

# Oracle<sup>®</sup> Sales Online

Concepts and Procedures

Release 11*i*

February 2002

Part No. A96695-01

**ORACLE<sup>®</sup>**

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

**Restricted Rights Notice** Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle Corporation disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark of Oracle Corporation. Other names may be trademarks of their respective owners.

---

---

# Contents

<b>Send Us Your Comments .....</b>	<b>xiii</b>
<b>Preface.....</b>	<b>xv</b>
<b>1 Understanding Oracle Sales Online</b>	
<b>Understanding Trading Community Architecture .....</b>	<b>1-2</b>
<b>Understanding Sales Methodology.....</b>	<b>1-3</b>
<b>Overview of Functionality .....</b>	<b>1-4</b>
<b>New in this Release .....</b>	<b>1-6</b>
<b>Navigating Oracle Sales Online .....</b>	<b>1-9</b>
<b>2 Using Oracle Sales Online</b>	
<b>Getting Started .....</b>	<b>2-2</b>
<b>Managing Account Settings.....</b>	<b>2-2</b>
<b>Changing Your Password .....</b>	<b>2-2</b>
<b>Updating Your Personal Information .....</b>	<b>2-3</b>
<b>Personalization.....</b>	<b>2-3</b>
<b>Navigation Preferences.....</b>	<b>2-3</b>
<b>Display Preferences.....</b>	<b>2-4</b>
<b>Quick Menu .....</b>	<b>2-5</b>
<b>Setting Sales Online Preferences.....</b>	<b>2-5</b>
<b>Setting General Preferences .....</b>	<b>2-6</b>
<b>Setting Home Page Preferences .....</b>	<b>2-7</b>
<b>Setting Activity Preferences .....</b>	<b>2-8</b>
<b>Setting Lead Preferences .....</b>	<b>2-8</b>
<b>Setting Opportunity Preferences .....</b>	<b>2-9</b>
<b>Setting Forecast Preferences .....</b>	<b>2-10</b>
<b>Setting Customer Preferences .....</b>	<b>2-11</b>
<b>Setting Compensation Preferences .....</b>	<b>2-13</b>
<b>Your Home Page.....</b>	<b>2-13</b>

<b>Viewing Bins on the Home Page .....</b>	<b>2-14</b>
<b>Viewing Charts on the Home Page.....</b>	<b>2-15</b>
<b>Using Territory Lookup .....</b>	<b>2-16</b>
<b>Using Resource Lookup.....</b>	<b>2-17</b>
<b>Using Group Lookup .....</b>	<b>2-17</b>
<b>Calendar Tab .....</b>	<b>2-18</b>
<b>Personalizing Task Summary .....</b>	<b>2-18</b>
<b>Using Calendar Views.....</b>	<b>2-19</b>
<b>Creating a Task .....</b>	<b>2-19</b>
<b>Maintaining Task Details .....</b>	<b>2-21</b>
<b>Searching for a Task .....</b>	<b>2-23</b>
<b>Creating a Quick Task.....</b>	<b>2-24</b>
<b>Searching for a Quick Task .....</b>	<b>2-25</b>
<b>Adding an Attachment to a Task.....</b>	<b>2-26</b>
<b>Lead Tab.....</b>	<b>2-27</b>
<b>Personalizing Leads.....</b>	<b>2-28</b>
<b>Creating a Lead.....</b>	<b>2-30</b>
<b>Maintaining a Lead.....</b>	<b>2-32</b>
<b>Searching for a Lead .....</b>	<b>2-34</b>
<b>Assigning a Lead Owner .....</b>	<b>2-35</b>
<b>Ranking a Lead.....</b>	<b>2-36</b>
<b>Qualifying a Lead .....</b>	<b>2-37</b>
<b>Declining a Lead .....</b>	<b>2-38</b>
<b>Attaching a Contact to a Lead .....</b>	<b>2-39</b>
<b>Creating a Note (Lead) .....</b>	<b>2-40</b>
View All Notes.....	2-41
View Note History.....	2-42
<b>Creating a Task (Lead).....</b>	<b>2-42</b>
<b>Creating an Attachment (Lead) .....</b>	<b>2-43</b>
<b>Converting a Lead to an Opportunity.....</b>	<b>2-44</b>
<b>Linking a Lead to an Opportunity.....</b>	<b>2-45</b>
<b>Appending Lead Lines to an Opportunity.....</b>	<b>2-46</b>
<b>Sales Teams (Leads) .....</b>	<b>2-47</b>
<b>Adding an Internal Sales Team Member (Leads) .....</b>	<b>2-47</b>
<b>Adding a Resource Team to a Sales Team (Leads).....</b>	<b>2-49</b>

<b>Adding an External Sales Team Member (Leads)</b> .....	2-50
<b>Lead Reports</b> .....	2-51
<b>Viewing the Lead Import Status Report</b> .....	2-51
<b>Opportunity Tab</b> .....	2-52
<b>Personalizing Opportunity Summary</b> .....	2-53
<b>Creating an Opportunity</b> .....	2-55
<b>Maintaining Opportunity Detail</b> .....	2-57
<b>Searching for an Opportunity</b> .....	2-59
<b>Leads (Opportunity)</b> .....	2-60
<b>Creating a Lead (Opportunity)</b> .....	2-60
<b>Copying an Opportunity</b> .....	2-61
<b>Creating a Quote from an Opportunity</b> .....	2-63
<b>Adding Purchase Items (Opportunity)</b> .....	2-64
<b>Sales Credits (Opportunity)</b> .....	2-65
<b>Maintaining Sales Credits (Opportunity)</b> .....	2-66
<b>Adding a Salesperson to Receive Sales Credits (Opportunity)</b> .....	2-67
<b>Adding a Partner to Receive Sales Credits (Opportunity)</b> .....	2-68
<b>Adding an Existing Contact to an Opportunity</b> .....	2-69
<b>Creating a New Contact (Opportunity)</b> .....	2-70
<b>Notes (Opportunity)</b> .....	2-71
<b>Creating Notes (Opportunity)</b> .....	2-71
<b>Viewing Notes (Opportunity)</b> .....	2-72
<b>Sales Teams (Opportunity)</b> .....	2-74
<b>Adding a Sales Team Member (Opportunity)</b> .....	2-74
<b>Adding a Partner to a Sales Team (Opportunity)</b> .....	2-75
<b>Adding a Resource Team to a Sales Team (Opportunity)</b> .....	2-76
<b>Removing a Sales Team Member (Opportunity)</b> .....	2-78
<b>Tasks (Opportunity)</b> .....	2-79
<b>Creating a Task (Opportunity)</b> .....	2-79
<b>Adding an Attachment to a Task (Opportunity)</b> .....	2-80
<b>Maintaining a Task (Opportunity)</b> .....	2-81
<b>Adding a Classification (Opportunity)</b> .....	2-82
<b>Adding an Existing Competitor (Opportunity)</b> .....	2-83
<b>Creating a New Competitor (Opportunity)</b> .....	2-84
<b>Attachments (Opportunity)</b> .....	2-85

<b>Adding an Attachment (Opportunity)</b> .....	2-85
<b>Viewing an Existing Attachment (Opportunity)</b> .....	2-87
<b>Managing Addresses</b> .....	2-87
<b>Creating a New Address</b> .....	2-87
<b>Editing Address Details</b> .....	2-88
<b>Viewing Address History</b> .....	2-88
<b>Opportunity Reports</b> .....	2-89
<b>Viewing Opportunity Summary Report</b> .....	2-89
<b>Viewing Opportunity Summary Report by Group</b> .....	2-90
<b>Viewing Opportunity Detail Report</b> .....	2-91
<b>Viewing Opportunity Exchange Report</b> .....	2-92
<b>Viewing Opportunity Access Report</b> .....	2-92
<b>Viewing Opportunity Progression Dashboard</b> .....	2-93
<b>Viewing My Reports and Charts</b> .....	2-94
<b>Viewing Opportunity Chart by Close Date</b> .....	2-95
<b>Viewing Opportunity Chart by Status</b> .....	2-95
<b>Viewing Opportunity Chart by Win Probability</b> .....	2-96
<b>Quotes Tab</b> .....	2-97
<b>Searching for a Quote</b> .....	2-97
<b>Forecast Tab</b> .....	2-98
<b>Creating and Submitting Forecasts</b> .....	2-102
<b>Automatically Submitting Worksheets</b> .....	2-102
<b>Viewing Forecast History</b> .....	2-104
<b>Adding an Attachment (Forecast)</b> .....	2-105
<b>Adding a Note (Forecast)</b> .....	2-105
<b>Linking to Compensation</b> .....	2-106
<b>Opportunity Worksheet</b> .....	2-107
<b>Creating Opportunity Level Forecasts Using Opportunity Worksheets</b> .....	2-107
<b>Forecast Threshold Overview</b> .....	2-108
<b>Defining Your Forecast Threshold</b> .....	2-110
<b>Viewing Opportunities Included in the Forecast</b> .....	2-111
<b>Viewing Threshold History</b> .....	2-112
<b>Viewing Subordinate's Threshold Details</b> .....	2-112
<b>Product Category Worksheet</b> .....	2-113
<b>Creating Product Level Forecasts Using Product Category Worksheets</b> .....	2-113

