:
   
   1. Click the **Advanced Search** link.
   
      The Person Search page opens.

   2. Enter search filter information and display options.

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

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

   The Person Detail page opens.

4. Click the **Notes** link.

5. Select a **Type** from the drop down list.

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

7. Click **Apply**.

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

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

**Note:** The profiles that you have chosen determine the number of rows that will display in your notes table. To change your profile preferences, see click the Profile icon in the upper right corner of the page.
Tasks (Person)

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

- Creating a Task (Person)
- Maintaining Task Details (Person)

Creating a Task (Person)

Navigation

Customer > Person > Tasks

Prerequisites

None

Steps

Follow these steps to create a task:

1. Select Quick Find or Advanced Search.
   
   To search using Quick Find:
   
   1. Choose Person from the drop down list.
   2. Enter the full or partial name.
   3. Click Go.

   To search using Advanced Search:
   
   1. Click the Advanced Search link.

   The Person Search page opens.

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

2. Select a person from the Search Results page by clicking the person’s name link. The Person Detail page opens.

3. Click the **Tasks** link.

4. Click **Create**.

5. Select Task Type from the drop down list.

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

6. Enter the Task Name.

7. Enter the Task Description.

8. Choose the Priority from the drop down list.

9. Select the Status from the drop down list.

10. Select a planned start date by clicking the calendar icon and selecting a date.

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

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

13. The "Relate to" field defaults to the person, click **Go**.

   **Note:** If you click the **Clear** button from this page, you will clear all information, including the Person the task is related to. If you continue creating this task by re-entering the information, this task will not be related to this person.

14. Click **Create**.

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

*Return to Customer Tab Main*
Maintaining Task Details (Person)

**Navigation**
Customer > Person > Tasks

**Prerequisites**
A task must exist.

**Steps**
Follow these steps to view a task:

1. Find the person whose tasks you want to view.
2. Click the person’s link.
   
   The Person Detail main page opens.
3. Click the **Tasks** link.
   
   The summary table displays all tasks for the person.
4. Click the task link to view details.
   
   The Task Detail page opens.

The following table describes the Task Detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Type</td>
<td>Yes</td>
<td>Select the task type from the drop down list.</td>
</tr>
<tr>
<td>Private</td>
<td>No</td>
<td>Select the private check box if you want the task to be viewable only by the creator of the task.</td>
</tr>
<tr>
<td>Task Name</td>
<td>Yes</td>
<td>Enter the task name.</td>
</tr>
<tr>
<td>Task Description</td>
<td>No</td>
<td>Enter a description.</td>
</tr>
<tr>
<td>Priority</td>
<td>No</td>
<td>Select priority from the drop down list.</td>
</tr>
<tr>
<td>Date</td>
<td>Yes</td>
<td>Select a date by clicking the calendar and choosing a date.</td>
</tr>
<tr>
<td>Start Time</td>
<td>No</td>
<td>Select a time from the drop down lists.</td>
</tr>
<tr>
<td>Parent Task</td>
<td>N/A</td>
<td>View the parent task details by clicking the link.</td>
</tr>
</tbody>
</table>
5. Click **Update**.

Return to Customer Tab Main

**Attachments (Person)**

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

- Adding an Attachment (Person)

---

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>Yes</td>
<td>Enter the full or partial name, using % as a wildcard, and click <strong>Go</strong>. Select from the search results.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>Select the task status from the drop down list.</td>
</tr>
<tr>
<td>End Time</td>
<td>No</td>
<td>Select an end time for the task from the drop down list.</td>
</tr>
<tr>
<td>Add Attendee</td>
<td>No</td>
<td>Select attendees by entering the full or partial name and clicking <strong>Go</strong>.</td>
</tr>
<tr>
<td>Remove</td>
<td>No</td>
<td>To remove an attendee, select the remove check box.</td>
</tr>
<tr>
<td>Employee</td>
<td>No</td>
<td>Displays the employee who is listed as an attendee.</td>
</tr>
<tr>
<td>Sales Group</td>
<td>No</td>
<td>Displays the sales group the attendee belongs to.</td>
</tr>
<tr>
<td>Job Title</td>
<td>No</td>
<td>Displays the job title of the attendee.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>No</td>
<td>Displays the phone number of the attendee.</td>
</tr>
<tr>
<td>Email</td>
<td>No</td>
<td>A link to the attendee’s email.</td>
</tr>
<tr>
<td>Remove</td>
<td>No</td>
<td>Select the remove check box to remove a relate to item.</td>
</tr>
<tr>
<td>Type</td>
<td>No</td>
<td>Displays the related item type.</td>
</tr>
<tr>
<td>Name</td>
<td>No</td>
<td>Displays the related item name.</td>
</tr>
<tr>
<td>Task Name</td>
<td>No</td>
<td>Links to the child task details.</td>
</tr>
<tr>
<td>Task Type</td>
<td>No</td>
<td>Displays the child task type.</td>
</tr>
<tr>
<td>Date</td>
<td>No</td>
<td>Displays the child task date.</td>
</tr>
</tbody>
</table>
Adding an Attachment (Person)

**Navigation**
Customer > Person > Attachments

**Prerequisites**
None

**Steps**
Follow these steps to add an attachment:
1. From the Customer tab, choose the Person subtab.
2. Select a person.
   The Person Detail page opens.
3. Click the Attachments link.
4. Click Add.
   The Add Attachment page opens.
5. Enter a description, click Text, File, or URL.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click Create.

Viewing an Existing Attachment (Person)

**Navigation**
Customer > Person
Contacts Subtab

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

Return to Customer Tab Main

Contacts Subtab
Within the Customer tab you will find the Contact subtab. From this page, you can easily access organization to person relationships, also referred to as business contacts. You can do the following from the Contact subtab:

- Personalize Contact Summary
- Creating a Contact
- Searching for a Contact
- Maintaining Contact Details
- Managing Relationship Notes
- Creating a Relationship Task
- Managing Relationship Attachments
- Managing Relationship Interactions
- Sending Collateral from the Contact Summary Table

Return to Customer Tab Main

Personalize Contact Summary

Navigation
Customer > Contact

Prerequisites
None

Steps
1. Click the Personalize button.
2. Enter search filters in the Person, Address, Sales Team, Relationship sections, if desired.

3. Select display options and sort options.

4. Enter a Search Name.

5. Select the Use as Summary Page Default check box.

6. Click **Save**, or **Save and Apply Search**.

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

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

**Return to Customer Tab Main**

---

### Creating a Contact

**Navigation**

Customer > Contact

**Prerequisites**

None

**Steps**

1. Click **Create**.

   The Create Contact page opens.

2. Select an existing person or create a new person.

   a. To select an existing person, enter the full or partial name in the "Select a Person" field and click **Go**. From the search results page select the radio button of the person that you want to select and click the **Select** button. Your selection will populate the person field as read-only on the create contact page.

   b. To create a new person, click **Create Person**. At a minimum you must enter the required fields. Click **Create**. The person you create will be added to the database. If you entered or selected an address, that address will populate the address field for the contact.

3. Select a customer for which the person is a contact.
Searching for a Contact

a. Enter the full or partial name of the customer in the Customer field. By default the system searches for an organization.

b. If you want to search for a person, select the Person radio button. Click Go.

c. From the search results page select the radio button to select the customer. Your selection will populate the customer field on the Create Contact page as read-only. If an address is selected using the check box at the bottom of the list of values, it will become the address of the relationship, which overwrites the previously selected address. If you want to change or clear the address, click the Change Address or Clear Address button.

4. Select a Relationship Type from the drop down list. This is a required field.
   In the Relationship Information section:
   a. Select a Start Date and End Date by clicking the Calendar icon and choosing dates.
   b. Select a Phone Number to use from the Phone Book by clicking the phone book icon.
   c. Select an Email Address by clicking the Email Addressbook and selecting from the list of values.
   d. Select a Status from the drop down list of values.
   e. Select Context Value and click ’Go’ to show relevant fields.

5. In the Other Details section, you can enter information such as; Mailstop, Manager, Department, Department Type, Job Title, Job Title Type, Preferred Language, Decision Maker, or Reference.

6. In the Notes section, enter a note if applicable. The required fields are Type, Status, and Note.

7. In the Relate to section, enter information about the "related" entity.

8. Click Create.

Return to Customer Tab Main

Searching for a Contact

Navigation
Customer > Contact
Maintaining Contact Details

Steps
You can search for a contact using Quick Find or Advanced Search.

1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Contact Search page opens.
   2. Enter search filter information and display options.
   3. Click Search.

3. To select the contact, click the contact link.

Navigation
Customer > Contact

Prerequisites
A contact must exist.

Steps
You can search for a contact using Quick Find or Advanced Search.

1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
The Contact Search page opens.
2. Enter search filter information and display options.
3. Click Search.

