Oracle® TeleSales

Implementation Guide

Release 11*i*

November 2001

Oracle TeleSales Implementation Guide, Release 11*i*

Part No. A95484-01

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Oracle TeleSales Implementation Guide, Release 11*i*

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Oracle Corporation
CRM Content Development Manager
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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle TeleSales Implementation Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle TeleSales

  If you have never used Oracle TeleSales, Oracle suggests you attend one or more of the Oracle TeleSales training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.
- Knowledge of administrative tasks for Oracle Applications.

  To learn more, read the *Oracle Applications Administrator's Guide*.

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

How This Guide Is Organized

Although this document is entitled the *Oracle TeleSales Implementation Guide*, it brings together all of the information you need to implement three Oracle sales products: Oracle Field Sales, Oracle Sales Online, and Oracle TeleSales.

The implementation guides for these three products are identical except for the title and the preface.

This guide includes the following chapters and appendices:

- Chapter 1, the Introduction, includes an overview of the entire sales family of Oracle CRM applications as well as a separate overview of each of the three products.
- Chapter 2, "Technology, Requirements, and Performance", outlines the technologies and dependencies for the Oracle sales family of eBusiness Suite products and provides you with a list of technologies required to implement these products. Additionally, this chapter lists hardware and software requirements where applicable.
- Chapter 3, "Dependency Requirements and Verification", provides information about the mandatory and conditional dependencies for the sales family of CRM eBusiness Suite products.
- Chapter 4, "Implementation Overview", includes a checklist of the steps required to implement each of the sales applications individually. You can use this chapter as a starting point for your implementation.
- Chapter 5,"Implementation Tasks", consists of the steps themselves. The steps in this chapter follow the same order as the implementation guide checklists in the previous chapter. Not all steps are required for each application. Each step lists the applications that require it.
- Chapter 6,"Verifying the Implementation", is intended to give you tasks to perform to make sure that the application was installed properly.
- Appendix A, "System Profile Options", includes a table of all of the relevant system profile options for the steps in this guide. Some of these profile options are also listed in the step where you set them, but some appear only in this table.
- Appendix B, "Lookups", lists the lookups for all three applications.
- Appendix C, "Concurrent Programs", lists the concurrent programs used by the three sales applications.

This guide is optimized for online delivery. This means that it is best read in the PDF or HTML formats. However, each checklist step refers you to the section and page where that step is explained.

How To Use This Guide

If you are implementing a single application, you can use the appropriate checklist in Chapter 4, "Implementation Overview", as your starting point.

You can also go step-by-step through the procedures in Chapter 5, "Implementation Tasks", skipping the steps that do not apply to your product.

You can tell whether a step is appropriate for your product by looking directly below the title to the **Applies to** heading.

About the Two User Interfaces Required for Implementation

The implementation procedures in this guide require you to use both Oracle Forms and HTML-based interfaces.

Oracle CRM applications are moving implementation and administration functionality from Forms to HTML. During the transition some of the setups can be performed both in Forms windows and HTML pages. This guide gives you the steps for the HTML version whenever possible.

You can access both interfaces by launching Forms first and logging in under the Oracle Sales Administrator responsibility.

You can access any of the HTML-based administration pages by navigating to **Administration > Administration** in the Forms Navigator. This launches your browser to the Administration tab.

About the Responsibilities Required for Your Implementation

Unless otherwise specified, all steps detailed in this guide can be carried out from the Oracle Sales Administrator responsibility.

How This Guide Represents Navigation

This guide represents navigation in the same way for both Oracle Forms-based and HTML-based setup windows.

The Forms navigation path, found under the Forms Navigation heading, gives you the location of the Form in the Navigator.

For example:

Forms Navigation:

HRMS Setup > Organization

This navigation path tells you to open up the HRMS Setup heading in the Navigator and select Organization.

The HTML navigation path is composed of the following:

Tab > Subtab > Side Navigation Panel Heading > Link

For example:

HTML Navigation

Administration > Sales > Call Center > Campaign Assignment

This navigation path tells you to select the Sales subtab on the Administration tab and click the Campaign Assignment link under the Call Center heading in the side panel menu.

When you see both the Forms Navigation and HTML Navigation headings, this means that you can navigate to the HTML window from the Forms window.

For example:

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Call Center > Campaign Assignment

These two navigation paths tell you to navigate to **Administration > Administration** on the Forms navigator. This launches your browser to the Administration tab in the HTML interface. There you select the Sales subtab on the Administration tab and click the Campaign Assignment link under the Call Center heading in the side panel menu.

Required and Optional Steps

All steps listed in this guide are required unless stated otherwise. Oracle recommends the implementation of the required products and modules of the CRM eBusiness suite to ensure the full functionality of your product. However, you can safely omit required steps if you do not need to implement a particular functionality at your site or are configuring your product to work with third party products.

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/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle TeleSales.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on Metalink.

Related Documentation

Oracle TeleSales shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle TeleSales.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle TeleSales (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing"Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

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

Installing Oracle Applications, Release 11i

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

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 concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer’s Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle TeleSales. This manual details additional steps and setup considerations for implementing Oracle TeleSales with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle TeleSales with Oracle Applications’ Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle TeleSales.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle TeleSales implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Implementing CRM Applications

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

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle Incentive Compensation Implementation Guide

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

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle TeleSales and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle TeleSales working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle Metalink

Oracle Metalink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle Metalink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use Metalink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle Metalink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction

This topic group provides an overview of the Oracle sales family of applications and its components and lists new functionality for this release.

- Section 1.1, "Oracle Sales Family Overview" on page 1-1
- Section 1.2, "Oracle Sales Online Overview" on page 1-2
- Section 1.2.1, "New in this Release" on page 1-4
- Section 1.3, "Oracle TeleSales Overview" on page 1-6
- Section 1.4, "Oracle Field Sales / Laptop Overview" on page 1-15
- Section 1.5, "Oracle Field Sales / Palm Overview" on page 1-16
- Section 1.6, "Oracle Field Sales / Wireless Overview" on page 1-16

1.1 Oracle Sales Family Overview

Oracle Sales is a comprehensive family of tightly integrated applications to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and web storefronts to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

The Oracle sales family of applications includes:

- Sales Online
- Field Sales Laptop / Palm / Wireless
- TeleSales

- Incentive Compensation
- Partners Online
- Sales Intelligence
- Collections

1.2 Oracle Sales Online Overview

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

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 Sales Online to analyze their pipelines. 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 Sales Online:

Level	How it works
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 histories.

Notes, Tasks, and Attachments

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

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

Partners

Users can now take advantage of the expanded definition of partner relationships and integration with Partners Online for indirect selling channels. And, using an exchange server, users can use Opportunity Exchange for co-selling.

Incentive Compensation

Integration with Oracle Incentive Compensation enables 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.

1.2.1 New in this Release

The following new features have been added to Sales Online in this release.

Home Page Metrics, Charts, and Reports

Sales Online provides even more home page tools. Users can choose from opportunity, lead, favorites, system counts, opportunity variance, 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. Additionally, you can create links to external or internal sources or information using the External Tools functionality.

Personalization and Configuration

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

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 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 by country.

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 TeleSales agents 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. This 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.

1.3 Oracle TeleSales Overview

Oracle TeleSales is an application designed for inside sales professionals, whether they are inbound telesales or outbound telemarketing agents. Oracle TeleSales provides a versatile set of tools to help the inside sales team manage the sales cycle - from prospecting to booking orders. Key functions include comprehensive customer management, list generation; lead, opportunity and pipeline management; quote and order generation; event registration and collateral fulfillment. Oracle TeleSales offers a true multi-channel selling solution that leverages all sales channels: whether selling over the phone, via the web or through mobile devices. ' Out of the box' integration with other eBusiness Suite applications further extends Oracle TeleSales functionality:

- Oracle Interaction Center to enable inbound / outbound call routing, predictive dialing, and call scripting functionality
- Oracle Marketing Online (OMO) to provide a true close-loop marketing solution from campaign to cash
- Oracle Sales Online (OSO) to enable collaborative selling between the field sales and inside-sales organizations
- Oracle iStore to enable interactive selling on the web
- Oracle Order Capture to enable integration with ERP applications

eBusiness Center provides a complete cross-application dashboard for Oracle call center applications. In addition to sales and relationship management functionality, the eBusiness Center provides elements of service and collections for an unparalleled view into the health and activities of all customers.

1.3.1 New in This Release

The major new features in Oracle TeleSales include:

- eBusiness Center support for Service Requests, Collections, and the ability to create a true "universal agent" with the 360-degree view of customers.
- Ability to hide unnecessary tabs in eBusiness Center, Lead Center, and Opportunity Center.
- Ability to specify the default tab as well as configure the Organization and Person tab using folder technology.
- The ability to add two custom tabs into the eBusiness Center.
- A configurable Dashboard to display key business indicators for sales, service, and collections.
- Partners Online integration to support partner sales efforts.
- Addition of the Service Request and Collection tab in the eBusiness Center.

- Support for multiple sales Methodologies for best practices sales strategies.
- Closer integration with Oracle Marketing Online to display targeted campaigns.
- Call list per campaign schedule without the use of Advance Outbound.
- Enhanced Lead Management and Opportunity Management to streamline sales processes.
- Enhanced interaction tracking with automatic start and stop option and tracking of interactions across the eBusiness Center, Lead Center, and Opportunity Center.
- New Note tab to streamline notes creation and review.
- Usability improvements in Events, Collateral, Searches, Universal Work Queue, and Tasks.
- Window labeling
- Additional use of Trade Community Architecture features to support reciprocal relationships and party classification functionality.

Interaction Tracking

In this release, Oracle TeleSales provides a more automated approach to interaction tracking. Oracle TeleSales will automatically start interactions, track activities and end interactions based on a pre-defined set of business rules built into the application. Users will have the option of manually starting and ending an interaction but will not be required to do so. This is a radical change from the implementation of interactions in past releases which required the user to manually start all non-media interactions and manually end all interactions.

Key functionality for this release includes:

- Automatic Interaction Start: An interaction starts when an Oracle TeleSales agent selects work from the UWQ or search window.
- Manual Interaction Start: An agent can start an interaction manually through a menu selection or by clicking a toolbar icon.
- Automatic Interaction Wrap Up: Interaction will automatically wrap up when the root form is closed.
- Manual Interaction Wrap Up: An agent can end an interaction manually and enter wrap-up information by making a selection from a menu or by clicking a toolbar icon.