<b>Viewing Product Category History .....</b>	<b>2-114</b>
<b>Viewing Opportunity History .....</b>	<b>2-115</b>
<b>Generate Forecast.....</b>	<b>2-115</b>
<b>Forecast Reports .....</b>	<b>2-116</b>
<b>Viewing Forecast Summary by Product Category.....</b>	<b>2-117</b>
<b>Viewing Forecast Accuracy Report.....</b>	<b>2-118</b>
<b>Viewing Forecast Progression Report.....</b>	<b>2-119</b>
<b>Viewing Forecast Comparison Report.....</b>	<b>2-120</b>
<b>Viewing Forecast History Report.....</b>	<b>2-121</b>
<b>Viewing Forecast to Pipeline Summary Report.....</b>	<b>2-122</b>
<b>Viewing Forecast Summary Report.....</b>	<b>2-123</b>
<b>Creating a Report (Forecast).....</b>	<b>2-124</b>
<b>Viewing Forecast History (Self) Chart.....</b>	<b>2-125</b>
<b>Viewing Forecast History (Subordinates) Chart.....</b>	<b>2-126</b>
<b>Customer Tab.....</b>	<b>2-126</b>
<b>Organization Subtab.....</b>	<b>2-127</b>
<b>Personalizing Organization Summary .....</b>	<b>2-128</b>
<b>Creating a New Organization.....</b>	<b>2-128</b>
<b>Maintaining Organization Details .....</b>	<b>2-132</b>
<b>Create an Address .....</b>	<b>2-134</b>
<b>Searching for an Organization .....</b>	<b>2-135</b>
<b>Adding Classifications .....</b>	<b>2-136</b>
<b>Creating and Maintaining Relationships (Organization).....</b>	<b>2-137</b>
<b>Creating an Organization to Organization Relationship.....</b>	<b>2-137</b>
<b>Creating an Organization to Person Relationship .....</b>	<b>2-139</b>
<b>Creating a Customer.....</b>	<b>2-140</b>
<b>Sales Teams (Organization) .....</b>	<b>2-141</b>
<b>Adding a Sales Team Member (Organization).....</b>	<b>2-141</b>
<b>Adding a Partner to a Sales Team (Organization) .....</b>	<b>2-142</b>
<b>Adding a Resource Team to a Sales Team (Organization) .....</b>	<b>2-144</b>
<b>Removing a Sales Team Member (Organization).....</b>	<b>2-145</b>
<b>Maintaining Lead Details (Organization).....</b>	<b>2-146</b>
<b>Creating and Maintaining Opportunities (Organization).....</b>	<b>2-148</b>
<b>Maintaining Quote Details.....</b>	<b>2-150</b>
<b>Interactions (Organization).....</b>	<b>2-151</b>

<b>Viewing Interactions (Organization)</b> .....	2-151
<b>Accounts</b> .....	2-152
<b>Creating Accounts (Organization or Person)</b> .....	2-152
<b>Maintaining Account Details (Organization or Person)</b> .....	2-154
<b>Viewing Account Sites (Organization or Person)</b> .....	2-156
<b>Viewing Account Roles (Organization or Person)</b> .....	2-157
<b>Viewing Account Relationships (Organization or Person)</b> .....	2-159
<b>360 Degree View (Organization)</b> .....	2-160
<b>Viewing 360 Degree View (Organization or Person)</b> .....	2-160
<b>Notes (Organization)</b> .....	2-162
<b>Creating a Note (Organization)</b> .....	2-162
<b>Viewing a Note (Organization)</b> .....	2-163
<b>Tasks (Organization)</b> .....	2-165
<b>Creating a Task (Organization)</b> .....	2-165
<b>Adding an Attachment to a Task (Organization)</b> .....	2-167
<b>Attachments (Organization)</b> .....	2-168
<b>Adding an Attachment (Organization)</b> .....	2-168
<b>Viewing an Existing Attachment (Organization)</b> .....	2-169
<b>Person Subtab</b> .....	2-169
<b>Person Summary</b> .....	2-170
<b>Personalizing Person Summary</b> .....	2-171
<b>Updating Person Summary Table</b> .....	2-171
<b>Creating a Person</b> .....	2-172
<b>Maintaining Person Details</b> .....	2-175
<b>Adding Classifications</b> .....	2-178
<b>Searching for a Person</b> .....	2-178
<b>Sending Collateral (Person)</b> .....	2-180
<b>Creating and Maintaining Relationships (Person)</b> .....	2-180
<b>Creating a Person to Organization Relationship</b> .....	2-181
<b>Creating a Person to Person Relationship</b> .....	2-183
<b>Sales Teams (Person)</b> .....	2-185
<b>Adding a Sales Team Member (Person)</b> .....	2-185
<b>Adding a Partner to a Sales Team (Person)</b> .....	2-187
<b>Adding a Resource Team to a Sales Team (Person)</b> .....	2-188
<b>Removing a Sales Team Member (Person)</b> .....	2-189

<b>Leads (Person)</b> .....	2-190
<b>Maintaining Lead Details (Person)</b> .....	2-190
<b>Creating Opportunities (Person)</b> .....	2-193
<b>Maintaining Quote Details</b> .....	2-194
<b>Interactions (Person)</b> .....	2-195
<b>Viewing Interactions (Person)</b> .....	2-195
<b>Accounts (Person or Organization)</b> .....	2-196
<b>360 Degree View (Person)</b> .....	2-197
<b>Viewing 360 Degrees (Person)</b> .....	2-197
<b>Notes (Person)</b> .....	2-198
<b>Creating a Note (Person)</b> .....	2-199
<b>Viewing a Note (Person)</b> .....	2-200
<b>Tasks (Person)</b> .....	2-201
<b>Creating a Task (Person)</b> .....	2-202
<b>Maintaining Task Details (Person)</b> .....	2-203
<b>Attachments (Person)</b> .....	2-205
<b>Adding an Attachment (Person)</b> .....	2-205
<b>Viewing an Existing Attachment (Person)</b> .....	2-206
<b>Contacts Subtab</b> .....	2-206
<b>Personalize Contact Summary</b> .....	2-207
<b>Creating a Contact</b> .....	2-207
<b>Searching for a Contact</b> .....	2-209
<b>Maintaining Contact Details</b> .....	2-210
<b>Adding Classifications</b> .....	2-211
<b>Managing Relationship Notes</b> .....	2-211
Searching for a Relationship .....	2-212
<b>Creating a Relationship Task</b> .....	2-213
<b>Managing Relationship Attachments</b> .....	2-214
Searching for a Relationship Attachment .....	2-215
<b>Managing Relationship Interactions</b> .....	2-216
<b>Sending Collateral from the Contact Summary Table</b> .....	2-217
<b>Contact Lists Subtab</b> .....	2-217
<b>Creating a Contact List Using Filters</b> .....	2-218
<b>Creating a Contact List by Manually Adding Contacts</b> .....	2-219
<b>Saving a Contact List</b> .....	2-220

<b>Downloading a Contact List .....</b>	<b>2-220</b>
<b>Personalizing the Summary Table Display .....</b>	<b>2-220</b>
<b>Adding Additional Filters to a Contact List.....</b>	<b>2-221</b>
<b>Viewing List Filters .....</b>	<b>2-222</b>
<b>Manually Add a Contact to a List .....</b>	<b>2-222</b>
<b>Removing a Contact from a List.....</b>	<b>2-223</b>
<b>Removing a List.....</b>	<b>2-223</b>
<b>Customer Reports .....</b>	<b>2-223</b>
<b>Viewing the Customer Classification Report.....</b>	<b>2-223</b>
<b>Viewing the Task Classification Report .....</b>	<b>2-224</b>
<b>Partner Tab .....</b>	<b>2-225</b>
<b>Create a Partner .....</b>	<b>2-225</b>
<b>Create a Person/Contact .....</b>	<b>2-230</b>
<b>Compensation Tab .....</b>	<b>2-233</b>
<b>Fulfillment Tab.....</b>	<b>2-234</b>
<b>Sending Collateral.....</b>	<b>2-234</b>
<b>Administration Tab.....</b>	<b>2-235</b>
<b>Customer Administration .....</b>	<b>2-236</b>
<b>Classifications.....</b>	<b>2-236</b>
<b>Relationships .....</b>	<b>2-240</b>
<b>Globalization .....</b>	<b>2-242</b>
<b>Calendar Type.....</b>	<b>2-243</b>
<b>Accounting Calendar.....</b>	<b>2-243</b>
Search for an Existing Accounting Calendar .....	2-244
Create a New Accounting Calendar .....	2-244
<b>Type Mapping.....</b>	<b>2-244</b>
Create a New Type Mapping.....	2-245
<b>Period Rate .....</b>	<b>2-245</b>
<b>GL Daily Rate .....</b>	<b>2-246</b>
<b>Transaction Calendar.....</b>	<b>2-247</b>
<b>Menu Administration .....</b>	<b>2-247</b>
Resequence Side Panel Navigation Menus.....	2-248
Change the Menu Name .....	2-248
Create a Parent Menu.....	2-248
Create Your Own Menu.....	2-249