3. To select the relationship details, click the relationship link.
4. Edit or update information.
5. Click Update.

You can also view details directly from the contact summary table. Follow these steps:

a. View person details by clicking the person link.
b. View person to organization or person to person relationship details by clicking the relationship link.
   Please note, the screen will display differently depending on which type of relationship you select.
c. View party details by clicking the party link.
d. View the identifying relationship address on the summary table.
e. View the email address on the summary table. To edit the email address, click the email address book icon.

Return to Customer Tab Main

Managing Relationship Notes

Navigation
Customer > Contact > Notes

Prerequisites
None

Steps
You can search for a contact using Quick Find or Advanced Search.
1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
2. Enter the contact’s full or partial name.

3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Contact Search page opens.
   2. Enter search filter information and display options.
   3. Click Search.

3. From the search results page, click the relationship link.

4. Click the Notes link.

5. Select a Type from the drop down list.

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

7. Enter your notes in the text box.

8. Click Create.

Note: You cannot edit notes once they are created.

Return to Customer Tab Main

Searching for a Relationship

Navigation
Customer > Contact

Steps
You can search for a contact using Quick Find or Advanced Search.

1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.

2. To search using Advanced Search:
Creating a Relationship Task

**Navigation**
Customer > Contact

**Prerequisites**
None

**Steps**
You can search for a contact using Quick Find or Advanced Search.
1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.
2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Contact Search page opens.
   2. Enter search filter information and display options.
   3. Click Search.
3. From the search results, click the relationship link.
4. Click the Tasks link.
5. Click Create.
   The Create Task page opens.
6. Select Task Type from the drop down list.
   If the task is a private task, select the Private check box.
Managing Relationship Attachments

7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the task owner, click Go.
14. Select a task owner by clicking the link from the list of search results.
15. Click Create.

Managing Relationship Attachments

**Navigation**
Customer > Contact

**Prerequisites**
None

**Steps**
You can search for a contact using Quick Find or Advanced Search.

1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.

2. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Contact Search page opens.
   2. Enter search filter information and display options.
3. Click Search.
3. From the search results, click the relationship link.
4. Click the Attachments link.
5. Click Add.
   The Add Attachment page opens.
6. Enter a description, click Text, File, or URL.
7. Enter Text, click Browse to search for the document, or enter the URL.
8. Click Create.
   Return to Customer Tab Main

Searching for a Relationship Attachment

Navigation
Customer > Contact

Steps
1. From the Customer tab, click the Contact subtab.
   You can search for a contact using Quick Find or Advanced Search.
2. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.
3. To search using Advanced Search:
   1. Click the Advanced Search link.
      The Contact Search page opens.
   2. Enter search filter information and display options.
   3. Click Search.
4. To select the relationship details, click the relationship link.
   Return to Customer Tab Main
Managing Relationship Interactions

**Navigation**
Customer > Contact > Interactions

**Prerequisites**
None

**Steps**
You can search for a contact using Quick Find or Advanced Search.

1. To search using Quick Find:
   1. Choose Contacts from the drop down list.
   2. Enter the contact’s full or partial name.
   3. Click Go.
2. To search using Advanced Search:
   1. Click the **Advanced Search** link.
      The Contact Search page opens.
   2. Enter search filter information and display options.
   3. Click **Search**.
3. To select the relationship details, click the relationship link.
4. Click the **Interactions** link.
5. Click a link to view details.

Return to Customer Tab Main

Sending Collateral from the Contact Summary Table

**Navigation**
Customer > Contact

**Steps**
Follow these steps to send collateral:
1. Select the contact’s Collateral Recipient check box to send collateral to the contact or use the Select All button to send collateral to all contacts on the summary table.

2. Click Send Collateral.

3. You will be prompted to complete the fulfillment request.

Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab. Please refer to the Oracle Customer Intelligence Concepts and Procedures guide for more information about these reports.

Partner Tab

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

- Create a Partner
- Create a Person/Contact

Please refer to the Oracle Partners Online Concepts and Procedures guide for more information.

Create a Partner

Navigation
Partner

Prerequisites
None

Steps
Follow these steps to create a partner:
1. **Click Create.**

The Create Partner page opens.

The following table describes the Create Partner fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Organization</td>
<td>No</td>
<td>Find an organization by entering a name, selecting a state and clicking Go.</td>
</tr>
<tr>
<td>Organization</td>
<td>Yes</td>
<td>Enter the organization.</td>
</tr>
<tr>
<td>Alias</td>
<td>No</td>
<td>Enter an alias, if applicable.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>No</td>
<td>Enter a phone number.</td>
</tr>
<tr>
<td>Phone Type</td>
<td>No</td>
<td>Select a phone type from the drop down list.</td>
</tr>
<tr>
<td>Email Address</td>
<td>No</td>
<td>Enter an email address.</td>
</tr>
<tr>
<td>Customer Category</td>
<td>No</td>
<td>Select a customer category code from the drop down list.</td>
</tr>
<tr>
<td>Annual Revenue</td>
<td>No</td>
<td>Select an annual revenue currency from the drop down list and enter the annual revenue.</td>
</tr>
<tr>
<td>Fiscal Year End</td>
<td>No</td>
<td>Select the fiscal year end from the drop down list.</td>
</tr>
<tr>
<td>Total Employees</td>
<td>No</td>
<td>Enter the total number of employees.</td>
</tr>
<tr>
<td>Year Established</td>
<td>No</td>
<td>Enter the year established.</td>
</tr>
<tr>
<td>Web Site</td>
<td>No</td>
<td>Enter the web site address.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>No</td>
<td>Select the do not mail check box if the partner should not receive mail.</td>
</tr>
<tr>
<td>Business Line</td>
<td>No</td>
<td>Enter the business line.</td>
</tr>
<tr>
<td>SIC Code</td>
<td>No</td>
<td>Enter the Standard Industry Code.</td>
</tr>
<tr>
<td>DUNS Number</td>
<td>No</td>
<td>Enter the Dunn and Bradstreet number.</td>
</tr>
<tr>
<td>Tax ID</td>
<td>No</td>
<td>Enter the tax identification number.</td>
</tr>
</tbody>
</table>
Use the following table to identify the Partner Detail fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship Type</td>
<td>No</td>
<td>Select the relationship type from the drop down list.</td>
</tr>
<tr>
<td>Purchase Method</td>
<td>No</td>
<td>Select the purchase method from the drop down list.</td>
</tr>
<tr>
<td>Target Revenue</td>
<td>No</td>
<td>Select a currency from the drop down list and enter the target revenue.</td>
</tr>
<tr>
<td>Channel Manager Name</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Phone Support Person</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Relationship Type</td>
<td>No</td>
<td>Select the relationship type from the drop down list.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Type</td>
<td>Yes</td>
<td>Select an address type from the list of values.</td>
</tr>
<tr>
<td>Primary</td>
<td>No</td>
<td>Select the primary check box if the address is considered the primary address.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Yes</td>
<td>Enter the address.</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>No</td>
<td>Enter additional address information.</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>No</td>
<td>Enter additional address information.</td>
</tr>
<tr>
<td>Address Line 4</td>
<td>No</td>
<td>Enter additional address information.</td>
</tr>
<tr>
<td>County</td>
<td>No</td>
<td>Enter the county.</td>
</tr>
</tbody>
</table>
If you want to add a Person Relationship, the following table describes the Person Relationship fields.

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an Organization</td>
<td>Yes</td>
<td>If you are going to add an organization relationship, enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Erase</td>
<td>No</td>
<td>To erase a relationship from the summary table, click the erase icon.</td>
</tr>
<tr>
<td>Relationship</td>
<td>Yes</td>
<td>Select a relationship from the drop down list.</td>
</tr>
<tr>
<td>Related Organization</td>
<td>Yes</td>
<td>This field holds the name of the related organization.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Yes</td>
<td>Select a start date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>End Date</td>
<td>No</td>
<td>Select an end date by clicking the calendar icon and choosing a date.</td>
</tr>
</tbody>
</table>

2. Click Create.

Return to Partner Tab

Create a Person/Contact

**Navigation**

Partner

**Prerequisites**

None

**Steps**

Follow these steps to create a contact:

1. Click Create.

The Create Person page opens.