- Bridged Interactions: Interactions with a single customer that may span one or more centers (eBusiness Center, Lead Center or Opportunity Center) will be treated as a single interaction.
- Timings and Media item Id: Interactions timings will be tracked to identify talk time versus wrap up time. Media item Id tracks specifically which phone call resulted in creation of the interaction.
- Seeded Oracle TeleSales Activities: Multiple activities can be tracked per interaction based on where agents have navigated through eBusiness Center, Opportunity Center, or Lead Center. These activities are automatically seeded in the Wrap Up screen and are saved with each Interaction.

Customer Management Enhancements

This release provides enhancements to the eBusiness Center to support the Oracle Trading Community Architecture (TCA) modifications, reciprocal relationships, account searches, and other customer data elements.

Enhancements to the eBusiness Center include:

- Replacement of the profile section in the eBusiness Center header. The profile now supports foldering.
- Consolidation of all contact methods such as addresses and contact points.
- Overview Tab includes targeted campaigns.
- Exposing of additional data elements and enable foldering on the organization tab.
- Exposing of additional data elements and enable foldering on the person tab.
- The relationship tab provides details about the relationship.
- Account Tab provides restrictions on which sensitive data element can be updated.
- Partner detail provides additional information regarding the partner.
- Support of reciprocal relationship.
- Support of the flexible new TCA party classification schema.
- Ability to query in the eBusiness Center using only email address.
- Ability to query in the eBusiness Center using only Oracle Accounts Receivable account number.

Notes Enhancements

In this release, Oracle TeleSales revamps the manner in which Notes are created, viewed, and saved by introducing a new Notes Tab. This provides easier access to notes and the ability to relate notes to multiple database objects, including persons, organizations, relationships, leads, opportunities.

Notes can be created using the Notes tab of the eBusiness Center, the Opportunity Center, and the Lead Center. The Note tab in each center is not the only source of notes, however.

Users can also view and enter notes using the Universal Search window and from other CRM modules, including Oracle Collections. The newly revamped note functionality allows the user to see any note related to a customer from any application.

Key functionality enhancements to notes include:

- A separate Notes Tab.
- Ability to create and view notes in eBusiness Center, Opportunity Center, Lead Center, and Universal search.
- Ability to relate notes to multiple objects.
- View existing notes related to an object.
- View notes in a summary view.

Collections and Service Tabs

In this release, eBusiness Center provides support for all Oracle call center applications. eBusiness Center now provides tabs to support Collections and Teleservice call center agents. Call center agents can make better decisions about how to sell, service or collect from their customers by this complete 360-degree view into the overall health of the account. Call center agents using eBusiness Center can handle several key scenarios:

- A sales agent can decide not to sell to a customer with many delinquent invoices
- A sales agent may decide to delay a sales call to a customer who has numerous or escalated service requests
- A service agent may decide not to answer service calls when customers are delinquent on service payments
- A service agent may be more responsive to customers when there are pending sales

- A collections agent may be more flexible if they understand numerous open service requests are causing payments to be withheld
- A collections agent can identify additional credit risks for delinquent customers who have pending sales
- All agents have the ability to view Contract details to help resolve service, sales and collections issues
- The teleservice functionality included in this release is derived from Oracle Customer Care application, which will be phased out in subsequent releases.

Call Center and Campaign Enhancements

In this release, Oracle TeleSales continues to improve campaign support by deepening integration with Oracle Marketing Online, Advanced Inbound, and Advanced Outbound. Oracle TeleSales is the execution channel for all call center marketing campaigns and adds improvements to response tracking and reporting. Telephony events and overall call handling to make call center campaigns more successful. Call center agents support several key scenarios:

A sales agent searches for the right offer based on a single code that the customer provides.

A sales agent quickly finds campaigns that the customer is targeted for to streamline their sales pitch.

Key functionality enhancements include:

- Single Source Code adoption to streamline campaign and offer identification and selection.
- List of Targeted Campaigns for all customers/prospects.
- Faster Inbound and Outbound Screen Pops.

Events

Users register customers and prospects using the Event tab in the eBusiness Center. The user goes to this tab to search for events, review event details, view event roster and note information, and enroll customers into an event or events.

There are four major scenarios that an Oracle TeleSales user will come across while enrolling customers in events.

- Caller has identified a campaign and would like to enroll in the event(s) associated with that campaign.

- Caller has not identified a campaign but would like to enroll into an event or events.
- Caller has identified a campaign and would like to enroll in the event(s) associated with that campaign as well as additional events not associated with the campaign.
- Enrollment cancellation.

A user of Oracle TeleSales can enroll a customer, as well as other contacts related to the contact or the contact's organization, in one or multiple events. That is why this release supports event registration in all views: the Person, Organization, and Relationship view. The user can search and view the details of an event and select the event for enrollment.

Key functionality enhancements include:

- Enrolling one or multiple contacts in multiple events in one order.
- Sending collateral associated with the event.
- Sending a confirmation email to the customer with the specifics of the event registration.
- Enrolling customers while in the relationship view.

Collateral

Agents use the Collateral Tab of the eBusiness Center to send collateral, search collateral, and view the request history for a customer.

There are three major scenarios for sending collateral to customers.

- Caller has identified a campaign and the agent would like to send the collateral associated with that campaign.
- Caller has not identified a campaign but the agent would like to send the customer collateral.
- Caller has identified a campaign and the agent would like to send collateral associated with that campaign as well as additional collateral not associated with the campaign.

An agent can send collateral to that customer as well as, possibly, other contacts related to the customer or the customer's organization. That is why this release supports collateral in all views: the Person, Organization, and Relationship view.

Key functionality enhancements include:

- Sending multiple collateral to multiple contacts in one order.
- Sending collateral in the relationship view by.
- Sending physical collateral.

Searches

Searching is the starting point of many business transactions and users expect fast response times. To optimize performance, this release offers two kinds of searches: Quick and Expanded. Quick searches include common field combinations while Expanded searches include those of the basic plus advance data criteria.

Key functionality enhancements include:

- One search and list management module, now the user will be able to perform both functions from the same screen.
- Quick search for high performance searches on a limited subset of elements.
- Combine both basic and advance search criteria on the same screen so no more reentering of data.
- Multiple searches can be performed without overriding the results from the previous search.
- Ability to view Notes for selected records from any search.
- Ability to save both the search parameter and search result for expanded search.

Opportunities

This release incorporates enhancement requests from customers and brings consistency across the sales suite of Oracle applications.

Key functionality enhancements include:

- Use of forecast dates at the purchase line level.
- Use of sales methodology in the opportunity maturation process.
- The ability to add whole sales teams to the opportunity sales team.
- The ability to view and update partner information.
- The ability to copy portions of an opportunity
- A stand-alone Opportunity Center

Leads

The integration with Oracle Sales Online means that leads created in Oracle TeleSales are visible to the field sales agent in the Oracle Sales Online leads tab and vice versa.

Key enhancements include:

- Stand-alone Lead Center
- Lead sales team
- Lead notes
- Lead attachments

Tasks

This release adds only a few minor enhancements:

- The ability to define a contact for a task when creating a new task from the Task tab
- The ability to assign a resource to a task when creating a new task from the Task tab
- Having the task display in the agent's calendar

Miscellaneous Enhancements

These include:

- Marketing Source code
- Default user role and group
- The ability to hide a tab
- Quotes on the Universal Work Queue
- Removal of the bottom call button bar from the eBusiness Center
- Folder forms
- Targeted source code listing
- Dashboard
- Single sign on for forecasting
- Source code detail
- The ability to set a default tab

1.4 Oracle Field Sales/Laptop Overview

Oracle Field Sales/Laptop provides salespeople with information when they are in the field. It is meant to be used when not directly connected to the customer database. The following topics summarize the functionality of Field Sales/Laptop.

Customer and Contact Management

Field Sales/Laptop provides salespeople with the information they need to effectively target their selling efforts. Sales representatives have access to personal contacts and key organization demographics. Contact information allows with a complete customer overview at each stage of the sales process, in both Business to Business and Business to Consumer environments. Before contacting a customer, a sales person can review customer information including: open opportunities and an interaction history. Comprehensive customer information allows sales people to better manage their customers and to plan each customer interaction more effectively.

Opportunity Management

Opportunities are managed remotely throughout the sales cycle. Field Sales/Laptop can track all deals in the sales pipeline down to expected purchases, win probability, sales stage, and close dates. Sales reps download their current sales opportunities to benefit from instant access to the information while away from the office.

Opportunity and Product Category Forecasting

Salespeople can create and revise forecasts at the opportunity and product category levels. Salespeople can calculate their total forecasted number by opportunities and in further detail, their opportunities by product category.

Tasks

Users can create and assign tasks to themselves or other team members. Tasks are organized in a work queue and can be sorted by priority, due date, and status. Additionally, tasks can be viewed through the Calendar under the Calendar tab through the Combination view.

Calendar

Field Sales/Laptop provides an easy to use calendar. You can view by day, week, month, or a combination of your day’s tasks with the activities you have scheduled for that day.

1.5 Oracle Field Sales/Palm Overview

Oracle Field Sales is comprised of Oracle Field Sales / Laptop, Oracle Field Sales / Palm, and Oracle Field Sales / Wireless. All products enable salespersons access to sales related data while they are traveling. Salespeople have the ability to create, view, and update customer sales information on a Laptop, Palm, or Wireless device without requiring a network connection. Information is accessed and stored locally and the same information is synchronized with Oracle's E-Business Suite. The wireless application provides similar functionality to view and update customer information on wireless handheld devices, but the main difference is that the access is real-time through wireless networks. The Field Sales products provide a means for the mobile sales force and the head office to remain up-to-date on customer interactions.

Oracle Field Sales / Palm Devices is a Palm based application that gives mobile users access to virtually the same information as the Oracle Field Sales / Laptop users. The Field Sales / Palm users benefit from using a smaller device that is easy to use, light in weight, and offers instant "on" capability. Also, the sales information is stored locally, so no network is required.

1.6 Oracle Field Sales/Wireless Overview

Oracle Sales Online Wireless is a wireless application that gives mobile users access to Oracle Sales Online functionality through wireless mobile devices, such as a WAP phone, PDA browser, or other wireless handheld device. Users have real-time access to sales information without being inside the office and without the need of a laptop computer, dependent on the modules used in Sales Online.