<b>Home Page</b> .....	2-249
<b>Setting Up Home Page Bins Accessibility</b> .....	2-250
<b>External Tools</b> .....	2-250
Setting Up Links to External Sites.....	2-250
Setting Up Links to ERP Applications.....	2-251
<b>Home Page Message</b> .....	2-252
<b>Sales Category</b> .....	2-252
<b>Interest Types</b> .....	2-252
Search for an Interest Type.....	2-253
Create a New Interest Type.....	2-253
<b>Interest Code</b> .....	2-254
Search for an Interest Code .....	2-254
Create a New Interest Code .....	2-255
<b>Interest Status</b> .....	2-255
Search for an Interest Type.....	2-255
<b>Plan Element Mapping</b> .....	2-255
Search for a Plan Element Mapping .....	2-256
Create a New Plan Element Mapping.....	2-256
<b>Call Center</b> .....	2-257
<b>Lead</b> .....	2-257
<b>Lead Scorecard</b> .....	2-257
Find a Scorecard.....	2-257
Edit a Scorecard .....	2-258
Create a Scorecard .....	2-258
<b>Lead Rank Mapping</b> .....	2-260
<b>Lead Import</b> .....	2-261
<b>Opportunity</b> .....	2-261
<b>Win Probability</b> .....	2-262
Find and Modify a Win Probability.....	2-262
Enter a New Probability .....	2-262
<b>Sales Stage</b> .....	2-263
Find an Existing Sales Stage.....	2-263
Enter a New Sales Stage.....	2-263
<b>Status Code</b> .....	2-264
Search for a Status Code .....	2-264

Create a New Status Code .....	2-264
<b>Sales Methodology</b> .....	2-265
<b>Forecast</b> .....	2-267
<b>Forecast Category</b> .....	2-267
Modify an Existing Forecast Category .....	2-268
Add a Forecast Category .....	2-268
<b>Forecast Category Mapping</b> .....	2-268
Search for a Forecast Sales Category .....	2-269
Create a New Sales Category Value .....	2-269
<b>Budget/Revenue Entry</b> .....	2-269
Search for an Existing Budget and Revenue Entry .....	2-270
Enter New Budget and Revenue Amounts .....	2-270
Upload Data From a File .....	2-271
<b>Accesses</b> .....	2-271
<b>Territory</b> .....	2-272
<b>Resource</b> .....	2-272
<b>Customer</b> .....	2-272
<b>Lead</b> .....	2-273
<b>Opportunity</b> .....	2-273

## **A Oracle Sales Online Wireless**

<b>Managing Organization Information</b> .....	A-2
<b>Searching for Organizations</b> .....	A-3
<b>Editing</b> .....	A-3
<b>Viewing and Editing Sales Team Members</b> .....	A-4
<b>Managing Persons</b> .....	A-4
<b>Searching for Persons</b> .....	A-5
<b>Using Sales Tasks</b> .....	A-6
<b>Managing Your Opportunities</b> .....	A-6
<b>Searching for Opportunities</b> .....	A-7
<b>Viewing and Submitting Forecasts</b> .....	A-7
<b>Viewing Bins</b> .....	A-8
<b>Viewing Compensation</b> .....	A-9
<b>Viewing Notes</b> .....	A-10
<b>Using Fulfillment</b> .....	A-10

---

---

# Send Us Your Comments

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

**Part No. A96695-01**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via the postal service.

Oracle Corporation  
CRM Content Development Manager  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

-----  
-----  
-----

If you have problems with the software, please contact your local Oracle Support Services.



---

---

# Preface

This Concepts and Procedures Guide provides information and instructions to help you work effectively with Oracle Sales Online, Release 2.1.1.

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.

### **Oracle Sales Online Technical Reference Manual**

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](#)
- [Navigation for 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](#)

- [Administration 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

- **Party Site:** links a party with a location, indicating that party's usage of the location
- **Organization Person:** a person in the context of an organization, modeled as a relationship between an organization and a person
- **Party Relationship:** a binary relationship between two parties such as a partnership. A party relationship is optionally a party itself, meaning certain party relationships (such as Organizations and People) can enter into relationships themselves.
- **Contact Point:** a means of contacting a party, for example, a phone number, email address, or fax number
- **Customer Account:** models a customer relationship between the company deploying Oracle Applications and a party
- **Customer Account Site:** a party site that is used within the context of a customer account, for example, for billing or shipping purposes
- **Customer Account Contacts:** a party contact that is used within the context of a customer account

[Return to Oracle Sales Online Main Menu](#)

## 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:

<b>Level</b>	<b>How it works</b>
--------------	---------------------

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

Managers can create their own views of their sales representatives' forecasted opportunities and can 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.

[Return to Oracle Sales Online Main Menu](#)

## **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 chose 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.

[Return to Oracle Sales Online Main Menu](#)

## 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:

Item	How it works
Tab	Tabs are the major navigation tool you can use to quickly go to another area of functionality.
Subtab	Subtabs are used to indicate further functionality under a tab.
Link or Hyperlink	Links are used to take you to another level of detail under the subtab.
Asterisks	Fields marked with an asterisk are mandatory to perform that particular function.
Page with Star	New items on a summary table are indicated by a page with a star next to it.
Round Dot	Indicates record was updated by another user.
Erase button	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.
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 <b>Go</b> . 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.

---

---

# 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](#)

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](#)

## 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.

See also:

- [Managing Account Settings](#)
- [Personalization](#)
- [Setting Sales Online Preferences](#)

[Return to Oracle Sales Online Main Menu](#)

## Managing Account Settings

Use the Account Settings section to manage the following information:

- [Changing Your Password](#)
- [Updating Your Personal Information](#)

[Return to Oracle Sales Online Main Menu](#)

## Changing Your Password

### Navigation

Profile > Account Setting > 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.

[Return to Oracle Sales Online Main Menu](#)

## Updating Your Personal Information

### Navigation

Profile > Account Setting > Personal Information

[Return to Oracle Sales Online Main Menu](#)

## 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](#)

[Return to Oracle Sales Online Main Menu](#)

## Navigation Preferences

### Navigation

Profile > Personalization > Navigation Preferences

### Switching Current Responsibility

To perform other functions with a different responsibility, change the responsibility level under which you have logged in by selecting another responsibility from the drop down list.

### Setting Default Responsibility

Select the "Select" radio button and choose from the drop down list to designate the default responsibility for the user.

[Return to Oracle Sales Online Main Menu](#)

## 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.

### Search Display

The search display lets you indicate how you want Quick Find Results displayed. Your choices are:

- Go to record detail when there is one result
- Always show results page

[Return to Oracle Sales Online Main Menu](#)

## Quick Menu

### Navigation

Profile > Personalization > Quick Menu

### Add/Delete Page in Your Favorite List

Select Favorite Menus from the Available Menu column by clicking the right arrow. To add all Available Menu items to the Favorite Menu column, click the right double arrow. To delete items, click the left arrows.

[Return to Oracle Sales Online Main Menu](#)

## 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 Forecast Preferences](#)
- [Setting Customer Preferences](#)
- [Setting Compensation Preferences](#)

[Return to Oracle Sales Online Main Menu](#)

---

---

**Note:** If a user has set up a profile preference and that profile is changed at a later time, the user will see a warning message. This message will indicate that the user will need to go to the Profile page and select a valid option for that preference.

---

---

## 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 Start Page:** Select the page that you want to appear when you log in to the application, if different from the Home page.

**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.

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 > Home Page

### 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.

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](#)

## Setting Lead 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.

**Default Response Channel:** Select a default response channel that will be used when a lead is created. Examples include mail, fax, or phone.

**Default Budget Status:** Select the default budget status for new leads.

**Default Timeframe:** Select the default timeframe.

**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 your 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.

Click **Update** to save your changes.

[Back to Setting Sales Online Preferences](#)

## Setting Forecast 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.

**Default Forecast Category:**

**Default Sales Credit Type:**

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

**Opportunity Worksheet Threshold Amount:**

**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. Selecting 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

### 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 Person to Organization Relationship:** Choose from the drop down list. This is the default person to organization relationship that will be used when creating a new relationship.

**Default Organization to Organization Relationship:**

**Default Person to 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](#)

## 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](#)

## 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**.
- **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:

- **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](#)

## Viewing Charts on the Home Page

You can display charts on the home page.

### 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**.
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.

[Return to Calendar Tab](#)

## 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.

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

Field	Required Field	Description
Name	No	Displays the related item name.