2. The only required fields are Last Name and First Name, indicated with an asterisk.
The following table describes each field in the Create Person page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Yes</td>
<td>Enter the last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>Yes</td>
<td>Enter the first name.</td>
</tr>
<tr>
<td>Preferred Name</td>
<td>No</td>
<td>Enter a preferred name, if applicable.</td>
</tr>
<tr>
<td>Title</td>
<td>No</td>
<td>Select a title from the drop down list.</td>
</tr>
<tr>
<td>Suffix</td>
<td>No</td>
<td>Enter a suffix, if applicable.</td>
</tr>
<tr>
<td>Gender</td>
<td>No</td>
<td>Select a gender from the drop down list.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>Select a status from the drop down list.</td>
</tr>
<tr>
<td>Phonetic Last Name</td>
<td>No</td>
<td>Enter the phonetic last name.</td>
</tr>
<tr>
<td>Phonetic First Name</td>
<td>No</td>
<td>Enter the phonetic first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>No</td>
<td>Enter the middle name.</td>
</tr>
<tr>
<td>Second Title</td>
<td>No</td>
<td>Enter the second title, if applicable.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>No</td>
<td>Select a date of birth by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Native Language</td>
<td>No</td>
<td>Select the native language from the drop down list.</td>
</tr>
</tbody>
</table>

In the Business Information section, you can enter information which is described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship</td>
<td>No</td>
<td>Select a relationship from the drop down list.</td>
</tr>
<tr>
<td>Address</td>
<td>No</td>
<td>Enter a business address.</td>
</tr>
<tr>
<td>Manager</td>
<td>No</td>
<td>Find the manager by entering the full or partial name and clicking Go.</td>
</tr>
<tr>
<td>Department</td>
<td>No</td>
<td>Enter the department, if applicable.</td>
</tr>
</tbody>
</table>
If you want to add personal information, the following table describes the Personal Information fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td>No</td>
<td>Enter a job title.</td>
</tr>
<tr>
<td>Role</td>
<td>No</td>
<td>Select a role from the drop down list.</td>
</tr>
<tr>
<td>Business Phone Book</td>
<td>No</td>
<td>Select a phone number from the party list by clicking the phonebook icon.</td>
</tr>
<tr>
<td>Start Date</td>
<td>No</td>
<td>Select a date by clicking the calendar icon.</td>
</tr>
<tr>
<td>Decision Maker</td>
<td>No</td>
<td>Select the check box to indicate that the person is a decision maker.</td>
</tr>
<tr>
<td>Reference</td>
<td>No</td>
<td>Select the check box to indicate the person can be considered a reference.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>No</td>
<td>Select the check box to indicate that no mail is to be sent.</td>
</tr>
<tr>
<td>Organization</td>
<td>No</td>
<td>Enter the full or partial name and click Go.</td>
</tr>
<tr>
<td>Mail stop</td>
<td>No</td>
<td>Enter the mail stop.</td>
</tr>
<tr>
<td>Department Type</td>
<td>No</td>
<td>Select department type from the drop down list.</td>
</tr>
<tr>
<td>Job Title Type</td>
<td>No</td>
<td>Select job title type from the drop down list.</td>
</tr>
<tr>
<td>Preferred Language</td>
<td>No</td>
<td>Default is English. Select from the drop down list.</td>
</tr>
<tr>
<td>Business Email Addressbook</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

If you want to add personal information, the following table describes the Personal Information fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Phone Book</td>
<td>No</td>
<td>Select a phone number from the phone book by clicking the phonebook icon.</td>
</tr>
<tr>
<td>Address Type</td>
<td>Yes</td>
<td>Select an address type from the list of values.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Yes</td>
<td>Enter the address.</td>
</tr>
</tbody>
</table>
Create a Person/Contact

3. In the Notes sections, you can enter notes associated with this person.
   a. Select the note type from the drop down list.
   b. Enter text in the Text box.
   c. Click Create.

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

4. Click Create.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 2</td>
<td>No</td>
<td>Enter additional address information.</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>No</td>
<td>Enter additional address information.</td>
</tr>
<tr>
<td>Address Line 4</td>
<td>No</td>
<td>Enter additional address information.</td>
</tr>
<tr>
<td>County</td>
<td>No</td>
<td>Enter the county.</td>
</tr>
<tr>
<td>Start Date</td>
<td>No</td>
<td>Select a start date by clicking the calendar icon and choosing a date.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>No</td>
<td>Select the do not mail check box so that mail will not be sent to the address.</td>
</tr>
<tr>
<td>Personal Phone Book</td>
<td>No</td>
<td>Select a phone number from the phone book by clicking the phonebook icon.</td>
</tr>
<tr>
<td>Personal Email Address Book</td>
<td>No</td>
<td>Select an email address by clicking the icon.</td>
</tr>
<tr>
<td>City</td>
<td>No</td>
<td>Enter in the city field.</td>
</tr>
<tr>
<td>State</td>
<td>No</td>
<td>Select from the drop down list.</td>
</tr>
<tr>
<td>Province</td>
<td>No</td>
<td>Select from the drop down list.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>No</td>
<td>Enter in the postal code field.</td>
</tr>
<tr>
<td>Country</td>
<td>Yes</td>
<td>Select country from the drop down list.</td>
</tr>
<tr>
<td>End Date</td>
<td>No</td>
<td>Select an end date by clicking the calendar icon and choosing a date.</td>
</tr>
</tbody>
</table>
Compensation Tab

To find more information about partners, refer to the Oracle Partners Online Concepts and Procedures guide.

Return to Partner Tab

Compensation Tab

Oracle Sales Online’s Compensation tab consists of four subtabs; Planning, Compensation Plan, Income Planner, and Reports. Depending on your sales role, you can use the Compensation tab to do the following:

- View your quota estimate
- Estimate your commissions using Income Planner
- Review commission reports
- Allocate quotas
- Approve compensation plans

For information about using the compensation functionality in Oracle Sales Online, please refer to the Oracle Incentive Compensation Concepts and Procedures guide.

Return to Oracle Sales Online Main Menu

Fulfillment Tab

The Fulfillment tab allows you to send centrally stored collateral to your customers. Collateral is defined as email, fax, or letter templates that are set up in the Marketing Encyclopedia System (MES) application. The 1:1 Fulfillment Wizard will walk you step-by-step through the process of sending collateral.

- Sending Collateral

Return to Oracle Sales Online Main Menu

Sending Collateral

Send collateral to your business contacts using this feature.

Navigation

Fulfillment
Prerequisites
Fulfillment templates must be set up in the Oracle Marketing Encyclopedia System (MES). Please refer to the Oracle Marketing Encyclopedia System Concepts and Procedures guide for more information on setting up fulfillment templates.

Steps
Follow these steps to send collateral:

1. Select the recipients to which you want to send collateral.
2. Click Send Collateral.
   The Fulfillment Wizard page opens.
3. Select a Template from the drop down list.
4. Click Continue.
5. Select a Master Document by selecting the check box, click Continue.
6. Select Collateral, click Continue.
7. Select the Output Method (email) from the drop down list, and click Continue.
   The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list, and click Done.

Option 2
Optionally, you can send collateral by following these steps.

1. From the Fulfillment tab, click the Status subtab.
2. Click Create.
3. Enter Person Search criteria, click Search.
4. Click Send Collateral.
   The Fulfillment Wizard page opens.
5. Select a Template from the drop down list.
6. Click Continue.
7. Select a Master Document by selecting the check box, click Continue.
8. Select Collateral, click Continue.
9. Select the Output Method (email) from the drop down list, and click Continue.
The Fulfillment Request Confirmation page opens.

10. Select the Priority from the drop down list, and click **Done**.

**Note:** Only Master Documents (mail merge template) and Collateral (attachments to email) attached to a template in MES (setup in Fulfillment Manager) will appear for selection once a template is selected for a fulfillment request. You can use only one template per request.

**Administration Tab**

The Oracle Sales Online Administration tab consists of seven subtabs; General, Marketing, Partner, Sales, Incentive, Collections, and Resources. With the Oracle Sales Administrator role, you have access to these tabs to edit information that influences the way the application works.

From the General subtab, you can manage the following areas:

- **Customer Administration**
  - Classifications
  - Relationships
- **Globalization**
  - Calendar Type
  - Accounting Calendar
  - Type Mapping
  - Period Rate
  - GL Daily Rate
  - Transaction Calendar

From the Sales subtab, you can manage the following areas:

- **Menu Administration**
- **Home Page**
  - Setting Up Home Page Bins Accessibility
  - External Tools
  - Home Page Message
- **Sales Category**
[List of topics under Administration Tab]

- Interest Types
- Interest Code
- Interest Status
- Plan Element Mapping

- Call Center
  - Campaign Assignments
  - Agent Assignments
  - Outcome Assignments
  - Web Assistance

- Lead
  - Lead Scorecard
  - Lead Rank Mapping
  - Lead Import

- Opportunity
  - Win Probability
  - Sales Stage
  - Status Code
  - Sales Methodology

- Forecast
  - Forecast Category
  - Forecast Category Mapping
  - Budget/Revenue Entry

- Accesses
  - Territory
  - Resource
  - Customer
  - Lead
  - Opportunity
For details about Marketing setups, please refer to the *Oracle Marketing Online Implementation Guide*.

For details about Collections setups, please refer to the *Oracle Collections Implementation Guide*.

Return to Oracle Sales Online Main Menu

**Customer Administration**

From the Customer Administration section, you can manage classifications and relationships.

- Classifications
- Relationships

**Classifications**

You can use party classification scheme to classify parties or other business entities into various categories. A classification scheme includes a class category and a class code. The class category is a broad subject within which you can classify parties. The class code is a specific value of the category.