2 Technology, Requirements, and Performance

This section outlines the technologies and dependencies for the Oracle Sales family of eBusiness Suite products and provides you with list of the technology stack required to implement these products. The products covered are; Oracle Sales Online (OSO), Oracle TeleSales (OTS), Oracle Field Sales / Laptop (OFSL), Oracle Field Sales / Palm, Oracle Field Sales / Wireless.

- Section 2.1, "Architectural Overview" on page 2-1

Additionally, hardware and software requirements are listed, if applicable.

- Section 2.2, "Hardware Requirements" on page 2-2
- Section 2.3, "Software Requirements" on page 2-2

2.1 Architectural Overview

The following table lists the technology requirements for the Oracle Sales family of applications.

Technology	Product
Oracle Forms Designer, version 6.0.8.10.3	OSO
Oracle 8 Enterprise Edition Release, version 8.1.6	OSO, OFSL
Oracle Reports Designer, version 6.0.8.8.3	OSO
Oracle WebDB, version 2.2.2.1	OSO
Apache version, version 1.3.9	OSO
Java Developer Kit Server Side, version 1.2	OSO

Technology	Product
Jdeveloper - BC4J version 3.2.3.102	OSO, OFSL
Oracle Lite 5.0.0.4.0	OFSL
Dataserver (EE + InterMedia all options + Spatial), version 8.1.7.2	OTS
WorkFlow, version 2.6	OTS
InterMedia, version 8.1.7.2	OTS
Forms, version 6.0.8.15	OTS
Mobile Device Gateway 8.1.7.2	OFSL
EWT, version 3.4	OTS
JInitiator, version 1.1.8.13	OTS
MS Internet Explorer, version 5.5 or later This is the recommended browser for all HTML-based applications.	OSO,OFSL,OTS
Netscape Navigator, version 4.5 or above	OSO, OFSL, OTS

2.2 Hardware Requirements

The following is a list of hardware requirements for Oracle Field Sales/Laptop:

- Pentium III
- 128 MB RAM
- 1 GB HD

The following is a list of hardware requirements for Oracle Field Sales/Palm:

- Palm device with 8 MB
- Certified on Palm5x, 7x, IIIxe, m500, m505, and Handspring Visor

2.3 Software Requirements

The following is a list of software requirements for Oracle Field Sales/Laptop:

- MS Windows NT, 4.0, 95, 98, 2000

The following is a list of software requirements for Oracle Field Sales/Palm:

- Palm OS 3.5 and 4.0

3

Dependency Requirements and Verification

This section provides information about the mandatory and conditional dependencies for the Sales Family of eBusiness Suite products. The products covered are; Oracle Sales Online (OSO, Oracle TeleSales (OTS), Oracle Field Sales / Laptop (OFSL), Oracle Field Sales / Palm, and Oracle Field Sales / Wireless.

- Section 3.1, "Mandatory Dependencies" on page 3-1
- Section 3.2, "Conditional Dependencies" on page 3-2

3.1 Mandatory Dependencies

The following table lists the dependencies for the Oracle Sales Family of eBusiness Suite applications. Application A is said to be dependent on application or module B, if A will not run without the implementation of B.

CRM foundation modules must be implemented in full. Any dependent applications must be set up in full if you have purchased a license for that application. If you have not purchased a license, then you need only to set the application up to the extent allowed by the shared license which comes free of charge with your sales application. For example, if your organization has not purchase a license to use Oracle Inventory or Oracle Receivables applications, then you need only set up the limited components of these applications which are available free of charge.

Application or Module	Dependent Applications
Core Sales	OSO, OFSL, OTS
CRM Foundation Resource Manager	OSO, OFSL, OTS

Application or Module	Dependent Applications
CRM Gateway for Mobile Devices	OFSL
CRM Mobile Foundation	OFSL, Palm, and Wireless
General Ledger	OSO, OFSL, OTS
HRMS	OSO, OFSL, OTS
Trading Community Architecture	OSO, OFSL, OTS

3.2 Conditional Dependencies

The following table shows the integration points, also referred to as conditional dependencies, for Oracle sales applications. Application A is integrated with application B if non-critical features of A will not work without the implementation of B.

Application or Module	Application(s) with Integration Points
Accounts Receivable	OSO, OFSL, OTS
Bill of Materials	OSO, OFSL, OTS
Collections	OSO, OFSL, OTS
Configurator	OSO, OFSL, OTS
CRM Foundation Fulfillment	OSO, OFSL, OTS
CRM Foundation Notes	OSO, OFSL, OTS
CRM Foundation Task Manager	OSO, OFSL, OTS
CRM Foundation Territory Manager	OSO, OFSL, OTS
Interaction Center	OSO, OFSL, OTS
Interaction History	OSO, OFSL, OTS
Inventory	OSO, OFSL, OTS
iStore	OSO, OFSL
Marketing Encyclopedia	OSO, OFSL, OTS
Oracle Marketing Online	OSO, OFSL, OTS
Order Capture	OSO, OFSL, OTS

Application or Module	Application(s) with Integration Points
Order Management	OSO, OFSL, OTS
Partner Relationship Management	OSO, OFSL, OTS
Sales Compensation	OSO, OFSL, OTS
TeleService	OSO, OTS
Universal Work Queue	OTS

4

Implementation Overview

This implementation overview provides a checklist of mandatory and optional steps needed to implement the following products: Oracle Sales Online, Oracle TeleSales, Oracle Field Sales / Laptop, Oracle Field Sales / Palm, and Oracle Field Sales / Wireless.

- Preinstallation Steps (See Section 4.1 on page 4-1.)
- Checklist for Sales Online (See Section 4.2.1 on page 4-2.)
- Checklist for TeleSales (See Section 4.2.2 on page 4-4.)
- Checklist for Field Sales / Laptop (See Section 4.2.3 on page 4-7.)
- Checklist for Field Sales / Palm (See Section 4.2.4 on page 4-8.)
- Checklist for Field Sales / Wireless (See Section 4.2.5 on page 4-9.)

4.1 Preinstallation Steps

Of the Sales Family of eBusiness Suite applications, only Oracle Sales Online requires preinstallation of the XML Parser for PL / SQL (plxmlparserV1_0_1.zip).

4.2 Checklists of Implementation Steps

This topic provides you with a checklist of implementation steps for Oracle Sales Online, Oracle TeleSales, Oracle Field Sales / Laptop, Oracle Field Sales / Palm, and Oracle Field Sales / Wireless. At end of this section you will find a combined check list the entire Sales Family of eBusiness Suite applications.

You can find more information on each step by clicking on a hyperlink, or, for the printed and PDF versions, following the page reference.

4.2.1 Checklist of Implementation Steps for Sales Online

The implementation steps for Sales Online are outlined in the table below. Please print a copy of this list to use as a guide to the specific implementation steps detailed in the next chapter of this document.

Mandatory	Description
Yes	Create organization and locations (See Section 5.1 on page 5-1.)
Yes	Set up customer model (See Section 5.2 on page 5-2.)
Yes	Set up global address formatting and address validation (See Section 5.5 on page 5-16.)
Yes	Create employees (See Section 5.6 on page 5-18.)
Yes	Set up users, security, and reporting hierarchy (See Section 5.7 on page 5-19.) Define resource groups (SeeSection 5.7.2 on page 5-32.) Set up employees as users (See Section 5.7.3 on page 5-33.) Import employees and assign roles and resource groups (See Section 5.7.4 on page 5-34.) Set up system profile options (See Section 5.7.5 on page 5-37.) Set up default user role and sales group (See Section 5.7.6 on page 5-40.) Create a custom responsibility (See Section 5.7.7 on page 5-40.)
Yes	Set up lead management (See Section 5.8 on page 5-41.) Set up lead status (See Section 5.8.3 on page 5-43.) Set up lead qualification (See Section 5.8.4 on page 5-44.) Set up automatic lead assignment (See Section 5.8.5 on page 5-45.) Set up automatic lead ranking (See Section 5.8.6 on page 5-49.) Set up lead score card (See Section 5.8.7 on page 5-50.) Set up lead rank mapping (See Section 5.8.8 on page 5-52.) User hook for a custom lead ranking engine (See Section 5.8.9 on page 5-53.) Set up lead system profiles (See Section 5.8.10 on page 5-54.)
No	Import leads (See Section 5.9 on page 5-60.)

Mandatory	Description
Yes	Set up opportunities and forecasting (See Section 5.10 on page 5-114.) Create win probabilities (See Section 5.10.2 on page 5-116.) Define or modify sales stages (See Section 5.10.3 on page 5-117.) Set up sales methodology (See Section 5.10.4 on page 5-118.) Set up the calendar (See Section 5.10.5 on page 5-120.) Define credit types in Order Management (See Section 5.10.6 on page 5-121.) Set up opportunity status (See Section 5.10.7 on page 5-121.) Set up interest types (See Section 5.10.8 on page 5-123.) Setting up interest codes (See Section 5.10.9 on page 5-124.) Set up plan element mapping (See Section 5.10.10 on page 5-125.) Load inventory categories (See Section 5.10.11 on page 5-126.)
No	Set up multiple currencies (See Section 5.11 on page 5-127.) Set up calendar types (See Section 5.11.1 on page 5-128.) Set up accounting calendar (See Section 5.11.2 on page 5-129.) Set up the default currency and selecting the calendar (See Section 5.11.3 on page 5-130.) Set up type mapping (See Section 5.11.4 on page 5-131.) Set the profile options for multiple currencies (See Section 5.11.5 on page 5-131.) Set up reporting currency mapping (See Section 5.11.6 on page 5-131.) Enter GL daily conversion rates (See Section 5.11.7 on page 5-132.) Enter currency conversion dates for periods (Pseudo Period Rates.). (See Section 5.11.8 on page 5-133.) Define conversion rates for periods (See Section 5.11.9 on page 5-134.) Run Concurrent Programs (See Section 5.11.10 on page 5-135.) Set up forecast category mapping (See Section 5.11.11 on page 5-135.) Set up budget/revenue (See Section 5.11.12 on page 5-136.)
No	Setup quoting (See Section 5.12 on page 5-138.)
	Set up flexfields (See Section 5.13 on page 5-139.)
	Set up the home page (See Section 5.14 on page 5-140.)
No	Set up menu administration (See Section 5.15 on page 5-147.)