2. Click **Create**.

[Return to Calendar Tab](#)

## 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.
  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.

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

Field	Required Field	Description
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 <b>Go</b> .
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 <b>Go</b> .
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](#)

## Searching for a Task

### Navigation

Calendar

### 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:

### Navigation

Calendar

### Prerequisite

None

### Steps

Search for quick tasks 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.

[Return to Calendar Tab](#)

## 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.
2. Select the task by clicking the task link.
3. Click the **Attachments** link.
4. Click **Add**.

The **Add Attachment** page opens.
5. Enter a description, and click **Text**, **File**, or **URL**.

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

6. Click **Create**.

[Return to Calendar Tab](#)

## 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.
- **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](#)
- [Creating a Task](#)
- [Creating an Attachment](#)
- [Converting a Lead to an Opportunity](#)
- [Linking a Lead to an Opportunity](#)
- [Appending Lead Lines to an Opportunity](#)
- [Adding an Internal Sales Team Member](#)
- [Adding a Resource Team to a Sales Team](#)
- [Adding an External Sales Team Member](#)
- [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 Lead Search page opens.
2. Change, add, or remove search parameters.  
Search fields for lead information include:
  - Lead Name

- Lead Number
- Project
- Assigned Date Range
- Creation Date Range
- Status
- Lead Rank
- Channel
- Response Channel
- Time Frame
- Budget Status
- Source Name
- Offer
- Budget Amount
- Close Reason
- Decline Reason
- Urgent
- Accepted
- Qualified
- Context Value

Search fields for customer information include:

- Customer
- Customer Category
- Country

Search fields for sales team information include:

- Sales Group
- Salesperson
- Partner Name
- Owner

- Include Account Manager Privilege
- 3. Change, add, or remove display and sort options.
- 4. Enter a Search Name.
- 5. Optionally, select the "Use as Summary Page Default" check box.
- 6. 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 set to "Yes" then the address is mandatory for creating a person. It is then required that you go to the "Create Person" page where you must enter the address while creating the person. In this case there are no empty rows in the contact table.
- If set to "No" then you can create without the address. You are not required to go to the "Create Person" page. Instead, you can create a new person and a contact by entering data in empty rows in the 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. Use quote marks to find exact matches. For example, "at&t universal" as opposed to at&t universal.
  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.

Field	Required Field	Description
Lead Name	Yes	Lead name

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

The following table describes the field in the Purchase Items region of Lead Details.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Remove	No	Select the remove check box to remove the purchase item.

Field	Required Field	Description
Product Category	Yes	This field is required if you are entering purchase items.
Item ID	No	This field is determined by the product category.
Unit of Measure	No	View the unit of measure.
Quantity	No	Enter the quantity.
Budget Amount	No	Required if a purchase item is entered.
Source Name	No	Enter the full or partial name and click <b>Go</b> .
Offer Code	No	Enter offer code

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
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.

4. Click **Update**.

[Return to Leads Tab](#)

## 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*.

[Return to Leads Tab](#)

## 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**.
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.
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.
9. Click **Update**.

[Return to Leads Tab](#)

## 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.  
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](#)

## 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 **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**:
  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. Click **Create Opportunity**.

[Return to Leads Tab](#)

## 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.

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.

[Return to Leads Tab](#)

## 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.

[Return to Leads Tab](#)

## 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.

[Return to Leads Tab](#)

## 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](#)

[Return to Leads Tab](#)

## 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 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](#)
- [Maintaining Opportunity Detail](#)
- [Searching for an Opportunity](#)
- [Creating a Lead](#)
- [Copying an Opportunity](#)
- [Creating a Quote from an Opportunity](#)

- [Viewing Win/Loss](#)
- [Adding Purchase Items](#)
- [Sales Credits](#)
- [Adding an Existing Contact to an Opportunity](#)
- [Creating a New Contact](#)
- [Notes](#)
- [Sales Teams](#)
- [Tasks](#)
- [Adding a Classification](#)
- [Adding an Existing Competitor](#)
- [Creating a New Competitor](#)
- [Attachments](#)
- [Managing Addresses](#)
- [Opportunity Reports](#)

[Return to Oracle Sales Online Main Menu](#)

## 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.
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](#)

# 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:

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**
  - Unit of Measure (UOM): enter a unit of measure
  - Quantity: enter a quantity
  - Campaign: enter a partial campaign name and click **Go**
  - Number of Purchase Lines: enter the number of purchase lines you would like for rolling opportunities
4. You can select Forecast Date Intervals for rolling opportunities by selecting a Start Date and entering the Number of Days in the appropriate fields.

5. Click **Add** to create multiple purchase lines with forecast dates in the above mentioned intervals.
6. Click **Update** to save any changes.

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

[Return to Opportunity Tab](#)

## 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.

[Return to Opportunity Tab](#)

## Leads (Opportunity)

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

[Return to Opportunity Tab](#)

## 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.
  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

### 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](#)
- [Adding a Salesperson to Receive Sales Credits](#)
- [Adding a Partner to Receive Sales Credits](#)

[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.  
The Opportunity Search page opens.
  2. Enter search filters and display options.
3. Click **Search**.  
The Opportunity Detail page opens.
4. From the Purchase Items table, under the Amount column, click **Split**.
5. Choose "[Add a Salesperson](#)" or "[Add a Partner](#)".

6. Enter the credit amount or percentage.
7. Click **Update**.

[Return to Opportunity Tab](#)

## 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.
  3. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. From the Purchase Items table, under the Amount column, click **Split**.
5. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
6. Select an employee by clicking the employee name link.

To search for an employee outside your business group, select the business group from the drop down list, click **Go**.

7. Enter credit amount (forecast or other).

[Return to Opportunity Tab](#)

## Adding a Partner to Receive Sales Credits (Opportunity)

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.
  3. Click **Search**.  
The Opportunity Detail page opens.
3. From the Purchase Items table, under the Amount column, click **Split**.
4. In the Add a Partner field, enter the name of the partner, and click **Go**.
5. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a "sales" partner.

6. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop down list and click **Update**.

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

[Return to Opportunity Tab](#)

## 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**.
3. Select an opportunity by clicking the opportunity link.

The Opportunity Detail page opens.
4. Click the **Contacts** link.
5. 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.

6. 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.

[Return to Opportunity Tab](#)

## 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](#)
- [Viewing Notes](#)

[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**.
8. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
9. To view all notes in a printer-friendly format, click **All Notes**.

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

[Return to Notes \(Opportunity\) Main](#)

## Sales Teams (Opportunity)

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

- [Adding a Sales Team Member](#)
- [Adding a Partner to a Sales Team](#)
- [Adding a Resource Team to a Sales Team](#)
- [Removing a Sales Team Member](#)

[Return to Opportunity Tab](#)

---

---

**Note:** A number may be listed next to an employee name while using the Sales Team functionality. This number is the PERSON\_ID from the JTF\_RS\_SALESREPS table. It is only generated for an Employee.

This is a system generated unique identifier used by other integrated applications. It is called in various components for assigning sales credit and territory generation reporting.

---

---

## 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:

## 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 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 exist 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](#)
- [Adding an Attachment to a Task](#)
- [Maintaining a Task](#)

[Return to Opportunity Tab](#)

## 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.

## 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**.

[Return to Tasks \(Opportunity\) Main](#)

## 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.

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.

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 Customer tab and create your company as an internal organization. Refer to the [Create a New Organization](#) section for step-by-step instructions.

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

2. Create the competitor as an organization.

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

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

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](#)
- [Viewing an Existing Attachment](#)

[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.

[Return to Managing Addresses Main](#)

## 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.

[Return to Opportunity Tab](#)

## 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.

**Navigation**

Opportunity > Reports

**Prerequisites**

None

**Steps**

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](#)

## Viewing Opportunity Progression Dashboard

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

**Navigation**

Opportunity > Reports

**Prerequisites**

None

## 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.

[Return to Oracle Sales Online Main Menu](#)

## 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 Forecasts](#)
- [Viewing Forecast History](#)
- [Adding an Attachment](#)

- [Adding a Note](#)
- [Linking to Compensation](#)
- [Opportunity Worksheet](#)
- [Creating Opportunity Level Forecast Using Opportunity Worksheets](#)
- [Using Forecast Thresholds](#)
- [Product Category Worksheet](#)
- [Creating Product Level Forecast Using Product Category Worksheets](#)
- [Viewing Product Category History](#)
- [Viewing Opportunity History](#)
- [Generate Forecast](#)
- [Forecast Reports](#)

Forecasting is performed at two levels; product category and opportunity. The following table describes how the forecasting levels work.

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

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.

<b>View</b>	<b>How it works</b>
-------------	---------------------

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 unit of currency (e.g., in US dollars, rounded down to the whole dollar).

[Return to Oracle Sales Online Main Menu](#)

## 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.

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

<b>Auto Submit Worksheets Profile</b>	<b>Default Worksheet Values Profile</b>	<b>How it works</b>
Product Category	Pipeline	The main forecast is submitted. The product category worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.
Both	0	The main forecast is submitted. The opportunity and product category worksheets are submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Both	Pipeline	The main forecast is submitted. The opportunity and product category worksheets are submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.