---

**Note:** Sales applications support only one level of classifications. They do not support classification hierarchies.

---

For example, if you want to know the industry sector to which a party belongs, you can use a pre-defined class category, such as 'SIC 1987', which includes the 1987 version of standard industrial classification codes. You can also define your class categories for your own purposes. For example, you may define a class categories to determine if there is any special business considerations, special pricing arrangements, or special terms for a party.

The database already contains a number of classification schemes already set up for you. These are:

NACE: General Industrial Classification of Economic Activities within the European Community (NACE, Revision 1).

Use this procedure if you wish to create classifications of your own. In the user interface, the classification scheme you are creating is called a Class or Classification. The individual values within the classification scheme are called Classification Codes.

Prerequisites
If you wish to create your own system of classification for your customers, you must design the system first and have a printout ready before you start this procedure.

The user interface permits you to enter complex hierarchical classifications, but the hierarchy is not displayed. You must know the parents and children of each classification node in the tree before you can input them.

Using this software you build your hierarchy of codes from the top down by adding child nodes. For this reason you may want to name your classification codes in a way that will help you find all of the child node for each level. If the code names for classification codes at the same level share the same characters, then you can find and add them as children all at the same time.

Navigation
Administration > General > Customer Administration > Classification

Steps
On the Classification page, the Class column lists the classifications already available to you.

1. Click Create.

   The Create Classification page appears.

2. Enter a name for your classification scheme in Class.

3. Select one or more check boxes which represent the rules that will govern the relationships between the different nodes in your classification scheme hierarchy. The available rules are:

   - Allow Multiple Parents: Selecting this check box means that any node in your hierarchy can have more than one parent. Leaving this check box unselected permits only one parent.
Classifications

- Allow Leaf Nodes Only: Restricts you to assigning only the leaf nodes of any class code hierarchy. This means only those codes that have no children. Leaving this check box unselected means that you can use any class codes for this class category.

- Allow Multiple Assignments: Selecting this check box permits sales application agents to classify a customer, an opportunity, or other object using more than one code from the class category you are creating. Leaving this check box unselected restricts agents to using only one code.

4. Use the Owner Table drop-down list to select HZ-PARTIES. This is the only table where you can set up classifications. In this release, you can only set up classifications for customers.

5. Use the Column drop-down list to select PARTY_ID. This is the only column where you can set up classifications.

6. Optionally, you can enter an SQL Where condition in the Condition column.

7. Click Create.

   The Class Detail page appears. You are now ready to create the classification codes for the classification you have created.

8. Click Classification Codes.

   The Classifications page appears.

9. Enter all of the codes, both the nodes and leaves in the hierarchy, by making entries in the following fields:

   - Code: This is the name you will use to build your classification hierarchy.

   - Meaning: This is what the user sees when they use your classification scheme.

   - Description: An optional description.

10. Click Update.

    The page updates, The codes you entered in the Code column turn into links. You are now ready to create the hierarchy of codes you have entered.

    This is done by adding child codes, so you must start at the top of the hierarchy and work your way down.

11. To create a classification hierarchy of the classification codes, then, for each code:

    a. Click on the link in the Code column.
The Classification Detail page appears.

The Parent Code region lists all of the parents of this code. Unless the Allow Multiple Parents check box is selected for this class, you can have only one parent in this list.

The Child Code region lists all codes in the level below this code in the hierarchy.

b. In the Add a Class Code field, enter the code name or a partial code name for the code(s) you wish to enter as children. You can use the % sign for any missing letters.

c. Click Go.

The Select Class Code page appears listing the results of your search. You can keep this page open and use the search at the top to search for additional source codes.

d. Select the Select check boxes for any codes you wish to add as children.

e. Click Go.

The Classification Detail page appears. The Child Code column now lists the child nodes you have selected.

f. Enter the required Start Date for each child node. You can use the date button to select the date from the calendar.

g. Click Update.

You are now ready to add additional child nodes. You can go back to the Select Class Code page to search for additional child codes to add to this node. Or you can click on the link of any of the child nodes on this page to add children to those nodes.

**Relationships**

Agents using any sales product can capture a wide variety of relationships. These include:

- Business relationships between two individuals, such as "reports to".
- Personal relationships between two individuals, such as "parent of" and "child of".
- Relationships between individuals and organizations, such as "employee of" and "manager of".
Relationships between different organizations, such as "subsidiary of".

- Relationships between outside organizations and your own internal organizations. For example, "competitor of".

Agents capture these relationships by making a selection from a list of values. There is no limit to the number of relationships or the combination of relationships the agent can capture for any one person or organization.

**Relationship Subjects, Objects, and Party Types**

All relationships have a subject and an object. For example, in the relationship "father of", the father is the subject. The child is the object. The subject and the object can be of the same or different party types. In the case of "father of", both parties to the relationship are persons. In case of "member of", the subject is a person and the object is an organization. Because it makes no sense for an agent to enter a relationship for the wrong party types, you must specify the valid party types for both the subject and the object of the relationship. This prevents an agent from entering "father of" when they are entering a relationship between two organizations, for example. This setup is required for any new relationship you create.

**Navigation**

Administration > General > Customer Administration > Relationships

**Prerequisites**

None

**Steps**

On the Relationships page, the Relationships table lists the current relationships already available to you.

1. Click Create.

   The Create Relationships page appears.

2. If you are setting up a reciprocal relationship, then:

   a. Enter the name for the reciprocal relationship in the Relationship field. This name is for implementer use only. It helps you identify the setup you are creating and is not visible to users of sales applications.

   b. Select the relationship you wish to setup using the Forward Relationship Code drop-down list.
c. Select the reciprocal relationship using the Backward Relationship Code drop-down list. This is the relationship that is recorded automatically by the application when the agent selects the entry you made in Forward Relationship Code.

d. Using the Subject Name drop-down list, select the party to which this relationship setup applies. For example, for the relationship "Member of," select Person. Valid parties for sales applications are: Person and Organization.

e. Using the Object Name drop-down list, select the party that can be the object of this relationship. For example, for the relationship "Member of," select Organization because people are members of organizations. Valid parties for sales applications are: Person and Organization.

f. Using the Directional Code drop-down list, select either Parent or Child. For this release, it does not matter which of these two values you select.

g. Select the Enabled check box. This is required.

h. Select the Create Party check box. This is required as sales applications create a new party in the database whenever an agent enters a relationship.

You have now completed the setup of the first half of a reciprocal relationship. Now you must set up the relationship in the other direction.

Suppose, for example you just set up the relationship "Parent of" to automatically create the relationship "child of" for the object of that relationship. Now you must set up "Child of" to automatically create "Parent of". This way an agent can select either relationship and the application will always create the opposite.

i. Repeat the above steps to capture the relationship in the other direction. This means switching the entries in the Relationship and Forward Relationship and the Subject Name and Object Name fields.

3. If you are setting up a non-reciprocal relationship, then:

a. Enter the name of the relationship setup you are creating in the Relationship field. This name is for implementer use only. It helps you identify the setup you are creating. It is not visible to users of sales applications.

b. Select the relationship you wish to setup using the Forward Relationship Code drop-down list.
c. There is no reciprocal relationship, so leave the Backward Relationship Code field blank.

d. Using the Subject Name drop-down list, select the party to which this relationship setup applies.

e. Using the Object Name drop-down list, select the party that can be the object of this relationship. Valid parties for sales applications are: Person and Organization.

f. Using the Directional Code drop-down list, select either Not Directional.

g. Select the Enabled check box. This is required.

h. Select the Create Party check box. This is required as sales applications create a new party in the database whenever an agent enters a relationship.

4. Click Create.

Globalization

You can manage the following items from the Globalization section:

- Calendar Type
- Accounting Calendar
- Type Mapping
- Period Rate
- GL Daily Rate
- Transaction Calendar

Calendar Type

Navigation
Administration > General > Globalization > Calendar Type

Steps
1. To search for calendar types:
   a. Select a Year Type from the drop down list.
b. Enter a Period Type.

c. Click Search.

2. To create a new calendar type:
   a. In the first blank Period Type field, enter the period type you want to create. This is a required field.
   b. Enter the number of Periods Per Year (between 1 and 366 days). This is a required field.
   c. Select a Year Type from the drop down list. This is a required field.
   d. Optionally, enter a Description.

3. Click Update to save your work.

Accounting Calendar

Navigation
Administration > General > Globalization > Accounting Calendar

Search for an Existing Accounting Calendar

Steps
To search for an existing Accounting Calendar:
1. Select a Calendar from the drop down list. This is a required field.
2. Enter a Period Name.
3. Enter a Start Date.
4. Enter an End Date.
5. Click Search.