Mandatory	Description
No	Set up CRM Foundation Modules (See Section 5.16 on page 5-148.) Set up notes (See Section 5.16.1 on page 5-149.) Set up interaction tracking (See Section 5.16.2 on page 5-149.) Set up tasks (See Section 5.16.3 on page 5-149.) Set up calendar (See Section 5.16.4 on page 5-150.) Set up fulfillment (See Section 5.16.5 on page 5-150.) Set up territories (See Section 5.16.6 on page 5-150.) Set up real time territory assignment (See Section 5.16.7 on page 5-154.)
No	Create custom JSP pages
No	Set up Partners Online (See Section 5.18 on page 5-158.)
No	Set up marketing source codes (See Section 5.19 on page 5-159.)
No	Set up Marketing Encyclopedia System (See Section 5.20 on page 5-160.)
No	Set up Incentive Compensation (See Section 5.21 on page 5-160.)
No	Set up Opportunity Exchange (See Section 5.22 on page 5-160.)

4.2.2 Checklist of Implementation Steps for Oracle TeleSales

The implementation steps for Oracle TeleSales are outlined in the table below. Please print a copy of this list to use as a guide to the specific implementation steps detailed in the next chapter of this document.

Mandatory	Description
Yes	Create organization and locations. (See Section 5.1 on page 5-1.)
Yes	Set up customer model. (See Section 5.2 on page 5-2.)
Yes	Set up classifications for customers. (See Section 5.3 on page 5-2.)
Yes	Set up relationships for parties in the database. At minimum, you must make sure that the Create Party flag is set to Y for all of the relationships you use. (See Section 5.4 on page 5-5.)
Yes	Set up global address formatting and address validation. (See Section 5.5 on page 5-16.)
Yes	Create employees. (See Section 5.6 on page 5-18.)

Mandatory	Description
Yes	Set up users, security, and reporting hierarchy. (See Section 5.7 on page 5-19.) Define resource groups. (SeeSection 5.7.2 on page 5-32.) Set up employees as users. (See Section 5.7.3 on page 5-33.) Import employees and assign roles and resource groups. (See Section 5.7.4 on page 5-34.) Set up system profile options. (See Section 5.7.5 on page 5-37.) Set up default user role and sales group. (See Section 5.7.6 on page 5-40.) Create a custom responsibility. (See Section 5.7.7 on page 5-40.)
Yes	Set up lead management. (See Section 5.8 on page 5-41.) Set up lead status. (See Section 5.8.3 on page 5-43.) Set up lead qualification. (See Section 5.8.4 on page 5-44.) Set up automatic lead assignment. (See Section 5.8.5 on page 5-45.) Set up automatic lead ranking. (See Section 5.8.6 on page 5-49.) Set up lead score card. (See Section 5.8.7 on page 5-50.) Set up lead rank mapping. (See Section 5.8.8 on page 5-52.) User hook for a custom lead ranking engine. (See Section 5.8.9 on page 5-53.) Set up lead system profiles. (See Section 5.8.10 on page 5-54.)
No	Import leads. (See Section 5.9 on page 5-60.)
Yes	Set up opportunities and forecasting. (See Section 5.10 on page 5-114.) Create win probabilities. (See Section 5.10.2 on page 5-116.) Define or modify sales stages. (See Section 5.10.3 on page 5-117.) Set up sales methodology. (See Section 5.10.4 on page 5-118.) Set up the calendar. (See Section 5.10.5 on page 5-120.) Define credit types in Order Management. (See Section 5.10.6 on page 5-121.) Set up opportunity status. (See Section 5.10.7 on page 5-121.) Set up interest types. (See Section 5.10.8 on page 5-123.) Setting up interest codes. (See Section 5.10.9 on page 5-124.) Set up plan element mapping. (See Section 5.10.10 on page 5-125.) Load inventory categories. (See Section 5.10.11 on page 5-126.)

Mandatory	Description
No	Set up multiple currencies.(See Section 5.11 on page 5-127.) Set up calendar types.(See Section 5.11.1 on page 5-128.) Set up accounting calendar.(See Section 5.11.2 on page 5-129.) Set up the default currency and selecting the calendar. (See Section 5.11.3 on page 5-130.) Set up type mapping. (See Section 5.11.4 on page 5-131.) Set the profile options for multiple currencies. (See Section 5.11.5 on page 5-131.) Set up reporting currency mapping. (See Section 5.11.6 on page 5-131.) Enter GL daily conversion rates. (See Section 5.11.7 on page 5-132.) Enter currency conversion dates for periods. (Pseudo Period Rates.). (See Section 5.11.8 on page 5-133.) Define conversion rates for periods. (See Section 5.11.9 on page 5-134.) Run Concurrent Programs. (See Section 5.11.10 on page 5-135.) Set up forecast category mapping. (See Section 5.11.11 on page 5-135.) Set up budget/revenue. (See Section 5.11.12 on page 5-136.)
No	Setup quoting. (See Section 5.12 on page 5-138.)
No	Set up flexfields. (See Section 5.13 on page 5-139.)
No	Set up CRM Foundation Modules. (See Section 5.16 on page 5-148.) Set up notes. (See Section 5.16.1 on page 5-149.) Set up interaction tracking. (See Section 5.16.2 on page 5-149.) Set up tasks. (See Section 5.16.3 on page 5-149.) Set up calendar. (See Section 5.16.4 on page 5-150.) Set up fulfillment. (See Section 5.16.5 on page 5-150.) Set up territories. (See Section 5.16.6 on page 5-150.) Set up real time territory assignment. (See Section 5.16.7 on page 5-154.)
No	Set up Partners Online. (See Section 5.18 on page 5-158.)
No	Set up marketing source codes. (See Section 5.19 on page 5-159.)
No	Set up the Marketing Encyclopedia System. (See Section 5.20 on page 5-160.)
No	Set up Incentive Compensation. (See Section 5.21 on page 5-160.)
No	Se up the profile option for Quick Menu. (See Section 5.23 on page 5-162.)

Mandatory	Description
No	Customize the interface by setting default tabs and hiding tabs. (SeeSection 5.24 on page 5-162.)
No	Set up custom tabs. (See Section 5.25 on page 5-164.)
No	Set up the ability to launch HTML-based applications. (See Section 5.26 on page 5-166.)
No	Set up the ability of agents to view maps for addresses via integration with a mapping application. (See Section 5.27 on page 5-166.)
Yes	Set up the Universal Work Queue. (See Section 5.28 on page 5-167.)
No	Set up marketing events using Oracle Marketing Online. (SeeSection 5.29 on page 5-168.)
No	Set up marketing collateral. (See Section 5.30 on page 5-169.)
No	Set up scripting. (See Section 5.31 on page 5-172.)
No	Set up call center applications. (See Section 5.32 on page 5-172.)
No	Assign campaign schedules (source codes) to agents. (See Section 5.33 on page 5-172.)
No	Enable interaction tracking and set up automatic interaction tracking and wrap-up. (See Section 5.34 on page 5-175.)
No	Enable web directory assistance. (See Section 5.35 on page 5-184.)

4.2.3 Checklist of Implementation Steps for Field Sales/Laptop

The following table lists the steps required to implement Oracle Field Sales/Laptop:

Mandatory	Description
Yes	Install Oracle Sales Online Release 11i and verify that Sales Online and its prerequisite products and dependencies are properly installed. (See Section 4.2.1 on page 4-2.)
Yes	Check post installation steps on the Applications Database. (See Section 5.36.1 on page 5-187.) Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide Release 11i*
Yes	Set up the Mobile Device Gateway (MDG) (See Section 5.36.2 on page 5-187.) Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide*

Mandatory	Description
Yes	Download and install MDG patches for Gateway (See Section 5.36.3 on page 5-188.) Reference: *www.oracle.com/support/metalink*
Yes	Install Oracle 9i Lite Synchronization Server (See Section 5.36.4 on page 5-188.) Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i*
Yes	Publish Oracle CRM Mobile Foundation to Gateway Server (See Section 5.36.5 on page 5-188.)
Yes	Publish Field Sales / Laptop (See Section 5.36.6 on page 5-189.) Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i*
Yes	Administer the Mobile Device Gateway (See Section 5.36.7 on page 5-189.) Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide*
Yes	Set up Mobile Users (See Section 5.36.8 on page 5-189.)
Yes	Give Access to Users (See Section 5.36.9 on page 5-191.)
Yes	Install the Application on a Laptop (See Section 5.36.10 on page 5-191.)

4.2.4 Checklist of Implementation Steps for Field Sales/Palm

The implementation steps for Oracle Field Sales / Palm are outlined in the table below. Please print a copy of this list to use as a guide to the specific implementation steps detailed in the next chapter of this document.

Mandatory	Description
Yes	Install Oracle Sales Online Release 11i and verify that Sales Online and its prerequisite products and dependencies are properly installed. (See Section 4.2.1 on page 4-2.)
Yes	Publish Oracle Field Sales / Palm TM Devices onto Web to Go (See Section 5.37.1 on page 5-196.) Reference: *Oracle 9i Lite Publishing, Managing, and Deploying Guide, Release 5.0*
Yes	Set up mobile users (See Section 5.37.2 on page 5-196.)
Yes	Give access to users (See Section 5.37.3 on page 5-197.)

Mandatory	Description
Yes	Download and install Consolidator, Oracle 9i Lite and Bootstrap (See Section 5.37.4 on page 5-197.)
Yes	Perform a Hotsync of all iConnect Palm Components (See Section 5.37.5 on page 5-198.)
Yes	Configure Windows Remote Application Server (RAS) (See Section 5.37.6 on page 5-198.)
Yes	Create a Remote Application Server (RAS) User Account for the Palm Device (See Section 5.37.7 on page 5-202.)
Yes	Configure the Palm Device (Palm OS 3.5 and 4.0) (See Section 5.37.8 on page 5-202.)
Yes	Configure and Execute the iConnect Consolidator Client on Palm Computing Platform Devices (See Section 5.37.9 on page 5-206.)

4.2.5 Checklist of Implementation Steps for Field Sales/Wireless

Mandatory	Description
Yes	Install Oracle Sales Online Release 11i and verify that Sales Online and its prerequisite products and dependencies are properly installed. (See Section 4.2.1 on page 4-2.)
Yes	Set Up Field Sales / Wireless User (See Section 5.38.1 on page 5-208.)
Yes	Set Up Wireless Edition Server (See Section 5.38.2 on page 5-209.) Reference: *Oracle's 9i Application Server Wireless Edition Installation Guide*
No	Create Master Documents for Fulfillment. (See Section 5.38.3 on page 5-209.) *This step is only needed if you want to use the Fulfillment features. Reference: *Oracle CRM Foundation Concepts and Procedures guide, Administering Fulfillment section*

5

Implementing Oracle Sales Applications

This group of topics tells you how to set up the sales family of Oracle eBusiness Suite of applications. These topics are listed in the suggested implementation order.