[Return to Forecast Tab](#)

## 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.

[Return to Forecast Tab](#)

## Adding an Attachment (Forecast)

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

### 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.

[Return to Forecast Tab](#)

## Forecast Threshold Overview

Before creating opportunity worksheets you can set up a forecast threshold to simplify your data input. A forecast threshold is a currency amount defined in your profile preferences that establishes a value, and any forecast equal to or below that value will be rolled up into a lump sum. This saves sales reps and managers valuable time entering forecast data for opportunities below a certain value, the forecast threshold. This applies to opportunity worksheets only and this feature is optional.

A basic example:

Sales Representative "A" has set her forecast threshold at \$4,000.00 and forecasted five opportunities with the following amounts:

Opportunity #1 = \$10,000.00

Opportunity #2 = \$ 5,000.00

Opportunity #3 = \$ 4,000.00

Opportunity #4 = \$ 2,000.00

Opportunity #5 = \$ 1,000.00

Since the threshold amount is set to \$4,000.00, the three opportunity amounts equal to or lesser than the threshold amount (3, 4, and 5) are rolled up and displayed on the worksheet in a lump sum. The opportunity worksheet would display the following three rows:

Opportunity #1 = \$10,000.00

Opportunity #2 = \$ 5,000.00

Opportunity #3 = \$ 7,000.00 (opportunities equal to or below the threshold combined 3, 4, and 5)

## Prerequisites

If you choose to use this feature, set the following profiles:

- Set by the user:
  - "OSO: Opportunity Worksheet Threshold Amount" to set the threshold amount.
    1. Click the **Profile** icon.
    2. Click the **Forecast** link.
    3. Enter the amount you want to include as your forecast threshold in the "Opportunity Worksheet Threshold Amount" field.
    4. Click **Update**.
- Set by the System Administrator (optional):
  - "OSO: Store Opportunities After Aggregation Due to Forecast Threshold" to specify whether the individual lines of the threshold should be stored in opportunity worksheet lines. You will only need to update this profile if you decide not to store the opportunities. This profile does not have to be set up if

the user determines that they want to store the opportunities. The default is "Yes".

This profile option must be set up by a system administrator. Please refer to the *Oracle Sales Online Implementation Guide, Release Notes for 11.5.7* for further instruction.

See also:

- [Defining Your Forecast Threshold](#)
- [Viewing Opportunities Included in the Forecast](#)
- [Viewing Threshold History](#)
- [Viewing Subordinate's Threshold Details](#)

[Return to Forecast Tab](#)

## Defining Your Forecast Threshold

If you choose to use this feature, define the forecast threshold by setting the appropriate profiles.

- Set the profile "OSO: Store Opportunities After Aggregation Due to Forecast Threshold" to specify whether the individual lines of the threshold should be stored in opportunity worksheet lines. You only need to update this profile if you decide not to store the opportunities. This profile does not have to be changed if the user wants to store the opportunities. The default is "Yes".

### Steps

1. Click the **Profile** icon.
2. Click the **Forecast** link.
3. Enter the amount you want to include as your forecast threshold in the "Opportunity Worksheet Threshold Amount" field.
  - A positive value in this field means threshold is turned on and will sum all rows with this amount or lower into one summary line.
  - A null value assumes the feature is not being used and the application works as is, without a threshold set.

- A zero value is treated as a threshold value and will sum all rows with a zero or negative value into one summary line.
4. Click **Update**.

The result of setting a forecast threshold is that all opportunities that fall within a forecast category, for a forecast period, for a specific credit type within the threshold are summarized in one line on the opportunity worksheet.

[Return to Forecast Tab](#)

## Viewing Opportunities Included in the Forecast

You can view all the opportunities summarized in an opportunity line by clicking the opportunity link. This link takes you to the details of the opportunities that are equal to or below the forecast threshold that you have established.

### Prerequisites

This link is active only if the profile "OSO: Store Opportunities After Aggregation Due to Forecast Threshold" is set to "Yes", the default. If you are not using this feature, the link is turned off. However, you can still forecast for this aggregate line.

### Navigation

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View

### Steps

Click the opportunities below the threshold number link in the opportunity column of the threshold line.

---

---

**Note:** If you save and submit an opportunity worksheet using a threshold value, and then change the threshold value, the threshold row is flagged with an indicator and the message "The Threshold Amount has changed since the last submission" appears.

---

---

[Return to Forecast Tab](#)

## Viewing Threshold History

You can view the history of submitted threshold rows.

### Prerequisites

A forecast threshold and history must exist.

### Navigation

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View

### Steps

Click the History View button on the threshold line in the opportunity worksheet to display the history of submitted threshold rows.

[Return to Forecast Tab](#)

## Viewing Subordinate's Threshold Details

If you are a manager, you can view your subordinates forecast threshold details.

### Prerequisites

You must be logged in as a manager.

### Navigation

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View Subordinates Submitted Threshold Lines

### Steps

Click the View Subordinates Submitted Threshold Lines link at the bottom of the page.

You will see a read-only page with opportunity details for your subordinates.

[Return to Forecast Tab](#)

## 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](#)

[Return to Forecast Tab](#)

## 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

This report provides the historical accuracy of the forecast values for the specified period and sales group/person.

### 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

This report provides the progression of submitted forecasts between the specified dates and for the sales group/person.

### 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**.

Please note, if you have selected a forecast period in the future, the Forecast Progression Report will use the last submitted values. For example, if today is January 1, 2002 and you want a Forecast Progression Report for January 1, 2002 to January 31, 2002, your last submitted forecast values will be used to generate the 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.

[Return to Forecast Reports Main](#)

## Viewing Forecast to Pipeline Summary Report

This report provides management a way to compare the current period pipeline with a comparison period and generate conversion ratios. Please note, this report uses submitted pipeline numbers.

### 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.

[Return to Forecast Reports Main](#)

## Viewing Forecast Summary Report

This report provides management with the summary of the current forecast in comparison to a particular base period.

### Navigation

Forecast > Reports > Forecast Summary Report

### Prerequisites

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

The following criteria provides the basis for this report:

Variance from FY Comparison Period Actuals equals YTD Forecast minus FY of the Comparison Period Actuals. Therefore, Variance From FY-01-01 Actuals should be YTD Forecast minus FY-01-01 Actuals = 3999 - 6666 = -2667.

### 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.

[Return to Forecast Reports Main](#)

## 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.

[Return to Forecast Reports Main](#)

## Viewing Forecast History (Self) Chart

This chart gives the ability to graph the submitted forecast numbers for a sales person.

**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

This chart gives the sales manager the ability to graph the submitted forecast numbers for his/her subordinate sales reps or groups.

### 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

Use the Customer tab to create and maintain Organizations, People, Contacts, and Lists by clicking the related subtab.

By default, the Customer tab opens to the Organization Summary page. From the Customer tab, you can use the following subtabs:

- [Organization](#)
- [Person](#)
- [Contact](#)
- [Contact List](#)

- [Reports](#)

[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](#)
- [Adding Classifications](#)
- [Creating and Maintaining Relationships](#)
- [Sales Teams](#)
- [Maintaining Lead Details](#)
- [Creating and Maintaining Opportunities](#)
- [Maintaining Quote Details](#)
- [Interactions](#)
- [Accounts](#)
- [360 Degree View](#)
- [Notes](#)
- [Tasks](#)
- [Attachments](#)

[Return to Customer Tab Main](#)

## Personalizing Organization Summary

### Navigation

Customer > Organization

### Prerequisites

None

### Steps

Follow these steps to personalize the organization summary page:

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.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Organization	Yes	The organization name is a required field.
Organization Name Pronunciation	No	You can enter the organization name pronunciation.
Tax ID	No	Enter the tax identification code.
Email Addressbook	No	Enter the email address here or click the email address book to select another address.
Customer Category	No	Select customer category from the drop down list.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Web Site Address Book	No	Enter the organization's web site or click the web address book icon to select another party web address to display.
External/Internal	No	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
Alias	No	Enter an organization alias.
Phonebook	No	Click the phonebook link to select another party phone number to display.
Business Line	No	Enter a business line, if applicable.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.

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

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

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.

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

The following table describes Organization Relationship fields in Create Organization.

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

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.

[Return to Customer Tab Main](#)

## 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.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Organization	Yes	The organization name is a required field.
Organization Name Pronunciation	No	You can enter the organization name pronunciation.
SIC Code Version	No	Select the Standard Industry Code Version from the drop down list.
DUNS Number	No	Dunn and Bradstreet Number is pre-populated.
Tax Code/ID	No	Enter the tax code.
Email Addressbook	No	Enter the email address here or click the email address book to select another address.
Customer Category	No	Select customer category from the drop down list.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Last Order Date	No	View the last order date.
Web Site Address Book	No	Click the link to view the organization's web site. Click the icon to add or edit web site addresses.
External/Internal	No	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
Number	No	View the number assigned to the organization.
Alias	No	Enter an organization alias.
SIC Code	No	Select an SIC code by entering a partial code and clicking <b>Go</b> . Select from the search results which are a subset of the SIC code version.
External System Number	No	Click the "External System Number" link to view details.