Create a New Accounting Calendar

To create a new accounting calendar:
1. Either click the Create button or in the first blank Prefix field, enter a prefix for the accounting calendar you want to create. This is a required field.
2. Select a Type from the drop down list. This is a required field.
3. Enter a Year. This is a required field.
4. Enter a Quarter. This is a required field.
5. Enter a Number. This is a required field.
6. Select a From and To Date by clicking the Calendar icon. These are required fields.
7. Enter an calendar name.
8. Click Create from the create accounting calendar page OR if you created the calendar on the summary page, click Update.

Note: The number is validated against Periods Per Year for the period type defined in Calendar Type.

Type Mapping

Navigation
Administration > General > Globalization > Type Mapping

Steps
1. Set the profile option "OS: Forecast Calendar" with a calendar name.
2. Select the calendar defined in the previous profile option "OS: Forecast Calendar".

Create a New Type Mapping

To create a new type mapping:
1. In the first blank Period Type field, select a period type from which you want to set the conversion rates from the drop down list. This is a required field. Make sure that the calendar you are using is the forecast calendar.
2. Select the Conversion Type from the drop down list. This is a required field.
3. Enter a Description.
Period Rate

**Navigation**
Administration > General > Globalization > Period Rate

**Steps**
The Pseudo Period Rates page opens.

1. To search for Pseudo Period Rates:
   a. Select a Calendar from the drop down list.
   b. Enter the full or partial name of the Period Name, using % as a wildcard, click Go.
   c. Select a Start or End Date under the Mapping Date.
   d. Click Search.

2. To create a new period rate:
   a. On the first blank Period Name line, enter a full or partial period name, using % as a wildcard. Click Go. This is a required field.
   b. Select the currency you want to convert From from the drop down list. This is a required field.
   c. Select the currency you want to convert To from the drop down list. This is a required field.
   d. Conversion Type is automatically populated from Period Name list of values in a previous step.
   e. Enter the rate in the Rate field.
   f. The **Updatable** and **Deletable** checkboxes display if the pseudo period rates can be changed. If you need to change the status of these checkboxes, click the Type Mapping link.

3. Click Update to save your work.

e. Select the **Updatable** and **Deletable** checkboxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).
GL Daily Rate

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

**Navigation**
Administration > General > Globalization > GL Daily Rate

**Steps**
The GL Daily Rate page opens.

1. To search for a GL Daily Rate:
   a. Select a From Currency from the drop down list.
   b. Select a To Currency from the drop down list.
   c. Select a Conversion Date by clicking the Calendar icon.
   d. Select a Conversion Type from the drop down list.
   e. Click Search.

2. To create a new daily rate:
   a. Select the first blank From Currency field and choose the currency you are converting from the drop down list. This is a required field.
   b. In the To Currency field, select the currency you want to convert to from the drop down list. This is a required field.
   c. Click the Calendar icon to select a Conversion Date. This is a required field.
   d. Select a Conversion Type from the drop down list. This is a required field.
   e. Enter the Conversion Rate in the field provided. This is a required field. The Inverse Conversion Rate is calculated and provided automatically.

If the profile "Daily Rates Window: Enforce Inverse Relationship During Entry" is set to Yes, the application ensures that the conversion rate and the inverse conversion rate always have an inverse relationship. If either rate is changed, the application automatically recalculates the other as the inverse of the changed rate. If the profile option is set to No, then the application will not enforce the inverse relationship. You can change either of the rates independently.
Menu Administration

Using Oracle Sales Online

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f. Click the Enter by Date Range button which allows you to enter conversions for a date range.

3. Click Update to save your work.

Transaction Calendar
No help is currently available.

Menu Administration
The Menu Administration page is used to organize the side panel navigation menus for Oracle Sales Online. By re-sequencing menus, creating parent/child menus, and re-naming menus, you can organize the side panel navigation to your preferences.

■ Resequence Side Panel Navigation Menus
■ Change the Menu Name
■ Create a Parent Menu
■ Create Your Own Menu

Navigation
Administration > Sales > Menu Administration
The Side Navigation page opens.

Resequence Side Panel Navigation Menus
You can use this feature to re-organize your side panel navigation menus.

Steps
1. Select a Menu Name from the drop down list.
2. Click Go.
3. Enter the appropriate sequence number in the Sequence field.
4. Click Update.

Change the Menu Name
You can use this feature to change the names of menus.
Steps
1. Select a Menu Name from the drop down list.
2. Click Go.
3. Enter the new menu name in the Attribute Text field.
   For seeded menus, it is recommended that you do not change the Function Name.
4. Click Update.

Create a Parent Menu
You can use this feature to create parent menus. For example, if you want Classifications to become a parent menu of Relationships, indicate the parent and child menu relationship here.

Steps
1. Select a Menu Name for which you want to create a parent menu for from the drop down list.
2. Click Go.
3. Select the parent menu from the Parent Attribute drop down list. This parent attribute will become the parent menu of the menu you previously selected.
4. Click Update.

Create Your Own Menu

Steps
1. In the first blank line on the page, enter a Sequence number for the menu to appear in the side navigation panel. For example, if you have Menu A in sequence number 15 and Menu B in sequence number 20, you can fit Menu C in between A and B by entering 16 in the Sequence field.
2. Enter an attribute in the Attribute Field.
3. Enter the menu name that you want to display in the Attribute Text field.
   For seeded menus, it is recommended that you do not change the Function Name.
4. If you want this menu to be a child menu, select the parent menu from the Parent Attribute drop down list.

5. Click Update.

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Home Page

Use these tools to manage home page information:

- Setting Up Home Page Bins Accessibility
- External Tools
- Home Page Message

Back to Administration Tab Main

Setting Up Home Page Bins Accessibility

The home page displays selected bins, or snapshots, of information within Oracle Sales Online. You can manage which responsibility has access to which bins through the Home Page Bins link from the Administration tab.

Navigation
Administration > Sales > Home Page > Home Page Bins

Steps
1. The Home Page Bins Administration page opens.
2. Select the Application from the drop down list. Oracle Sales Online is listed as Oracle Field Sales.
3. Select the Responsibility for which you want to give bin access from the drop down list.
4. Click Search.
5. Restrict access to the bin by selecting the Disable checkbox. Giving access to a bin means that you did not select the Disable checkbox.
6. Click Update.

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External Tools

Oracle Sales Online has the ability to provide links to external sites as well as ERP applications. The Sales Online Administrator can configure the links using the External Tools under the Administration tab.

- Setting up Links to External Sites
- Setting up Links to ERP Applications

Setting up Links to External Sites

**Navigation**
Administration > Sales > Home Page > External Tools

**Steps**
1. Enter the following required fields:
   - Category
   - Link text: This text will show on the page.
   - Link type (e.g., for a URL, http://www.oracle.com)
   - Description
2. Set the Link Type to URL from the drop down list.
3. Select the Enabled checkbox.
4. Click **Update**.

Setting up Links to ERP Applications

**Navigation**
Administration > Sales > Home Page > External Tools

**Steps**
1. Enter the following required fields:
   - Category
   - Link text
2. Choose Function in the Link Type drop down list.
3. Select the Enabled checkbox.
4. Click the **Update** button.

This tool is now available from the Home Page under Tools.

Users will only be able to access the ERP application if they have the appropriate responsibility for that application. In order to specify the responsibility for a user, in the FORMS application, choose "System Administrator" responsibility, then Security > Use > Define. Query on the user name and add in the responsibility and application name if they are not listed there.

Bounce the Apache server after making any changes to the tools administration.

**Home Page Message**

Create or edit the message that is displayed in the upper right section of the home page. This message can be customized using HTML tags.

**Navigation**

Administration > Sales > Home Page > Home Page Message

**Steps**

1. Enter a new message in the text box.
   
   You can use HTML to customize the message.

2. Click **Update** to save your work.

**Sales Category**

Use the following information to manage the sales category section:

- **Interest Types**
- **Interest Code**
Interest Types

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

The Interest Type classification has three layers:
- Interest Type
  - Primary Interest Type
    - Secondary Interest Code

Use the following procedure to define Interest Types.

Navigation
Administration > Sales > Sales Category > Interest Types

Search for an Interest Type

Steps
1. Select a Type from the drop down list.
2. Enter a Description.
3. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).
4. Click Search.

Create a New Interest Type

Steps
1. Select the first blank Type field and enter the name of the new interest type. This is a required field.
2. Optionally, enter a description.

3. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Oppportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).

   **Note:** Oracle Sales Online does **not** use interest types to classify customers. Oracle Sales Online uses the Trading Community Architecture (TCA) Customer Classification lookup.

4. Select the Globally Enabled checkbox to indicate that the classification is to be activated throughout the entire implementation. Optionally, select the Enabled by Organization checkbox if the interest type is only to be activated for this specific organization. Enable Globally must be checked if you want to enable for an organization, but in order to disable an interest type at the organization level, you must deselect the Enable by Organization checkbox (you cannot globally disable an interest type without first disabling it at all organization levels).

   You can create an interest type without enabling it at either the global or organization level, however, this interest type will not be available for use. The intent is to be able to create interest types that can be enabled at a later time.