Each step lists the products which require that particular step. If the product you are implementing is not listed, you can safely skip the step. For a complete checklist of steps for your product, please see checklist of implementation steps in Chapter 4, "Implementation Overview".

5.1 Creating Organizations and Locations in Oracle HRMS

Forms Navigation:

HRMS Setup > Organization

Applies to: Sales Online, TeleSales, Field Sales/Laptop

Set up organizations in Oracle HRMS to record the physical locations where your employees work and all the different departments and sections which make up your enterprise. A default business organization has been set up for you, so this step is not required for sales applications to be fully operational. However, you must set up organizations if you plan to use any financial ERP application in the future.

Organizations can also help you set up security for your sales applications. For example, you can attach responsibilities with different levels of security to the different operating units you set up as organizations. Any individuals employed in those units automatically inherit that responsibility.

See the Organization Management chapter in the *Using Oracle HRMS -- The Fundamentals* for detailed setup steps and *Multiple Organizations in Oracle Applications.*

5.2 Setting Up The Customer Model

Applies to: Sales Online, TeleSales, Field Sales/Laptop

You must set up the system profiles and lookups the agents will use in entering customer records in your sales application. These include, the forms of address, titles, and so on.

Follow the instructions in the Customers chapter of *Oracle Receivables User Guide* for more details.

5.3 Setting Up Classifications

Applies to: Sales Online, TeleSales, Field Sales/Laptop

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 you 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.

Forms Navigation

Administration > Administration

HTML 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. If you wish 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.

5.4 Setting Up Relationships

Applies to: Sales Online, TeleSales, Field Sales/Laptop

Oracle sales applications come configured to capture both business and personal relationships between any parties in the database and between outside parties and your internal organizations.

You must make sure each relationship your implementation uses has the Create Party (CREATE_PARTY) flag set to Y. Follow the steps described in Table 5.4.3,

"Setting Up Relationships for Customers Upgrading from Previous Releases" on page 5-15.

You can also:

- Modify or add to the list of relationships. See Section 5.4.1, "Modifying Seeded Relationships".
- Specify where these relationships can be used and set up any reciprocal relationships. Section 5.4.2, "Setting Up Relationships Usage and Reciprocal Relationships".

About Relationships in Sales Applications

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.

A relationship consist of:

1. An entry in the Oracle Receivables extensible lookup PARTY_RELATIONS_TYPE. The lookup code entered here includes the meaning the user sees in the list of values.
2. Setup for each relationship using the administration user interface as described in Section 5.4.2, "Setting Up Relationships Usage and Reciprocal Relationships". This setup includes.
   - Specification of where the relationship can be used.
   - Any reciprocal relationship the application is to capture when an agent selects the relationship.

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 what party type can be used 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.

About Setting Up The Automatic Capture Of Reciprocal Relationships.

Most relationships, such as "father of" and "subsidiary of", describe the relationship between the two parties in the database in only one direction. To capture a relationship fully, the database must also capture the reciprocal relationship.

For example, if an agent specifies that John is the father of Mary, then you want Mary's record to reflect the fact that Mary is the daughter of John. That way you can target a promotion to all children in your database on Father's day, for example.

Oracle sales applications can supply the reciprocal relationships for the agent automatically. Many of the reciprocal relationships are already seeded for you, but you can add your own.

5.4.1 Modifying Seeded Relationships

Relationships are stored in the extensible lookup PARTY_RELATIONS_TYPE. You can modify this Oracle Receivables lookup using the standard procedure for modifying lookups (quick codes) described in *Oracle Applications Administrator's Guide*. You can:

- Modify the wording of the relationship in the Meaning column. This will change what the agent sees in the sales application's user interface.
- Disable any seeded relationship by deselecting the Enabled check box.
- Add relationships of your own. If you add new relationships to this lookup, you must remember to set up their usage according to the procedure described in Section 5.4.2, "Setting Up Relationships Usage and Reciprocal Relationships". If you do not, they will not be available for use.

The following table lists all of the seeded relationship codes for the lookup PARTY_RELATIONS_TYPE with an explanation for each:

Code	Explanation
ADVERTISER	Advertiser
AFFILIATE_TO	Affiliate
AGREEMENT_SIGNER_OF	The party that signs agreements on behalf of another party
AUNT_OF	Aunt
BENEFICIARY_OF	Beneficiary
BILL_CONSOLIDATOR_FOR	Bill Consolidator For
BILL_CONSOLIDATOR_AT	Bill Consolidator At
BILL_PRESENTER_FOR	Bill Presenter For
BILL_PUBLISHER_AT	Bill Publisher At
BILL_PUBLISHER_FOR	Bill Publisher For
BILLER_AT	When an organization is a registered biller.
BILLER_FOR	Biller For
BILLTO_OF	The alternate billing party for the buyer.
BOARD_MEMBER_OF	Board Member
BROTHER_OF	Brother
BUSINESS_PARTNER_FOR	Business Partner
CEO_OF	CEO
CFO_OF	CFO
CHANNEL_FOR	Channel
CIO_OF	CIO
COMPETITOR_OF	Competitor
CONSULTANT_FOR	Consultant
CONTACT_OF	Contact
COUSION_OF	Cousin
CUSTOMER_OF	Customer
DAUGHTER_OF	Daughter

Code	Explanation
DEPENDENT_OF	Dependent
DIVISION_OF	Division
DOMESTIC_ULTIMATE_OF	Domestic Ultimate of
EMPLOYEE_OF	Employee
FATHER_OF	Father
FIELD_SERVICE_PROVIDER_FOR	Field Service Provider
GENERAL_EMPLOYEE_OF	General Employee
GLOBAL_ULTIMATE_OF	Global Ultimate of
GUARANTOR_FOR	Guarantor
GUARDIAN_OF	Guardian
HEADQUARTERS_OF	Headquarters of
KEY_DECISION_,MAKER_FOR	Key Decision Maker
LEGAL_COUNSEL_FOR	Legal Counsel
MEMBER_OF	Member
MOTHER_OF	Mother
OWNED_BY	Owned
PARENT_OF	Parent
PARTNER_OF	Partner
PARENT_OF	Parent
PAYFROM_OF	The alternate party to pay for a buyer.
PAYTO_OF	The alternate payee name for the seller.
PUBLISHER	Publisher
REPAIR_DEPOT_PROVIDER_FOR	Repair Depot Provider
REPORTS_TO	Reports To
SELLER_FOR	Seller
SELLER_FOR	Seller
SHIPTO_OF	The alternate shipping party for the buyer
SIBLING_OF	Sibling

Code	Explanation
SISTER_OF	Sister
SON_OF	Son
SPOUSE_OF	Spouse
STOCK_HOLDER_OF	Stock Holder
STUDENT_OF	Student
SUBSIDIARY_OF	Subsidiary
UNCLE_OF	Uncle
VENDOR_OF	Vendor

5.4.2 Setting Up Relationships Usage and Reciprocal Relationships

Use this procedure to:

- Select what party type can be used with relationships you have added to the lookup PARTY_RELATIONS_TYPE.
- Set up the automatic capture of reciprocal relationships

Forms Navigation

Administration > Administration

HTML Navigation

Administration > General > Customer Administration > Relationship

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.

Guidelines

The following table lists all seeded relationships including reciprocal relationships.

A relationship with an entry in the Reverse Relationship column is a reciprocal relationship.

Each row of the table consists of the following columns:

- **Relationship**: This is the relationship from PARTY_RELATIONS_TYPE that agents use to capture a relationship between two parties in the database.
- **Reverse Relationship**: This is the relationship that is recorded automatically by the application when the agent selects the Relationship field. If this field is blank, then no reciprocal relationship is captured.
- **Subject Type**: This specifies which party type can be the subject of the relationship. This is the first of the two columns that specify the parties that can use the relationship. For example, for the "Member of" relationship, the entry in this column is Person. This means that agents can only use this relationship for parties of Person. Agents recording a relationship for organizations will not see "Member of" in the list of values.
- **Object Type**: This specifies which party type can be the object of the relationship. This is the second of two columns that restrict the use of a relationship. For example, for the "Member of" relationship, the entry in this

column is Organization. This means that agents can only use this relationship between Persons and Organizations. Agents recording a relationship between two organizations or between two persons will not see "Member of" in the list of values.

Relationship	Reverse Relationship	Subject Type	Object Type
Affiliate to		Organization	Organization
Agreement signer of		Organization	Organization
Associate of	Associate of	Person	Person
Beneficiary of	Benefactor of	Person	Person
Benefactor of	Beneficiary of	Person	Person
Beneficiary of	Benefactor of	Organization	Person
Benefactor of	Beneficiary of	Person	Organization
Board member of		Person	Organization
Competitor of	Competitor of	Organization	Organization
Contact of		Person	Organization
Contact of		Person	Person
Customer of	Seller to	Person	Organization
Seller to	Customer of	Organization	Person
Customer of	Seller to	Organization	Organization
Seller to	Customer of	Organization	Organization
Dependent of	Guardian of	Person	Person
Guardian of	Dependent of	Person	Person
Division of	Headquarters of	Organization	Organization
Headquarters of	Division of	Organization	Organization
Domestic ultimate of	Domestic subsidiary of	Organization	Organization
Domestic subsidiary of	Domestic ultimate of	Org	Org
Employee of	Employer of	Person	Organization
Employer of	Employee of	Organization	Person
Global ultimate of	Global subsidiary of	Organization	Organization

Relationship	Reverse Relationship	Subject Type	Object Type
Global subsidiary of	Global ultimate of	Organization	Organization
Guarantor for	Dependent of	Organization	Organization
Dependent of	Guarantor for	Organization	Organization
Member of	Contains member	Person	Organization
Contains member	Member of	Organization	Person
Member of	Contains member	Person	Group
Contains member	Member of	Group	Person
Member of	Contains member	Organization	Group
Contains member	Member of	Group	Organization
Parent of	Child of	Person	Person
Child of	Parent of	Person	Person
Partner of	Partner of	Organization	Organization
Payfrom of		Organization	Organization
Payto of		Organization	Organization
Repair depot provider for		Organization	Organization
Reports to	Manager of	Person	Person
Manager of	Reports to	Person	Person
Shipto of		Organization	Organization
Sibling of	Sibling of	Person	Person
Spouse of	Spouse of	Person	Person
Stock holder of		Person	Organization
Stock holder of		Organization	Organization
Student of		Person	Organization
Subsidiary of	Parent of	Organization	Organization
Parent of	Subsidiary of	Organization	Organization
VAD of		Organization	Organization
Relative of	Relative of	Person	Person

Relationship	Reverse Relationship	Subject Type	Object Type
Domestic partner of	Domestic partner of	Person	Person
Var of		Organization	Organization

5.4.3 Setting Up Relationships for Customers Upgrading from Previous Releases

If you are upgrading your sales application from previous releases, you must make sure that all relationships your implementation is using have the Create Party check box set to Yes. Use the following procedure to ensure all relationships are set up correctly.