Field	Required Field	Description
Phonebook	No	Click the phonebook link to select another party phone number to display.
Business Line	No	Enter a business line, if applicable.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
Status	No	Select a status from the drop down list.

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](#)

## Adding Classifications

You can add classifications to an organization, person, or contact.

### Navigation

Customer > Organization, Person, or Contact > Classification

### Prerequisites

Classifications must be set up from the Administration tab. Click here to go to [Classifications](#).

### Steps

1. Select a Class Category from the drop down list.

The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.

5. Choose a code by selecting the "Select" check box.
6. Click the **Select** button.

[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**.

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](#)
- [Adding a Partner to a Sales Team](#)
- [Adding a Resource Team to a Sales Team](#)
- [Removing a Sales Team Member](#)

[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 wild card.
    3. Click **Go**.
  - To search using **Advanced Search**:
    1. Click the **Advanced Search** link.  
The Organization Search page opens.
    2. Enter search filters and display options.
    3. 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.
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](#)

## Removing a Sales Team Member (Organization)

### Navigation

Customer > Organization > Sales Team Member

### 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, 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 **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.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Name	No	Enter the lead name.
Customer	No	View the customer number by clicking the link.
Location	Yes	Enter the location address.
Project Name	No	Enter the full or partial name of the project and click <b>Go</b> .
Assign To	Yes	Enter the full or partial name of the person you want to assign the lead to and click <b>Go</b> .
Status	Yes	Select a status from the drop down list.
Channel	No	Select a channel from the drop down list.
Timeframe	No	Select a time frame from the drop down list.
Campaign	Yes	Enter the full or partial name of the campaign and click <b>Go</b> .
Budget	No	Enter the total budget and select a currency from the drop down list.
Decline Reason	No	Enter a decline reason, if applicable.
Close Reason	No	Enter a close reason, if applicable.
Lead Number	No	View the lead number.
Urgent	No	Select the Urgent check box if this is an urgent lead.
Qualified	No	Select the Qualified check box if the lead is qualified.
Accepted	No	Select the Accepted check box if the lead is accepted.
Assigned Date	No	Select an assigned date by clicking the calendar icon and choosing a date.
Lead Rank	No	Select a lead rank from the drop down list.
Vehicle Response Code	No	Select a vehicle response code from the drop down list.
Budget Status	No	Select a budget status from the drop down list.

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

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

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.

### 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.

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](#)

## 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.  
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](#)

[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**.

[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](#)
- [Maintaining Account Details](#)
- [Viewing Account Sites](#)
- [Viewing Account Roles](#)
- [Viewing Account Relationships](#)

[Return to Customer Tab Main](#)

## 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:

Field	Required Field	Description
Account Name	No	Enter the account name.
Account Number	Yes	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.
Status	No	Select a status from the drop down list.

Field	Required Field	Description
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.
Subcategory Code	No	Select a subcategory code from the drop down list.
Tax Code	No	Select a tax code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.

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.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Account Name	No	Enter the account name.
Account Number	Yes	View the account number.
Status	Yes	Select a status from the drop down list.
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.
Established Date	No	Select the date the account was established from the calendar.
Subcategory Code	No	Select a subcategory code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.
Tax Code	No	Select a tax code from the drop down list.
Current Balance	No	View the current account balance.
Payment Term	No	Enter the payment terms.

Field	Required Field	Description
Suspension Date	No	View the suspension date.
Termination Date	No	View the termination date.

6. Edit information.

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.

[Return to Customer Tab Main](#)

## 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

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.

## Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, select 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:

Link	Description of Data	Data Source
Orders	View order number, reference number, customer name, date ordered, booked date, order status, p.o. number, and shipment details.	iStore
Invoices	View invoice number, invoice date, type, original amount, amount due, due date, p.o. number, applied amounts, and payment details.	iSupport
Service Requests	View service request number, description, product, urgency, status, contact person, phone number, and email address.	iSupport

Link	Description of Data	Data Source
Products	View description, product number, reference number, serial number, status, and revision.	iSupport
Returns	View date, number, currency, amount, and return status.	iSupport
Projects		Marketing Online
Campaigns	View campaign, schedule, start date and end date.	Marketing Online
Events	View events, start date, and end date.	Marketing Online

4. Click a link to view the details of any available 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.

- [Creating a Note](#)
- [Viewing a Note](#)

[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](#)
- [Adding an Attachment to a Task](#)

[Return 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](#)
- [Viewing an Existing Attachment](#)

[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 Person subtab:

- [Personalizing Person Summary](#)

- [Updating Person Summary Table](#)
- [Creating a Person](#)
- [Maintaining Person Details](#)
- [Searching for a Person](#)
- [Adding Classifications](#)
- [Sending Collateral](#)
- [Creating and Maintaining Relationships](#)
- [Sales Teams](#)
- [Leads](#)
- [Creating Opportunities](#)
- [Maintaining Quote Details](#)
- [Interactions](#)
- [Accounts \(Person or Organization\)](#)
- [360 Degree View](#)
- [Notes](#)
- [Tasks](#)
- [Attachments](#)

[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.

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Middle Name	No	Enter the middle name.
Last Name Pronunciation	No	Enter the phonetic spelling of the last name.
First Name Pronunciation	No	Enter the phonetic spelling of the first name.
Preferred Name	No	Enter a preferred name, if applicable.
Title	No	Select a title from the drop down list.
Second Title	No	
Suffix	No	Enter a suffix, if applicable.
Gender	No	Select a gender from the drop down list.
Date of Birth	No	
Native Language	No	
Status	No	Select a status from the drop down list.

The following table describes the Business Information section.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Relationship	No	Select a relationship from the drop down list.
Organization	Yes	Select an organization to form the business relationship with.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking <b>Go</b> .
Mail Stop	No	
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.
Job Title Type	No	

Field	Required Field	Description
Role	No	Select a role from the drop down list.
Business Phone Book	No	Select a phone number from the party list by clicking the phonebook icon.
Start Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Select the check box to indicate that the person is a decision maker.
Reference	No	Select the check box to indicate the person can be considered a reference.
Do Not Mail	No	Select the check box to indicate that no mail is to be sent.

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.

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Preferred Name	No	Enter the preferred name.
Title	No	Select a title from the drop down list.
Suffix	No	Enter a suffix, such as Mr., Mrs., Ms., Dr.
Gender	No	Select gender from the drop down list.
Personal Phone Book	No	To change the phone number, click the phone book icon.
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
External System Number	No	View the external system number.
Last Name Pronunciation	No	Enter the pronunciation of the last name.
First Name Pronunciation	No	Enter the pronunciation of the first name.
Middle Name	No	Enter the middle name.
Second Title	No	Enter the second title, if desired.
Date of Birth	No	Select the date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.
Last Order Date	No	View the last order date.
Status	No	Select from the drop down list.

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
  - **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](#)

## Adding Classifications

You can add classifications to an organization, person, or contact.

### Navigation

Customer > Organization, Person, or Contact > Classification

### Prerequisites

Classifications must be set up from the Administration tab. Click here to go to [Classifications](#).

### Steps

1. Select a Class Category from the drop down list.  
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.
5. Choose a code by selecting the "Select" check box.
6. Click the **Select** button.

[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.

### 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**.

[Return to Customer Tab Main](#)

## 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 record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

- [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
  - Edit the status by selecting from the drop down list
  - View Type
  - View Primary
14. In the Roles section, you can do the following:
- Choose Role or Roles from the drop down list
  - Designate a primary role
15. In the Restrictions section, you can do the following:
- Erase a restriction by clicking the erase icon
  - Change the restriction type by selecting from the drop down list
  - Select start and end dates by clicking the calendar icon
  - Enter a reason into the "Reason" field
16. Click **Update**.

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

**Note:** The address of the relationship must be an address of the related organization.

[Return to Customer Tab Main](#)

## 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. 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.

2. Click a person's name link to select it.

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

3. 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**

4. Click **Add Relationship**.

The Add Person to Person Relationship page opens.

5. In the Select a Person field, enter the full or partial name and click **Go**.

6. 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.

7. Enter the address.

8. Choose a Relationship Type from the drop down list.
9. Enter a Start Date and optionally enter an End Date. If you do not enter a start date, it will default to the current date.
10. Optionally, select a phone number by clicking the Phonebook icon.
11. Select a status from the drop down list.
12. In the Notes section, you can enter a note by selecting the note type from the drop down list, entering the note text in the text field.
13. Click **Create**.

The Relationship Detail page opens. From this page you can edit details about the relationship, roles, addresses, and restrictions.

14. 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](#)
- [Adding a Partner to a Sales Team](#)
- [Adding a Resource Team to a Sales Team](#)
- [Removing a Sales Team Member](#)

[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 fro 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.