5. **Click Update.**

   Please note, you cannot delete interest types because an interest type may be related to transaction records.

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**Interest Code**

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

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

Use the following procedure to modify and create Interest Codes.

**Navigation**

Administration > Sales > Sales Category > Interest Code
Search for an Interest Code

Steps
1. Select an Interest Type from the drop down list.
2. Click Search.

Create a New Interest Code

Steps
1. Enter the interest code for the Interest Type you want to set up. This is a required field.
2. Enter a description.
3. Select the Enabled checkbox, if applicable.
4. Click Update.

Interest Status

Navigation
Administration > Sales > Sales Category > Interest Status

Search for an Interest Type

Steps
1. Select a Type from the drop down list.
2. Enter a Description.
3. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).
4. Click Search.
Plan Element Mapping

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

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

Plan element mapping is required for using Income Planner.

Navigation
Administration > Sales > Sales Category > Plan Element Mapping

Search for a Plan Element Mapping

Steps
1. Enter the plan element.
2. Select the mapping type from the drop down list.
3. Click Search.

Create a New Plan Element Mapping

Steps
1. Select the first blank Plan Element field and select the plan element you want to map from the drop down list. This is a required field.
2. From the second column, select the Mapping Type from the drop down list. This is a required field.
   * Map quota to primary interest code - if you want to map the plan element to a primary code.
   * Map quota to secondary interest code - if you want to map the plan element to a secondary code.
   * Map quota to interests type - if you want to map the plan element to an interest type.
3. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.
4. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using % as a wildcard, and click Go.

5. Click Update.

Call Center

The Call Center is used for Oracle TeleSales. For more information on TeleSales, please refer to the Oracle TeleSales Implementation Guide and Oracle TeleSales Concepts and Procedures guide.

A list of the available functionality follows:

- Campaign Assignments
- Agent Assignments
- Outcome Assignments
- Web Assistance

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Lead

You can perform the following functions from the Lead Administration section:

- Lead Scorecard
- Lead Rank Mapping
- Lead Import

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Lead Scorecard

The lead scorecard is used to rank leads in Oracle Sales Online. You can manage the lead scorecard from the Administration tab.

While you can create and enable multiple score cards using this procedure, you must select only one scorecard to score your leads. You select the scorecard by setting the system option profile OS: Default Lead Scorecard.

- Find a Scorecard
- Edit a Scorecard
Find a Scorecard

**Navigation**
Administration > Sales > Lead > Lead Scorecard

**Steps**
1. Enter a description.
2. Select a start date by clicking the Calendar icon and choosing a date.
3. Select an end date by clicking the Calendar icon and choosing a date.
4. Click **Search**.

Edit a Scorecard

**Navigation**
Administration > Sales > Lead > Lead Scorecard

**Steps**
1. Find a scorecard or click the scorecard link from the summary table.
2. The Lead Scorecard Details page opens.
3. You can edit the description in the Description field.
4. Edit the End Date by clicking the Calendar icon and selecting another date.
5. Update the Lead Scorecard Rules by selecting the following:
   - Qualifier-this is a required field
   - Score-this is a required field
   - Details-this is an optional field
   - Parameters-this is an optional field
6. Click **Update**.
While you can create and enable multiple score cards using this procedure, you must select only one scorecard to score your leads. You select the scorecard by setting the system option profile OS: Default Lead Scorecard.

Create a Scorecard

**Navigation**
Administration > Sales > Lead > Lead Scorecard

**Steps**
1. Click **Create**.
   The Create Lead Scorecard page opens.
2. Enter a Description.
3. Select a Start Date by clicking the Calendar icon and choosing a date. This is a required field.
4. Optionally, select an End Date.
5. Select the field you wish to evaluate from the Qualifier drop-down list. Here is a list of available fields:
   * Budget Amount
   * Budget Status
   * Campaign Code
   * Contact Role
   * Organization (name)
   * Sales Channel
   * Timeframe
6. In the Score text field, enter the numerical score for this rule. This is a required field.

   **Note:** You cannot make entries in the Details or Parameters fields.

7. Click **Create**.
The Lead Scorecard Details page appears displaying your new qualifier and score.

8. Click Edit to the right of the new row.

The Parameter page appears. The appearance and name of this pages is different for each qualifier.

This is where you map the score you entered previously to the entry a user makes in the lead. For example, you may assign the Budget Status of Approved to the score of 100.

Each qualifier has its own parameter page. For time frame, for example, this page displays a drop-down list with all of the different valid time frames set up in a lookup DECISION_TIMEFRAME. For budget amount, you enter the amount in a text field.

9. Make an entry either from a drop-down, list of values, or a text box, depending on the qualifier.

10. Click Save.

The rule you have created appears on the Lead Scorecard Details page. You are now ready to create another rule.

11. Click Update.

You are now ready to map the scores your scorecard calculates to the desired lead ranking.

---

**Lead Rank Mapping**

Use this procedure to set up lead ranking.

**Navigation**

Administration > Sales > Lead > Lead Rank Mapping

**Prerequisites**

You must create a lead scorecard first and create the rank mapping based on the possible scores that scorecard can assign to leads.

**Steps**

1. The Lead Rank Mapping page appears.
2. Enter the minimum and maximum lead score ranges in the Min. Points and Max. Points fields and assign them 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.

3. Make sure that the Enabled check box is selected for those rank mappings you wish to use.

4. Click Update.

Lead Import

Lead import loads data either from a flat file, using the Oracle SQL Loader, or from another source, using a custom program, into the following tables:

- AS_IMPORT_INTERFACE - Interface table that holds sales lead, customer, address, and contact information to be imported.
- AS_IMP_LINES_INTERFACE - Interface table that holds lead lines to be imported.
- AS_IMP_CNT_ROL_INTERFACE - Interface table that holds contact role information to be imported.
- AS_IMP_CNT_PNT_INTERFACE - Interface table that holds contact role information to be imported.
- AS_IMP_SL_FLEX - Table to store the flex fields values.

Running the Lead Import concurrent program loads the data into:

- TCA (customer) tables
- Oracle Sales tables
- AS_LEAD_IMPORT_ERRORS

For detailed step-by-step information about lead importing, refer to the Oracle Sales Online Implementation Guide.
Opportunity

- Win Probability
- Sales Stage
- Status Code
- Sales Methodology

Find and Modify a Win Probability

Enter a New Probability

Win Probability

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

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

- Find and Modify a Win Probability
- Enter a New Probability

Find and Modify a Win Probability

Use the following procedure to define or modify Win Probabilities.

Navigation
Administration > Sales > Opportunity > Win Probability

Steps
1. Enter the win probability number in the Win Probability field.
2. Optionally, enter the Meaning.
3. Click Search.

Enter a New Probability

Use the following procedure to define or modify Win Probabilities.
Navigation
Administration > Sales > Opportunity > Win Probability

Steps
1. Click in a Win Probability field in a new row. This is a required field.
2. Enter a Value between 0 and 100.
3. Enter or change the information in the Meaning field.
4. Select a Start Date in the From field by clicking the Calendar icon. This is a required field.
5. Optionally, enter an End Date in the To field. If an end date is entered, the Win Probability is disabled after that date.
6. Click the Enabled checkbox to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user’s interface.
7. Click Update to save your work.

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

- Find an Existing Sales Stage
- Enter a New Sales Stage

Find an Existing Sales Stage
Use the following procedure to define or modify Sales Stages.

Navigation
Administration > Sales > Opportunity > Sales Stage

Steps
1. Enter the sales stage name in the Name field.
2. Optionally, enter a Description.
3. Click Search.

Enter a New Sales Stage

Use the following procedure to define or modify Sales Stages.

**Navigation**
Administration > Sales > Opportunity > Sales Stage

**Steps**
1. Click in a Name field in a new row. This is a required field.
2. Enter a description
3. Enter a minimum and a maximum win probability value for this stage in the Min and Max fields. These are required fields.
4. Select a start date in the From field by clicking the Calendar icon and choosing a date. This is a required field.
5. Optionally, select an end date for the To field. If an end date is selected, the Sales Stage will be disabled after that date.
6. Click the Enabled checkbox to enable the Sales Stage. If the Enabled box is not checked, the Sales Stage will not be enabled.
7. Click Update to save your work.

**Status Code**

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

- Search for a Status Code
- Create a New Status Code

**Search for a Status Code**

Use the following procedure to define Opportunity Status.

**Navigation**
Administration > Sales > Opportunity > Status Codes
**Steps**

1. Enter the Status Code.
2. Enter the Meaning.
3. Enter the Description.
4. Click **Search**.

**Create a New Status Code**

Use the following procedure to define Opportunity Status.