> **Note:** Please check Metalink to see if a script is available for you to update this flag automatically.

Forms Navigation

Administration > **Administration**

HTML Navigation

Administration > General > Customer Administration > Relationship

Steps

On the Relationships page, the Relationships table lists the available relationships.

1. For each relationship in the table used by your implementation:
   a. Select the link for a relationship.

      The Relationship Detail page appears.
   b. Make sure that the Create Party check box is selected.
   c. Click **Update**.
2. Bounce your Apache server when you are done.

5.5 Setting Up Global Address Formatting and Address Validation

Applies to: Sales Online, TeleSales

To ensure that your customer quotes and invoices include the proper tax information, you must set up addresses in Oracle Receivables under the Receivables Manager responsibility.

Note: Oracle Sales Online uses global address formatting and address validation while Oracle TeleSales only uses address validation.

You must complete the steps in both the Flexible Address and the Address Validation sections of the Customers chapter of the *Oracle Receivables User Guide*. The differences between the Oracle Receivables setups and the setup for sales applications is outlined below.

Oracle applications let you enter customer addresses in country–specific formats. For example, if you have customers in Germany, you can enter German addresses in the format recommended by the Bundespost, or you can enter addresses for customers in the United Kingdom in the format recommended by the Royal Mail.

This is done by using descriptive flexfields to enter and display address information in the appropriate formats. The flexfield window opens if the country you enter has a flexible address style assigned to it. This window lets you enter an address in the layout associated with that country. If there is no address style associated with the country, then the system uses the value in OS: Default Address Style instead of the standard form mentioned in the Oracle Receivables documentation.

Setting up address validation ensures that the addresses entered into the database are in the correct format according to the different formats you have set up.

There are six preset address formats that are available for your use:\

- Japan
- Northern Europe
- South America
- Southern Europe
- UK/Africa/Australasia
- United States of America

You must make sure that each country you are doing business with is mapped to the appropriate address style. Use the following procedure to map address styles.

Forms Navigation

Receivables Manager > Countries

Steps

1. Navigate to the Countries and Territories window.
2. Search for the countries you wish to set up using the Query/Enter Query/Run method.
3. Use the Address Style List of Values (LOV) to select the address style for each country.
4. Click **Save** on the toolbar.

5.5.1 Differences Between Oracle Receivables and Sales Setups

What follows is a list of differences between the setup required by sales applications and those you must perform as described in the Customers chapter of the *Oracle Receivables User Guide*:

- Descriptive Flexfield details:

  DESCRIPTIVE FLEXFIELD NAME: Remit Address HZ

  Title: Address

  Application: Oracle Receivables

  Table: HZ_LOCATIONS

- Additional profile option for Default Country behavior: OSO: Default Country.
- If there is no address style associated with a country, then sales applications use the setting of OS: Default Address Style as the default address style instead of the standard address format in Oracle Receivables. The seeded default value of this option is AS_DEFAULT.
- Sales applications include the following additional address style in addition to the address styles provided by Oracle Receivables:

  Oracle Sales Default Address Style: AS_DEFAULT (This is set as the default for the profile option OS: Default Address Style)

  The following table lists the columns for the AS_DEFAULT style.

Table Name	Database Column
HZ_LOCATIONS	ADDRESS1
HZ_LOCATIONS	ADDRESS2
HZ_LOCATIONS	ADDRESS3
HZ_LOCATIONS	ADDRESS4
HZ_LOCATIONS	STATE
HZ_LOCATIONS	COUNTY
HZ_LOCATIONS	CITY
HZ_LOCATIONS	POSTAL_CODE

- The STATE segment uses the AS_LOC_STATE value set for the list of values. The list of values depends on the Sales Tax Location Flexfield setup in Oracle Receivables.

5.6 Creating Employees

Applies to: Sales Online, TeleSales, Field Sales/Laptop

You must create the individuals who will be using the sales application you are implementing as employees before you can set them up as users.

Follow the steps found in *Managing People Using Oracle HRMS Release 11i*, Chapter 1 - Employee Management, Special Information Types, Entering and Maintaining a New Person. Make sure that you enter `Employee` in the Category field.

The navigation paths for creating employees are different depending on whether you have a full license to Oracle HRMS or a shared license.

If you have the full installation of Oracle Human Resources, a module of Oracle HRMS, you must use HR and perform this step under the HRMS Manager responsibility.

5.6.1 With Full Oracle HRMS License

If you are setting up employees in Oracle HRMS, then you must log in under a separate responsibility.

Responsibility

HRMS Manager

Navigation

People > Enter and Maintain

5.6.2 With Shared Oracle HRMS License

Forms Navigation

CRM Foundation > Resource Manager > Maintain Employees > Employees

---

Note: If you have the full installation of Oracle HRMS then you cannot create employees under the Sales Administration Responsibility using CRM Foundation > Resource Manager > Maintain Employees > Employees. You will receive an error message that you must use HRMS.

5.7 Setting Up Users, Security, and Reporting Hierarchy

Applies to: Sales Online, TeleSales, Field Sales/Laptop

In this step you import the employees you have set up from Oracle Human Resources (HRMS), set them up as users, and define the roles, groups, and system profiles that determine who gets to view and modify customer, lead, and opportunity information.

This topic gives you an overview of the factors that affect security and user setup for sales applications and then gives you detail on each setup step.

Steps

1. Replicate the reporting hierarchy within your sales organization using Resource Groups in Resource Manager. This determines how forecasting of opportunity information is aggregated. See Section 5.7.2, "Defining Resource Groups" on page 5-32.
2. Set up the employees as users of your sales application. Section 5.7.3, "Setting Up Employees as Users" on page 5-33.

3. Import the employees you have created, give them manager or agent roles, and assign them to the resource groups you have created. See Section 5.7.4, "Importing Employees and Assigning Them Roles and Resource Groups" on page 5-34.
4. Set up the system profile options which, in combination with the resource groups and roles, determine what information employees can view and modify. See Section 5.7.5, "Setting Up System Profile Options to Give Users Access to Information" on page 5-37.
5. For Oracle TeleSales only, you can set up a default user role and sales group for employees with multiple roles and sales groups. This makes it possible for users to use your application without having to select a role and group first. See Section 5.7.6, "Setting Up Default User Role and Sales Group" on page 5-40.

5.7.1 Factors That Affect Security

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

Responsibilities

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

System Profile Options

System profile options determine the level of access provided by groups, roles, sales teams. Some system profile options can override all other access settings. For example, setting OS: Customer Access Privilege to Full means that employees can update customer information even when they are not on the customer’s sales team. Other system profile options merely refine the access set elsewhere. Setting the profile OS: Manager Update Access to *Update data*, for example, gives a manager access to the opportunities and leads of his or her suboordinates can access.

Customer Sales Teams

Sales teams can be attached to either a consumer (party of type Person) or an organization. Just how a sales team controls access to information and the ability to modify it is determined by the setting of the profile option OS: Customer Access Privilege.

For example, if you set OS: Customer Access Privilege to Full for a user or a group of users, then that user or group has access to all customer information. Those individuals do not get added to the customer sales team.

The sales team concept has most impact on employee access to information when the setting of this system profile is Sales Team. In this case:

- Only agents on a customer sales team have view and update access to customer information. In difference to opportunity and lead sales teams, customer sales teams give all sales team members both read and write access to customer information and the ability to add other sales team members.
- Users can control who has access to information on a customer sales team is by selecting the Keep check box next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.
- An agent on a sales team for an organization gains automatic access to all of the records of any consumer (Person) with a relationship to that organization. Users need not be on the sales teams for both the consumer and the organization. It is sufficient for them to be on the organization sales team to have access to personal information.
- Customer sales teams, unlike lead or opportunity sales teams, permit the customer record creator or sales team member to select a role for each sales team member. Selecting the role of Account Manager gives a sales team member the ability to view all of the opportunities and leads for the customer. The default setting of the Role field is controlled by the system profile option OS: Customer Sales Team Default Role Type.

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

Setting OS: Customer Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but allows everyone to view customer records even if they are not on the sales team.

Opportunity Sales Team

Just how a sales team controls access to information and the ability to modify it is determined by the setting of the profile option OS: Opportunity Access Privilege.

For example, if you set this profile to Full for a particular user or group of users, then that user or group gains access to opportunities and can modify them. These individuals are not added to the opportunity sales team.

Membership on an opportunity sales team, becomes important when OS: Opportunity Access Privilege is set to Sales Team. In this case:

- Sales team members are assigned either automatically, by the Territory Manager module, or manually, by the creator of the opportunity. The creator of an opportunity is automatically put on the sales team with full modification privileges.
- All agents on an opportunity sales team have view access, but to allow them to make changes the opportunity creator must select the Full Access check box next their names. Members with an unselected check box have read-only access.
- Sales team members can control who has access to information on the opportunity sales team is by selecting the Keep check box next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.

Setting OS: Opportunity Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but allows everyone to view opportunities even if they are not on the sales team.

Lead Sales Team and Owner Assignment

Just how a sales team controls access to information and the ability to modify it is determined by the setting of the profile option OS: Lead Access Privilege. If the setting of this profile is Full at the site level, then all employees can access and modify the lead.

Membership on the sales team and lead ownership become important when this profile is set to Sales Team. In this case:

- Only sales team members and agents assigned the role of Account Manager can view the lead. Only those sales team members who have the Full check box checked next to their name can update the lead.
- The owner of the lead gains both read and write access automatically. In addition, the lead owner is the only person who can change lead ownership. Implementers can grant other sales team members the ability to reassign

ownership by setting the profile OS: Privilege to Change Lead Owner to Yes. These individuals must have write access.

- Leads can be either assigned by the lead creator or current owner manually or automatically via a work flow program.