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](#)

[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.

Field	Required Field	Description
Name	No	Enter the lead name.
Customer	No	View the customer number by clicking the link.
Location	Yes	Enter the location address.
Project Name	No	Enter the full or partial name of the project and click <b>Go</b> .
Assign To	Yes	Enter the full or partial name of the person you want to assign the lead to and click <b>Go</b> .
Status	Yes	Select a status from the drop down list.
Channel	No	Select a channel from the drop down list.
Timeframe	No	Select a time frame from the drop down list.
Campaign	Yes	Enter the full or partial name of the campaign and click <b>Go</b> .
Total Budget	No	Enter the total budget and select a currency from the drop down list.
Decline Reason	No	Enter a decline reason, if applicable.
Close Reason	No	Enter a close reason, if applicable.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Lead Number	No	View the lead number.
Urgent	No	Select the Urgent check box if this is an urgent lead.
Qualified	No	Select the Qualified check box if the lead is qualified.
Accepted	No	Select the Accepted check box if the lead is accepted.
Assigned Date	No	Select an assigned date by clicking the calendar icon and choosing a date.
Lead Rank	No	Select a lead rank from the drop down list.
Vehicle Response Code	No	Select a vehicle response code from the drop down list.
Budget Status	No	Select a budget status from the drop down list.

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

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

**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](#)

[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**.

To search using **Quick Find**:

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

To search using **Advanced Search**:

1. Click the **Advanced Search** link.  
The Person Search page opens.
2. Enter search filter information and display options.
3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Select a person from the Search Results page by clicking the person's name link.  
The **Person Detail** page opens.
4. Click the **Interactions** link.
5. You can select filters such as Media Type, Activity, Source, and Date Ranges.
6. 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.

[Return to Customer Tab Main](#)

## 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](#)

[Return to Customer Tab Main](#)

## 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 \(Person\)](#)

[Return to Customer Tab Main](#)

## 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, select 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:

Link	Description of Data	Data Source
Orders	View order number, reference number, customer name, date ordered, booked date, order status, p.o. number, and shipment details.	iStore
Invoices	View invoice number, invoice date, type, original amount, amount due, due date, p.o. number, applied amounts, and payment details.	iSupport
Service Requests	View service request number, description, product, urgency, status, contact person, phone number, and email address.	iSupport
Products	View description, product number, reference number, serial number, status, and revision.	iSupport
Returns	View date, number, currency, amount, and return status.	iSupport
Projects		Marketing Online
Campaigns	View campaign, schedule, start date and end date.	Marketing Online
Events	View events, start date, and end date.	Marketing Online

4. Click a link to view the details of any available 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](#)
- [Viewing a Note](#)

[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.

[Return to Customer Tab Main](#)

## 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](#)
- [Maintaining Task Details](#)

[Return to Customer Tab Main](#)

## 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.

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

Field	Required Field	Description
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.

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](#)
- [Viewing an Existing Attachment](#)

[Return to Customer Tab Main](#)

## 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**.

[Return to Customer Tab Main](#)

## Viewing an Existing Attachment (Person)

### Navigation

Customer > Person

### 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](#)
- [Adding Classifications](#)
- [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.
  - 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

### 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.

[Return to Customer Tab Main](#)

## Maintaining Contact Details

### 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](#)

## Adding Classifications

You can add classifications to an organization, person, or contact.

### Navigation

Customer > Organization, Person, or Contact > Classification

### Prerequisites

Classifications must be set up from the Administration tab.

### Steps

1. Select a Class Category from the drop down list.

The Class Category determines the Classification Codes you will be able to search on.

2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.
5. Choose a code by selecting the "Select" check box.
6. Click the **Select** button.

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

The Contact Search page opens.
    2. Enter search filter information and display options.
    3. Click **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.
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**.

[Return to Customer Tab Main](#)

## 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.

[Return to Customer Tab Main](#)

## Contact Lists Subtab

A contact list is a list of your business acquaintances that you wish contact.

There are two ways to create a contact list:

- [Creating a Contact List Using Filters](#)
- [Creating a Contact List by Manually Adding Contacts](#)

You can also perform the following functions from the Contact List subtab:

- [Saving a Contact List](#)
- [Downloading a Contact List](#)
- [Personalizing the Summary Table Display](#)
- [Adding Additional Filters to a Contact List](#)
- [Viewing List Filters](#)
- [Manually Add a Contact to a List](#)
- [Removing a Contact from a List](#)
- [Removing a List](#)

[Return to Customer Tab Main](#)

## Creating a Contact List Using Filters

Use the following procedure to create a contact list using filters.

### Navigation

Customer > Contact List

### Prerequisites

Contacts must exist.

### Steps

1. Click **Create Contact List**.
2. Enter the list's name.
3. Select the Public or Private radio button to indicate whether you want to create a private list or a public list that can be accessed by others.
4. Select the "Use Filters to Find Contacts" radio button.
5. Click **Create**.

This takes you to the filters section where you can enter certain criteria to create the contact list. The "List of Filters" page opens.

Use the following filter categories:

- a. **Contact** includes:
  - **General:** General information about the contact such as, name, date of birth, phone number.
  - **Relationship:** Information about the contacts relationships such as relationship type, role type, department.
  - **Address:** Contacts address such as city, state, country, or address status.
- b. **Issues:** Based on issue criteria, such as holdings, watch lists, trade roll ups or sectors. You can add additional filters by clicking the Add Another Criterion button. Please note, you must select one criteria in addition to a date range in order to return any results.
- c. **Classification:** How all classifications you choose will be related to one another for the filter. How you want the classification criteria to be related to each other by selecting the "AND Condition" or "OR Condition" radio button.

6. After you have selected the filters that you want to choose, click **Apply Filter**.  
If you want to clear the filters you have selected, click **Restore**. To quit creating the list and return to the List Summary Page, click **Cancel**. Please note, once you have applied a set of filters, if you want to re-filter the list, you cannot use the same filters again. For example, if you filter a list based on sales teams, and then decide that you want to filter the list further. The sales team filters will not appear as an option for the additional filter.
7. A list using the filters you have selected is returned.

[Return to Contact List](#)

## Creating a Contact List by Manually Adding Contacts

Use the following procedure to create a contact list by manually adding contacts.

### Navigation

Customer > Contact List

### Prerequisites

Contacts must exist.

### Steps

1. Click **Create Contact List**.  
A contact list page with no contacts opens. You can manually add contacts to the list here.
2. Select the "Manually Add Contacts" radio button.
3. Click **Create**.
4. In the "Add a Contact" field, enter the full or partial contact name using % as a wildcard.
5. Click **Go**.
6. From the search results, select the contact you want to add to the list.
7. Click **Select**.
8. Once you have added all the contacts that you want on the list, enter a name for the list.

9. Click **Save**.

[Return to Contact List](#)

## Saving a Contact List

### Navigation

Customer > Contact List

### Steps

After you have selected and applied the filters, you have a couple of options in saving the contact list, **Save** or **Save As**.

- If you want to save the file as it is, click **Save**.
- If you want to save the file under a different name, enter the name in the **Save As** text field. Click **Save**.

Additionally, you can indicate whether the list is a public or private list by selecting the **Public** or **Private** radio button. A private list can only be viewed by the list creator. A public list is viewable by any person who has access to the contacts on the list. However, a public list cannot be changed by another user.

When you are saving contact lists, please note that the contact lists that you create (either public or private) must have unique names. However, another user can create a public contact list with the same name as your contact list.

[Return to Contact List](#)

## Downloading a Contact List

You can download a contact list to a comma separated value file. Click the **Download to CSV** icon next to the **Go** button.

[Return to Contact List](#)

## Personalizing the Summary Table Display

You can personalize the way the summary table is displayed on the page by clicking the **Personalize** icon next to the **Download to CSV** icon.

## Navigation

Customer > Contact List

## Steps

1. Click the **Personalize** icon.  
The Personalize Contact List page opens.
2. Select the items you want to display on the page by moving Available Columns to the Display Columns area.
3. Select sorting options.
4. Enter the number of rows to display.
5. Click **Apply**.

[Return to Contact List](#)

# Adding Additional Filters to a Contact List

After you have applied an initial set of filters and created a contact list, you can add additional filters to the contact list to narrow down the contact list.

## Navigation

Customer > Contact List

## Steps

1. Click the **Add Additional Filters** button.

This takes you to the filters section where you can enter certain criteria to create the contact list. The "List of Filters" page opens.

Use the following filter categories:

- a. **Contact** includes:
  - **General:** General information about the contact such as, name, date of birth, phone number.
  - **Relationship:** Information about the contacts relationships such as relationship type, role type, department.
  - **Address:** Contacts address such as city, state, country, or address status.



2. Click **Go**.
3. Select a contact from the search results.

[Return to Contact List](#)

## Removing a Contact from a List

### Navigation

Customer > Contact List

To remove a contact from a list, open the list from the summary table. Select the Remove check box and click **Update**.