**Navigation**

Administration > Sales > Opportunity > Status Codes

**Steps**

1. Click the **Create** button.
2. Enter a Status Code.
3. Enter a Meaning.
4. Enter a Description.
5. Select the Enabled checkbox to activate the opportunity status.
6. Select the Open checkbox to signify whether the opportunity is open or closed. If the checkbox is selected, it means that the opportunity is open. Conversely, if the checkbox is not selected, it means closed and requires a close reason to be entered.
7. Select the Include in Forecast checkbox to include the status in forecasts.
8. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox in the Used For region.
9. The Win Loss Indicator region indicates whether the deal has been won, lost, or neither. If the open flag is unchecked, then the choices are won or lost.
10. Click **Create**.
11. Click **Update** to save your work.
Sales Methodology

Every time a sales representative has a potential opportunity, the sales representative follows a series of steps before closing the sale. This process is referred to as a Sales Methodology and the specific steps are referred to as Sales Stages. Each sales stage creates a set of tasks, mandatory or optional, to be performed by the sales representative in accordance with the Sales Methodology selected. However, a sales rep is not required to select a sales methodology if they choose not to and once a sales methodology is selected for an opportunity it cannot be changed.

The following list is the default Units of Measure (UOM) codes that, if used, the workflow calculates the planned end date. If not used, the planned end date and planned start date are the same as the system date:

- DAY (day)
- WK (week)
- HR (hour)
- MIN (minute)
- MTH (month)
- CN (century)

If you use only these Unit of Measure codes, then you do not need to make any modifications. However, if you use any other Unit of Measure, then you must modify the CHECK_DURATION procedure in the workflow package AS_SALES_METH_WF to make sure that the start and end dates are correctly calculated. You can find this workflow package with the file name ASF/patch/115/sql/asxsmtws.pls (spec) and asxsmtwb.pls (body). Use the example in the file to make your change. If you do not make this modification, then the application does not calculate start and end dates. Instead, it creates a note informing the user of the problem.

Profiles that govern behavior when using Sales Methodologies are: OS: Create Tasks Flag which can be used to disable automatic creation of tasks throughout the sales methodology work flow and OS: Sales Methodology that can be used to set the default sales methodology at the site, application, or user level.

Navigation
Administration > Sales > Opportunity > Sales Methodology

The Sales Methodology Summary page opens.
Steps
1. Click Create.
   The Sales Methodology Create page opens.
2. Enter a name for the sales methodology. This is a required field.
3. Enter a description. This is an optional field.
4. Select Effective From date by clicking the Calendar icon and choosing a date.
   This is a required field.
5. Select Effective To date by clicking the Calendar icon and choosing dates.
6. Enter the Sequence that with which you want the sales stage to follow. This is a required field.
7. Select a Sales Stage from the drop down list. This is a required field.
8. Optionally, select a Task Template Group from the drop down list.
9. Select a Minimum Win Probability from the drop down list. This is a required field.
10. Select a Maximum Win Probability from the drop down list. This is a required field.
11. Click Create.

Please note, if the sales methodology is being used by an opportunity, you can add new sales stages to the methodology but cannot modify the existing sales stages.

Forecast

- Forecast Category
- Forecast Category Mapping
- Budget/Revenue Entry

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Forecast Category

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

You can add or modify forecast category from the Administration tab.
- Modify an Existing Forecast Category
- Add a Forecast Category

### Modify an Existing Forecast Category

**Navigation**
Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

**Steps**
1. Click the Forecast Category Name link.
2. Modify information.
3. Click Update.

### Add a Forecast Category

**Navigation**
Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

**Steps**
1. In the first blank line on the Forecast Category summary table, enter a new Forecast Category Name. This is a required field.
2. Click the Calendar icon and select a Start Date. This is a required field.
3. Click the Calendar icon and select an End Date. This is a required field.
4. Click Update.

### Forecast Category Mapping

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

Use the following procedure to set up Forecast Categories.

- Search for a Forecast Sales Category
Budget/Revenue Entry

- Create a New Sales Category Value

Search for a Forecast Sales Category

**Navigation**
Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

**Steps**
1. Select a Forecast Category Name from the drop down list.
2. Click Search.

Create a New Sales Category Value

**Navigation**
Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

**Steps**
1. In the first blank Interest Type field, select an interest type from the drop down list. This is a required field.
2. Select a Start Date by clicking the Calendar icon. This is a required field.
3. Select an End Date by clicking the Calendar icon. This is a required field.
4. Click Update to save your work.

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

Budget/Revenue Entry

The Budget/Revenue set up is used to govern the Forecast reports, to compare forecast and pipeline amounts to the allocated budget and actual revenue amounts. You can enter data or load data from a file.

- Search for an Existing Budget and Revenue Entry
- Enter New Budget and Revenue Amounts
- Upload Data From a File

**Search for an Existing Budget and Revenue Entry**

**Navigation**
Administration > Sales > Forecast > Budget/Revenue Entry

**Steps**
1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click Apply.
5. The subordinate sales group and salesperson search results are displayed.

**Enter New Budget and Revenue Amounts**

**Navigation**
Administration > Sales > Forecast > Budget/Revenue Entry

**Steps**
1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click Apply.
5. The subordinate sales group and salesperson search results are displayed.
6. Enter the budget amount.
7. Enter actual revenue amount.
8. Select a currency from the drop down list. This is a required field if amount is entered.
9. Click Update to save your work.
10. Click the **Sales Group Name** link to view details and enter data for the next level of subordinates.

### Upload Data From a File

#### Navigation

**Administration > Sales > Forecast > Budget/Revenue Entry**

#### Steps

1. Click the "**Click here to Upload a file to a database**" link.

2. Enter the file name with a directory path and file extension OR click **Browse** to retrieve the file name from a local drive.

   **Note:** This file should be a comma separated text file with each column enclosed in double quotes. Each line in the file should correspond to one row of data.

   - Example file format: "period name", "sales group number", "salesperson number", "budget", "revenue", "currency"
   - Example for sales group: "Q1-01", "40", "(The salesperson number is blank)", "680000", "200000000", "USD"
   - Example for a salesperson: "Sep-01", "50", "12018", "120,000.20", "1,854,200.30", "HKD"

3. Click **Upload**.

   At the completion of the upload process, a message with the log file name is displayed. The log file is generated on the server in a directory located by the Oracle parameter `utl_file_dir` in `init.ora` file.
Customer

Back to Administration Tab Main

**Territory**

**Navigation**
Administration > Sales > Accesses > Territory

**Steps**
1. Enter the territory for which you are searching. This is a required field.
2. Choose to display the Customer, Opportunities, or Leads by selecting the checkbox.
3. Click Go.

**Resource**

**Navigation**
Administration > Sales > Accesses > Resource

**Steps**
1. Enter the resource for which you are searching. This is a required field.
2. Choose to display the Customer, Opportunities, or Leads by selecting the checkbox.
3. Click Go.

**Customer**

**Navigation**
Administration > Sales > Accesses > Customer

**Steps**
1. Enter the full or partial customer/address, using % as a wildcard. This is a required field.
2. Click Go.
3. Select from the search results. Click **Select**.
4. The resources assigned to the customer are displayed.

**Lead**

**Navigation**
Administration > Sales > Accesses > Lead

**Steps**
1. Enter the full or partial lead name, using % as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the lead are displayed.

**Opportunity**

**Navigation**
Administration > Sales > Accesses > Opportunity

**Steps**
1. Enter the full or partial opportunity name, using % as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the opportunity are displayed.
Oracle Sales Online Wireless provides wireless access to your critical sales information through your wireless device such as a mobile phone. You can update your sales forecast, check your appointments for the day, and review contact and opportunity information for your next appointment without using a computer.

See the following topics:

- Managing Organization Information
- Searching for Organizations
- Editing
- Viewing and Editing Sales Team Members
- Managing Persons
- Searching for Persons
- Using Sales Tasks
- Managing Your Opportunities
- Searching for Opportunities
- Viewing and Submitting Forecasts
- Viewing Bins
- Viewing Compensation
- Viewing Notes
- Using Fulfillment
Managing Organization Information

Use the following procedure to view and update organization information.

Steps

1. Select **Organizations** from the Main menu.
2. Search for an organization (see **Searching for Organizations**).
   A list of organizations that match your search criteria appears.
3. Select the desired organization from the list.
   A list of detail information appears.
4. Select a detail from the list to view or edit full details.
5. If you want to see persons related to this organization, then perform the following steps:
   a. Select **Relationships**.
   b. Select **Person**.
      A list of types of relationships appears.
   c. Select the type of relationship.
      A list of persons appears.
   d. Select the person to view or edit details (see **Editing**).
6. If you want to see organizations related to this organization, then perform the following steps:
   a. Select **Relationships**.
   b. Select **Organization**.
      A list of types of relationships appears.
   c. Select the type of relationship.
      A list of organizations appears.
   d. Select the organization to view or edit details (see **Editing**).
7. If you want to see opportunities related to this organization, then perform the following steps:
   a. Select **Opportunities**.
b. Select an opportunity from the list to view details.

c. If you want to edit an opportunity detail, then select it and enter the information.

d. If you want to see or edit the line item for an opportunity, then select **Line Details**.

e. If you want to see sales team members for an opportunity, then select **Sales Team**. (See Viewing and Editing Sales Team Members.)