  The automatic lead assignment program uses the same territories as the Territory Manager. It assigns the first person in the territory as the lead owner and the rest as sales team members.

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

Setting OS: Lead Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but allows everyone to view leads even if they are not on the sales team.

The Territory Manager Module and Automatic Lead Assignment

The Territory Manager module is the CRM foundation module which permits you to create a hierarchy of sales territories. You run a concurrent program to assign opportunities and customers to those territories.

If you enable automatic lead assignment, then a call to the Territory Manager API assigns leads to the same territories you have set up in the Territory Manager each time the lead is updated. This happens automatically without having to run the concurrent territory assignment program. A workflow program then assigns the lead owner.

Both the Territory Manager and automatic assignment affect an individual’s access to information only to the extent sales teams do.

Groups (Resource Manager)

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

- How opportunity information is rolled up.

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

- Access to information created by subordinates.

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

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

Roles (Resource Manager)

Within sales applications there are three seeded role types. You must assign at least one of these roles to every employee using Resource Manager.

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

Here are the three available roles:

- **Administrator**: Users with this role can view customers, leads, and opportunities created by members of their group and for all subordinate groups. A user with this role cannot create customers, opportunities, or sales leads. Whether the administrator can modify any existing data depends on the setting of the profile option OS: Sales Admin Update Access.
- **Manager**: Allows users with this role access to all opportunities, leads, and customer information accessible to their group and all of the groups subordinate to this one in the hierarchy. Whether a manager can update information created by subordinates depends on the setting of the system profile option OS: Manager Update Access.
- **Agent or Representative**: Allows users with this role to view lead, opportunity, and customer information.

Just what level of access these roles provide depends on the setting of profiles OS: Customer Access Privilege, OS: Sales Leads Access Privilege, and OS: Opportunity Access Privilege. These profiles can override any restrictions based on roles.

Sample Security Setup for Oracle TeleSales

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

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

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

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

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

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

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

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

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

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

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

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

In the eBusiness center Mr. Ramos is restricted to viewing only those leads, opportunities, and customers where he is on the sales team. Presence on a customer lead team grants him automatic update privilege. But to be able to update leads he must be the lead owner or have the Full Access check box selected next to his name on the list of team members. He can modify only those opportunities where he is on the sales team and has the Full Access check box selected next to his name.

Case 2: Restricted Access for Both Managers and Sales Representatives

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

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

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

Now Ms. Pierce can view only those customer, opportunity, and lead records where she is on the sales team. If she is on the customer sales team, she can automatically modify the customer record. For an opportunities and leads, she can only update those records where she has the Full Access check box selected next to her name. If she is designated as the owner of a lead, she can also reassign the lead to someone else.

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

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

Effects of Different Settings

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

Access to Customer Information

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

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

Sales Team	Employees with any role can view customer information if they are on the sales team.	Employees with Manager and Agent or Rep roles can create customers. The Administrator role cannot create customers.	Employees with all roles can update customer information provided they are on the sales team. Employees with the Manager role can access customer information for their subordinates. If OS: Manager Update Access is set to *Update data*, the managers can update any customer information their subordinates can view. If this system profile is set to *Inherit data*, then the managers can only update information their subordinates can update.

Access to Opportunity Information

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

This table also assumes that the profile OS: Enable Customer LOV Security is set to ‘Yes’. If this profile is set to ’No’, then all users can create opportunities for any customer and retain the ability to update the opportunities they have created.

OS: Opportunity Access Privilege Setting	Who Can View	Who Can Create	Who Can Update
Org Full (Full access by HR organization).	Employees with any role can view opportunities for their HR organization. All can view any opportunity where they are on the sales team.	Employees with the Manager and Agent or Rep roles can create an opportunity provided they are on the sales team for the opportunity’s customer. Administrator roles cannot create opportunities.	Employees with any of the three Resource Manager roles can update opportunities accessible from their HR organization. All can update opportunities when they are on the sales team and have the Full Access check box selected.
Global Full	All employees with any role.	Employees with the Manager and Agent or Rep roles can create an opportunity provided they are on the sales team for the opportunity’s customer. Administrator roles cannot create opportunities.	All employees with any role.

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

Access to Sales Leads

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

This table also assumes that the profile OS: Enable Customer LOV Security is set to ‘Yes’. If this profile is set to ’No’, then all users can create leads for any customer and retain the ability to update the leads they have created.

This release introduces the lead sales team concept in addition to the lead owner concept in previous releases. The security for leads is similar to opportunities except that there is no Org Full (Full access by HR organization) setting for OS: Lead Access Privilege.

Lead sales teams are different from opportunity sales teams in the following ways:

- If you are not a sales lead owner or owner doesn't exist among your subordinates, you cannot change the owner flag on the sales team.
- If sales lead access profile set to Full, you can update any sales leads.
- You can reassign the ownership of a lead only if you are the lead owner or if one of the people working for you in the sales group hierarchy is the lead owner. Implementers can grant other sales team members the ability to reassign ownership by setting the profile OS: Privilege to Change Lead Owner to Yes. These individuals must have write access.
- Full access flag is always checked for owner.

OS: Lead Access Privilege Setting	Who Can View	Who Can Create	Who Can Update
Full	All employees with any role.	Employees with the Manager, Agent, and Representative roles can create a lead provided they are on the sales team for the customer. Administrator roles cannot create leads.	All employees with any role.

OS: Lead Access Privilege Setting	Who Can View	Who Can Create	Who Can Update
Prospecting	All employees with any role.	Employees with the Manager, Agent, and Representative roles can create a lead provided they are on the sales team for the customer. Administrator roles cannot create leads.	Employees with the Agent or Representative role can update the lead provided they are on the sales team with the Full Access check box selected. Employees with the role of Manager and the OS: Manager Update Access set to *Update data* can update the leads accessible to subordinates. A setting of *Inherit data* means they inherit the view and update privileges of their subordinates.
Sales Team	Employees with the Manager, Agent, and Representative roles can view a lead only when they are on the sales team. Employees with the Manager or Administrator roles can view the lead regardless of whether or not they are on the sales team provided a subordinate is on the sales team. Employees on the customer sales team who have been assigned the role of Account Manager can view the lead regardless of whether they are on the lead sales team or not.	Employees with the role of Agent or Representative can update the lead only when they are on the sales team and the Full Access check box is selected.	Employees with any role can update the lead provided they are on the lead sales team. Employees with the role of Manager and the OS: Manager Update Access set to *Update data* can update the leads accessible to their subordinates. A setting of *Inherit data* means they inherit the view and update privileges of their subordinates.

Access to Contact Information, Notes, Tasks, and Interactions

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

5.7.2 Defining Resource Groups

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

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

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

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

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

Forms Navigation

CRM Foundation > Resource Manager > Maintain Resources > Groups

Steps

1. In the Define Groups window, search for a resource group:
   a. Click **Find** on the application toolbar to open the Find Group window.
   b. Select a group name from the list of values in the Group Name field and click **Find.** The application populates the Results section with the group name search results.
   c. Select a group name in the Results table and click **OK**. The application populates the Define Groups window with the group information.
2. To create a new group:
   a. Enter a group name in the Group Name field.
   b. Enter a brief description of the group in the Group Description field.
   c. Enter the effective dates for the group in the **Start** and **End** fields.

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

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3. For each group in the hierarchy:

   a. Enter the group name.

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

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   b. Enter an optional description.

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

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

   ---

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

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

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

Reference

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

5.7.3 Setting Up Employees as Users

Use this procedure to set up individual employees as users for your sales application.

Steps

1. Log into Oracle Forms as System Administrator.
2. Navigate to **Security > User > Define**.

   The Users window appears.
3. Enter a user name and password. You are asked to reenter the password a second time.
4. Use the Person List of Values (LOV) to select the employee that will be using the user name and password.
5. Assign one or more responsibilities to the user. The available responsibilities are:
   - TeleSales Agent
   - TeleSales Marketing Agent
   - TeleSales Manager
   - TeleSales Administrator
   - Sales Online Representative
   - Sales Online Manager
   - Sales Online Administrator
6. Click **Save** in the toolbar.

Guidelines

Although the responsibilities have the same names as the roles you will assign in the next step, they perform a different function. Responsibilities are a general feature of all Oracle applications and control what features of the application a user can access. By contrast, the roles you set up in Resource manger control what customer, lead, and opportunity, information users can view and modify

5.7.4 Importing Employees and Assigning Them Roles and Resource Groups

Use this procedure to import employees from Oracle HRMS.

Prerequisites

You must set up the employees in HRMS first.

Forms Navigation

CRM Foundation > Resource Manager > Maintain Resources > Import Resources

Steps

The Selection Criterion window appears.

1. Select Employee from the **Resource Category** drop-down list.
2. If you are importing a single employee, then use the List of Values in the Name field. For groups of employees, search by job title, competency, or other search criteria.
3. Click **Search**.

   The employee(s) that match your search criteria are listed below.
4. Select the check boxes for the employees you wish to import as resources into your sales application. The next step will assign a single role to each of the selected resources.
5. Click **Create Resource**.

   The Default Values window appears.
6. Use the Role LOV to select one of the available roles to assign to the resource(s). See Roles (Resource Manager) on page 5-24 for an explanation of role types.

   Note: Sales roles apply to all sales applications discussed in this guide except for TeleSales. TeleSales roles are specific to TeleSales.

   For Oracle TeleSales the available roles are:

   - TeleSales Administrator
   - TeleSales Manager
   - TeleSales Agent

   For other sales applications, the available roles are:

   - Sales Manager
   - Sales Administrator
   - Sales Representative
7. Click **OK**.

The Selected Resources window appears. This window displays the list of employees about to be assigned the role.

8. If there are any the employees on the list you do not wish to receive this role, then deselect their Select check box.
9. Click **Save Resource**.

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

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

       The Resource window displays information about the employee.
    c. In the Group region of the Groups tab, use the Name LOV to assign a group to the employee.
    d. Use the Name LOV in the Group Member Role region to select one or more roles for this employee in the group.
    e. Click **Save** on the toolbar.
    f. Repeat the above three steps for each group to which you wish to assign the employee.