[Return to Contact List](#)

## Removing a List

### Navigation

Customer > Contact List

To remove an entire list from your summary table, select the Remove check box. Click **Update**.

[Return to Contact List](#)

## Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab.

- [Viewing the Customer Classification Report](#)
- [Viewing the Task Classification Report](#)

[Return to Customer Tab Main](#)

## Viewing the Customer Classification Report

This report will return all parties within the chosen party type that meet the classification criteria chosen.

## Navigation

Customer > Reports > Customer Classification Report

## Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding P or C to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.
6. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
7. Select your sorting options from the available drop down lists.
8. Click **Run Report**.

[Return to Customer Tab Main](#)

## Viewing the Task Classification Report

This report will return all parties within the chosen party type and tasks associated with those parties that meet the classification criteria selected.

## Navigation

Customer > Reports > Task Classification Report

## Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding P or C to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.
6. Optionally, enter or select one or more of the following task filters:

- a. Name
  - b. Number
  - c. Type
  - d. Date Range
  - e. Priority
  - f. Status
  - g. Include Private
7. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
  8. Select your sorting options from the available drop down lists.
  9. Click **Run Report**.

Please refer to the *Oracle Customer Intelligence Concepts and Procedures* guide for more information about these reports.

[Return to Customer Tab Main](#)

## 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.

[Return to Oracle Sales Online Main Menu](#)

## 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.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Find Organization	No	Find an organization by entering a name, selecting a state and clicking <b>Go</b> .
Organization	Yes	Enter the organization.
Alias	No	Enter an alias, if applicable.
Phone Number	No	Enter a phone number.
Phone Type	No	Select a phone type from the drop down list.
Email Address	No	Enter an email address.
Customer Category	No	Select a customer category code from the drop down list.
Annual Revenue	No	Select an annual revenue currency from the drop down list and enter the annual revenue.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year established.
Web Site	No	Enter the web site address.
Do Not Mail	No	Select the do not mail check box if the partner should not receive mail.
Business Line	No	Enter the business line.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
SIC Code	No	Enter the Standard Industry Code.
DUNS Number	No	Enter the Dunn and Bradstreet number.
Tax ID	No	Enter the tax identification number.

Use the following table to identify the Partner Detail fields.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Relationship Type	No	Select the relationship type from the drop down list.
Purchase Method	No	Select the purchase method from the drop down list.
Target Revenue	No	Select a currency from the drop down list and enter the target revenue.
Channel Manager Name	No	Enter the full or partial name and click <b>Go</b> .
Phone Support Person	No	Enter the full or partial name and click <b>Go</b> .
Relationship Type	No	Select the relationship type from the drop down list.

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

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Address Type	Yes	Select an address type from the list of values.
Primary	No	Select the primary check box if the address is considered the primary address.

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

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

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Add a Person	Yes	If you are going to add a person relationship, enter the full or partial name and click the <b>Go</b> button.
Erase	No	To erase a relationship from the summary table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.

Field	Required Field	Description
Last Name	Yes	Enter the last name.
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Addressbook	No	Select an email address by clicking the email address book icon.
Job Title	No	Enter a job title.
Decision Maker	No	Select the decision maker check box if the person is a decision maker.

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

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

## 2. Click **Create**.

[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.

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.
Preferred Name	No	Enter a preferred name, if applicable.
Title	No	Select a title from the drop down list.
Suffix	No	Enter a suffix, if applicable.
Gender	No	Select a gender from the drop down list.
Status	No	Select a status from the drop down list.
Phonetic Last Name	No	Enter the phonetic last name.
Phonetic First Name	No	Enter the phonetic first name.
Middle Name	No	Enter the middle name.
Second Title	No	Enter the second title, if applicable.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Date of Birth	No	Select a date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.

In the Business Information section, you can enter information which is described in the following table.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Relationship	No	Select a relationship from the drop down list.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking <b>Go</b> .
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.
Role	No	Select a role from the drop down list.
Business Phone Book	No	Select a phone number from the party list by clicking the phonebook icon.
Start Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Select the check box to indicate that the person is a decision maker.
Reference	No	Select the check box to indicate the person can be considered a reference.
Do Not Mail	No	Select the check box to indicate that no mail is to be sent.
Organization	No	Enter the full or partial name and click <b>Go</b> .
Mail stop	No	Enter the mail stop.
Department Type	No	Select department type from the drop down list.
Job Title Type	No	Select job title type from the drop down list.
Preferred Language	No	Default is English. Select from the drop down list.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Business Email Addressbook	No	
End Date	No	

If you want to add personal information, the following table describes the Personal Information fields.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Personal Phone Book	No	Select a phone number from the phone book by clicking the phonebook icon.
Address Type	Yes	Select an address type from the list of values.
Address Line 1	Yes	Enter the address.
Address Line 2	No	Enter additional address information.
Address Line 3	No	Enter additional address information.
Address Line 4	No	Enter additional address information.
County	No	Enter the county.
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.
Personal Phone Book	No	Select a phone number from the phone book by clicking the phonebook icon.
Personal Email Address Book	No	Select an email address by clicking the icon.
City	No	Enter in the city field.

Field	Required Field	Description
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
Country	Yes	Select country from the drop down list.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

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**.

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](#)
- [Globalization](#)

From the Sales subtab, you can manage the following areas:

- [Menu Administration](#)
- [Home Page](#)
- [Sales Category](#)
- [Call Center](#)
- [Lead](#)
- [Opportunity](#)
- [Forecast](#)
- [Accesses](#)

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](#)

[Back to Administration Tab Main](#)

## 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:

- 1987 SIC: The 1987 edition of the U.S. Industrial Classification Codes (SIC).
- 1977 SIC: The 1977 edition of the U.S. Industrial Classification Codes (SIC).
- 1972 SIC: The 1972 edition of the U.S. Industrial Classification Codes (SIC).
- 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.
- **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.

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

## Globalization

You can manage the following items from the Globalization section:

- [Calendar Type](#)
- [Accounting Calendar](#)

- [Type Mapping](#)
- [Period Rate](#)
- [GL Daily Rate](#)
- [Transaction Calendar](#)

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## 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.
  - 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).

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## GL Daily Rate

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

### 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.
  - 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.

[Back to Administration Tab Main](#)

## Transaction Calendar

No help is currently available.

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

**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**.

[Back to Administration Tab Main](#)

## 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
  - Link URL (should be the function name of the ERP application page)
  - Description of this function
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.

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## Sales Category

Use the following information to manage the sales category section:

- [Interest Type](#)
- [Interest Code](#)
- [Interest Status](#)
- [Plan Element Mapping](#)

[Back to Administration Tab Main](#)

## 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/Opportunity 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.

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

## Call Center

The Call Center is used for Oracle TeleSales. For more information on Oracle 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

[Back to Administration Tab Main](#)

## Lead

You can perform the following functions from the Lead Administration section:

- [Lead Scorecard](#)
- [Lead Rank Mapping](#)
- [Lead Import](#)

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## 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 page 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**.

[Back to Administration Tab Main](#)

## 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*.

[Back to Administration Tab Main](#)

## Opportunity

- [Win Probability](#)
- [Sales Stage](#)
- [Status Code](#)

- [Sales Methodology](#)

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

### 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

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.

[Back to Administration Tab Main](#)

## 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.

[Back to Administration Tab Main](#)

## Forecast

- [Forecast Category](#)
- [Forecast Category Mapping](#)
- [Budget/Revenue Entry](#)

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

## 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

### 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.

[Back to Administration Tab Main](#)

## 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

### 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.

[Back to Administration Tab Main](#)

## Accesses

- [Territory](#)
- [Resource](#)
- [Customer](#)
- [Lead](#)
- [Opportunity](#)

[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**.

[Back to Administration Tab Main](#)

## 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**.

[Back to Administration Tab Main](#)

## Customer

Select a customer/address and click the Search button to see the resources assigned to the 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.

[Back to Administration Tab Main](#)

## Lead

Select a lead and click the Search button to see the resources assigned to the 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.

[Back to Administration Tab Main](#)

## Opportunity

Select an opportunity and click the Search button to see the resources assigned to the 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.

[Back to Administration Tab Main](#)

---

---

# Oracle Sales Online Wireless

Oracle Sales Online Wireless provides wireless access to your critical sales information through your wireless device such as a mobile phone. You can update your sales forecast, check your appointments for the day, and review contact and opportunity information for your next appointment without using a computer.

See the following topics:

- [Managing Organization Information](#)
- [Searching for Organizations](#)
- [Editing](#)
- [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

2. Enter at least four characters.
  3. Select **Submit**.
  4. Optionally narrow your search criteria by performing the following steps:
    - a. Select **Enter First Name**.
    - b. Enter one or more characters.
    - c. Select **Submit**.
  5. If you want the search results to include only those persons that you can access, then select **Search**.
  6. If you want to search the whole database, then select **Quick Find**.
- A list of persons appears.

## Using Sales Tasks

Use the following procedure to check your 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.

**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.

### 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.