**Searching for Organizations**

Use the following procedure to search for an organization.

**Steps**

1. On the Organization screen, select **Enter Organization Name**.
2. Enter at least four characters of the organization name.
3. Select **Submit**.
4. Optionally you can narrow the search with a postal code by performing the following steps:
   a. Select **Enter Postal Code**.
   b. Enter the postal code.
   c. Select **Submit**.
5. If you want the search results to include only those organizations that you can access, then select **Search**.
6. If you want to search the whole database, then select **Quick Find**.

A list of organizations appears.

**Editing**

You can edit information that appears on your screen in brackets by selecting the item and entering or deleting characters. If a screen contains the word **Edit** in the menu at the bottom of the screen, selecting Edit takes you to a screen that itemizes the information and shows the editable portion in brackets.
Viewing and Editing Sales Team Members

You can edit phone numbers and e-mail addresses for sales team members related to an opportunity and you can delete sales team members. Use this procedure to view and edit sales team members.

1. In the detail screen for opportunity select Sales Team.
2. A list of existing team members appears.
3. Select an individual team member.
   The team member’s phone number and e-mail address appear.
4. If you are using a telephone and want to call the team member, then select the phone number to dial it.
5. If you want to change the phone number or address, then select it and enter the new information.
6. If you want to delete the team member, then select Delete.

Managing Persons

Use following procedure to view and update information about persons.

Steps

1. Select Person from the Main menu.
2. Search for a person (see Searching for Persons). A list of persons that match your search criteria appears.
3. Select the desired person from the list. Detail information appears.
4. If you are using a telephone and want to call the person, select the phone number to dial.
5. If you want to see persons related to this person, then perform the following steps:
   a. Select Relationships.
   b. Select Person.
      A list of types of relationships appears.
   c. Select the type of relationship.
      A list of persons appears.
d. Select the person to view or edit details.

6. If you want to see organizations related to this person, then perform the following steps:
   a. Select Relationships.
   b. Select Organization.
      A list of types of relationships appears.
   c. Select the type of relationship.
      A list of organizations appears.
   d. Select the organization to view or edit details.

7. If you want to see opportunities related to this person, then perform the following steps:
   a. Select Opportunities.
   b. If you want to see the opportunities where this person is the organization contact, then select Contact Opp.
   c. If you want to see the opportunities where this person is the customer, then select Person Opp.
   d. Select an opportunity from the list to view details.
   e. If you want to edit an opportunity detail, then select it and enter the information (see Editing).
   f. If you want to see or edit the line item for an opportunity, then select Line Details (see Editing).
   g. If you want to see sales team members for an opportunity, then select Sales Team. (See Viewing and Editing Sales Team Members.)

**Searching for Persons**

Use the following procedure to search for persons.

**Steps**

1. On the Person screen, select one of the following choices:
   - Enter Last Name
   - By Organization Name
Using Sales Tasks

Use the following procedure to check your tasks.

**Steps**

1. Select **Tasks** from the Main menu.

2. Select the time period to view from the following choices:
   - Today
   - Tomorrow
   - Any one of the following three days
   - Go To Date: Enter the specific date in the format DD/MM/YY.

   The tasks summary displays all open tasks or the selected time period.

3. If you want to view open tasks that do not have dates, then select **Open Tasks**.

4. If you want to update detail information, then select the detail and change the information (see **Editing**).

5. Save any changes.

Managing Your Opportunities

Use the following procedure to quickly view critical opportunities.

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Steps
1. Select Opportunity from the Main menu.
2. Search for opportunities. (See Searching for Opportunities.)
3. Select the desired opportunity from the list.
   Detail information appears.
4. If you want to update opportunity information, then edit any bracketed field in
   the opportunity detail screen (see Editing).
5. If you want to see or edit the line item for an opportunity, then select Line
   Details (see Editing).
6. If you want to view or edit sales team members for an opportunity, then see
   Viewing and Editing Sales Team Members.

Searching for Opportunities
Use the following procedure to search for opportunities.

Steps
1. On the Opportunity screen, select one of the following choices:
   - Enter Customer Name
   - Enter Opportunity Name
2. Enter at least four characters.
3. Select Submit.
4. If you want the search results to include only those opportunities that you can
   access, then select Search.
5. If you want to search the whole database, then select Quick Find.
A list of opportunities appears.

Viewing and Submitting Forecasts
Use the following procedure to quickly view your forecast or the forecasts of people
who directly report to you and to submit forecasts.
Viewing Bins

**Steps**

1. Select **Forecast** from the Main menu.
   Forecasts for the default forecast category and sales credit type appear.

2. If you want to update and submit your forecast, then perform the following steps:
   a. Select the field to edit.
   b. Enter the new information.
   c. Select **Submit**.
   d. Select **Submit**.

3. If you want to view forecasts for your directs, then perform the following steps:
   a. Select **Directs** from the Forecast menu.
   b. Select the person’s name.
      The person’s forecast appears.
   c. If you want to view the forecast numbers, then select the forecast.

**Viewing Bins**

You set up through Oracle Sales Online the bins you want to see, such as My Forecasts, New Leads, Open Opportunities, and Won Opportunities. Use the following procedure to view your bins.

**Steps**

1. Select **Bins** from the main menu.
   A list of bins appears. The list is based on what is defined in Profile > Home Page > Narrow Bin Preferences. If no Narrow Bins are selected in the user’s profile, then the following message appears instead of the Bins submenu:
   
   No bins have been setup in user profiles. Please update profile in Sales Online.

2. Select the bin to view.
   The detailed bin information appears.
Viewing Compensation

Use the following procedure to view compensation details.

Steps

1. Select Compensation from the main menu.

2. If you want to view your earnings, then perform the following steps:
   a. Select Earning from the compensation menu.
   b. Select Pick Compensation Plan.
   c. Select the compensation plan you want to view.
   d. Select Pick Quota.
      The Quota screen displays all the quotas and the combined total earnings for all quotas for the current period.
   e. Select a quota.
      The Earnings screen displays the earnings for the selected compensation plan and quota for the current period.
   f. If you want to change compensation plan, quota, or period, then select the link and change it.

3. If you want to view your achievements, then perform the following steps:
   a. Select Achievements from the compensation menu.
   b. Select Pick Compensation Plan.
   c. Select the compensation plan you want to view.
   d. Select Pick Quota.
      The Quota screen displays all the quotas for the current period.
   e. Select a quota.
      The Achievement screen displays the achievements for the selected compensation plan and quota for the current period.
   f. If you want to change compensation plan, quota, or period, then select the link and change it.

4. If you want to view your balance, then perform the following steps:
   a. Select Balance from the compensation menu.
b. Select Periods.

c. Select the period you want the balance to cover.

**Viewing Notes**

Use the following procedure to view notes attached to an organization or a person.

**Steps**

1. Find the organization or the person. (See Searching for Organizations and Searching for Persons.)
2. View the details for the selected person or organization.
3. Select Notes.

A list of notes appears.
4. Choose a note to view the detail text. You cannot edit a note.
5. If the note is too long to view all, select More to view the next section of the note.

**Using Fulfillment**

This application uses Oracle Fulfillment to send electronic documents from your wireless device. Use this procedure to e-mail a cover letter with or without additional collateral to a customer or organization.

**Prerequisites**

Collateral pieces must be set up in Oracle Marketing Online before you can attach them to cover letters and send them through your wireless device.

**Steps**

1. Search for the person or organization. (See Searching for Persons or Searching for Organizations.)
2. Select the name to view details.
3. In the Person Detail or Organization Detail screen select **Fulfillment**.

If the person or organization has an e-mail address, then the Select Cover Letter screen appears and you can continue to step 4.
If the person or organization does not have an e-mail address, then the Edit E-mail screen appears. Perform the following steps to add the e-mail address.

a. Enter the e-mail address.

b. Select **Submit**.

c. Select **Save**.

The Select Cover Letter screen appears.

4. Choose the particular cover letter you want to send. This sometimes requires drilling down through several levels to reach the desired cover letter.

The Select an Electronic Collateral screen appears.

5. Optionally, choose a collateral piece to send with the cover letter by performing the following steps:

a. Select [**Enter Collateral Name**].

b. Enter the name or a partial name of the electronic collateral to search.

c. Select **Submit**.

d. Select **Search**.

A list of collateral items that match your search criteria appear.

e. Select the desired collateral.

6. Select **Show Cart**.

The Fulfillment Summary screen displays that a cover letter and collateral piece will be sent and the e-mail address. You can edit the collateral piece choice.

7. If you do not want to send the cover letter and collateral, then select **Cancel**.

8. If you want to send the cover letter and collateral, then select **Submit**.

The cover letter and chosen collateral are e-mailed to the customer or organization.