Guidelines

- While you can create custom roles, Oracle recommends that you use the seeded roles because they are tied to specific functionality in your sales application.
- You can assign a resource to multiple groups, but a group can have only one manager. Having multiple managers in a group will cause problems with forecasting rollups.
- If managers create and manage their own opportunities, then you must assign them both as managers and members of the group. You can do this by giving the manager both manager and representative roles. Either TeleSales Manager and TeleSales Agent for Oracle TeleSales or Sales Manager and Sales Representative for other sales applications.
- If you are moving sales agents from one group to another, do not remove them from their original group. Instead, click **Move** and add them to the new group. This will automatically end date their previous group membership.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager

5.7.5 Setting Up System Profile Options to Give Users Access to Information

Use this procedure to give your employees different levels of access to information by setting system profile options. These system profile options, in combination with the role and group each employee is assigned to, determine what information a user can view and modify.

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

Prerequisites

Familiarity with system profiles and concurrent programs.

Forms Navigation

Old Setup > System Profiles

Steps

1. Set the following profile options. These apply to all sales applications. (For detailed information of available settings, see the table of system profile options provided in this guide and the explanation of lead security in Section 5.7, "Setting Up Users, Security, and Reporting Hierarchy" on page 5-19.):
   - OS: Customer Access Privilege
   - OS: Opportunity Access Privilege
   - OS: Lead Access Privilege
   - OS: Privilege to Change Lead Owner
   - OS: Manager Update Access
   - OS: Sales Admin Update Access
2. If you are implementing Oracle Sales Online and want to give view-only access to individuals who are not granted access in the previous step, then you can set the profile options listed in this step.

   > **Note:** The OS profile options set in the previous step override the Sales Online-specific profiles listed in this step. If you granted a person access in the previous step, then you need not set any profile option here.

   The following three profiles control access to detail pages. Setting these profiles to Yes, gives users view-only access to opportunity, organization, and person detail pages:
   - OSO: Opportunity Detail Security Check
   - OSO: Organization Detail Security Check
   - OSO: Person Detail Security Check

   A setting of Yes to the following two profiles gives competitors and partners to view-only access to customer and opportunity details:
   - OS: View Partner Party Detail
   - OSO: Display Opportunity Competitors in Detail

3. If you are implementing Oracle Sales Online and you wish wish to restrict the Quick Find feature to only retreiving information users can access, then set OSO: Quick Find Security Check to Yes. This enables security for the Quick Find feature.

4. If you wish to restrict sales application users to creating opportunities only for customers they can view, then set the profile OS: Enable Customer LOV Security set to 'Yes'.

   Setting this profile to 'No' allows all users to create opportunities and sales leads for any customers. The users can update the opportunities and sales leads they have created.

5. Under the Oracle Sales Administrator responsibility, navigate to **Concurrent Requests > Run**.

6. Run the concurrent program Setup Checking for Sales Applications. Enter `No` when the Parameters window prompts you with the question: "Only for 11*i* upgrade?".

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

   The following table lists the possible error messages:

- No directory defined in utl_file_dir
- Default value is missing in profile 'OS: Customer Access Privilege'
- Default value is missing in profile 'OS: Sales Lead Access Privilege'
- Default value is missing in profile 'OS: Opportunity Access Privilege'
- Invalid combination of access privilege profiles.
- You cannot set OS: Customer Access Privilege to Sales Team and OS: Opportunity Access Privilege or OS: Lead Access Privilege to Full or Prospecting.
- Default value is missing in profile 'OS: Manager Update Access'
- Default value is missing in profile 'OS: Sales Admin Update Access'
- Default value is missing in profile 'OS: Default Opportunity Status'
- Default value is missing in profile 'OS: Default Opportunity Win Probability'
- Default value is missing in profile 'OS: Default Opportunity Sales Stage'

- Profile 'OS: Default Opportunity Sales Stage' has an invalid value
- Default value is missing in profile 'OS: Default Close Date Days'
- Currency 'xxx' should be defined in FND lookup with lookup_type 'REPORTING_CURRENCY'
- Default value is missing in profile 'OS: Forecast Sales Credit Type'
- Default value is missing in profile 'OS: Compensation Sales Credit Type'
- Default value is missing in profile 'OS: Default Sales Channel'
- Default value is missing in profile 'OS: Maximum Roll Days for Converting Amount'
- Default value is missing in profile 'OS: Date Mapping Type'
- Default value is missing in profile 'OS: Daily Conversion Type'
- Default value is missing in profile 'OS: Forecast Calendar'
- No type mapping found in AS_MC_TYPE_MAPPINGS
- Default value is missing in profile 'OS: Preferred Reporting Currency'
- Default value is missing in profile 'JTF_PROFILE_DEFAULT_CURRENCY'
- No active revenue credit type found in ASO_I_SALES_CREDIT_TYPES_V.
- No active non-revenue credit type found in ASO_I_SALES_CREDIT_TYPES_V.
- No reporting currency found in FND lookup
- Duplicate records found in AS_FST_SALES_CATEGORIES
- Duplicate records found in AS_PE_INT_CATEGORIES

5.7.6 Setting Up Default User Role and Sales Group

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

5.7.7 Creating a Custom Responsibility

Follow the instructions in the *Managing Oracle Applications Security chapter of the Oracle Applications System Administrator's Guide.*

Steps

If you are creating a responsibility for any other sales application other than Sales Online, you must:

1. Create a region similar to OSO's function security region, ASF_FUNC_SEC_REG, by copying it.
2. Set up the value of FUNCTION_SECURITY_REGION profile to the region that you created for your application
3. Set up the value of OSO: Application Utility Class profile to "oracle.apps.asf.util.OsoAppUtility.java"

5.8 Setting Up Lead Management

Applies to: Sales Online, TeleSales

Setting up leads consists of the following:

- Section 5.8.3, "Setting Up Lead Status" on page 5-43
- Section 5.8.4, "Setting Up Lead Qualification" on page 5-44
- Section 5.8.5, "Setting Up Automatic Lead Assignment" on page 5-45
- Section 5.8.6, "Setting Up Automatic Lead Ranking" on page 5-49
- Section 5.8.7, "Setting Up a Lead Scorecard" on page 5-50
- Section 5.8.8, "Setting Up Lead Rank Mapping" on page 5-52
- Section 5.8.9, "User Hook for a Custom Lead Ranking Engine" on page 5-53
- Section 5.8.10, "Setting Up Lead System Profiles" on page 5-54

5.8.1 Lead Status Changes for Customers Upgrading from Previous Versions

The progress of a lead is now tracked by a combination of Lead Status and the Accepted and Qualified check boxes. In past releases lead qualification depended on lead status only.

Lead statuses are upgraded for you automatically when you install the new version of the application as described in the table below. Here is an explanation of the table columns:

- **Old Status:** Status in previous releases.

- **New Status**: What the old status is being changed into.
- **Additional Action**: Additional updating by the script.

Old Status	New Status	Additional Action
Qualified	In Progress	The Qualified check box is selected.
Unqualified	In Progress	None.
Accepted	In Progress	The Accepted check box is selected.
Opportunity	Converted to Opportunity	None.
Declined	New	None.

5.8.2 Lead Overview

The following section details various areas of lead setup.

Lead Status and Lead Qualification

The progress of a lead is tracked by its status and qualification flag. This is a change from previous Oracle TeleSales releases.

The status of a lead and lead qualification now provide independent ways of tracking progress of a lead.

Agents select a lead status by making a selection from the Lead Status drop-down list. They qualify a lead by selecting the Qualified check box.

The implementer can set up an automatic lead qualification process which qualifies the lead whenever agents enter information in a set of fields determined by the implementer. These include project name, time frame, budget, channel, status, campaign, contact role, and contact phone.

To qualify a lead, the application looks to see only if an entry has been made in the specified fields. It does not evaluate the quality of the lead. The application determines if a lead is qualified or not each time an agent updates it.

Ranking a Lead Automatically Using the Score Card

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

The application determines the quality of the lead by using the lead score card and lead rank mapping. Both are set up by the application implementer or administrator.

The Score Card

The score card assigns different numbers of points to entries depending on desirability. For example, a time frame of 1-3 months receives more points than a time frame of 1 year. A budget of $1 million receives more points than a budget of $10,000. Setting up leads requires the following steps.

Lead Rank Mapping

The lead rank mapping converts the total number of points calculated by the score card and assigns the lead rank to the lead. 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.

5.8.3 Setting Up Lead Status

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

- New
- In Progress
- Converted to Opportunity
- Dead Lead
- Loss

Use the following procedure to define alternate statuses. The procedure for creating lead statuses is almost identical to the procedure for setting up Opportunity Status.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Opportunity > Status Code

Steps

1. Navigate to the Status Code page.

2. Click **Create**.

   The Status Code Values page appears.

3. Enter the status code name in Status Code. Users cannot see this name. It is for your own internal use only.

4. Enter the meaning in the Meaning field. This is what users see on their drop-down list when they select a lead status.

5. Add an optional description for the status.

6. Select the **Enabled** check box.

   > **Note:** Do not select either Open or Include in Forecast check boxes. These are reserved for setting up opportunity statuses.

7. In the Used for region, select the Sales Lead check box.

8. Make sure that Neither is the radio button selected in the Win Loss Indicator region. The other radio buttons are reserved for opportunity statuses.

9. Click **Create**.

5.8.4 Setting Up Lead Qualification

This release changes the lead qualification process. An agent now qualifies a lead by selecting the Qualified check box instead of changing the lead status to qualified as in previous releases.

The process of setting up the automatic qualification process remains the same.

Use this procedure to enable the automatic qualification of leads. The qualification process is triggered whenever the an agent updates a lead or creates a new lead and the Qualified check box is not already selected.

Forms Navigation

Old Setup > System Profiles

Steps

1. Make sure the system profile OS: Auto Qualify Lead is set to Y. This is the default setting.

2. Set up the rules for qualifying leads by setting the profile options listed below. Setting a profile to Y means that agents must enter information in the field before the lead can be qualified. For example, setting OS: Project Name Required to Y, means that agents must enter a project name for the lead to become qualified. The lead is qualified when the agent enters all of the required information.
   - OS: Project Name Required
   - OS: Sales Channel Required
   - OS: Total Budget Amount Required
   - OS: Decision Time Frame Required
   - OS: Budget status required
   - OS: Campaign Code Required
   - OS: Contact Role Required
   - OS: Contact Phone Required

5.8.5 Setting Up Automatic Lead Assignment

Use this procedure to set up the application to automatically assign resources to a lead whenever an agent updates the lead.

Forms Navigation

Old Setup > System Profiles

Steps

1. To enable automatic lead assignment, make sure that the system profile option OS: Assign New Lead is set to `N`. This is the default seeded value.

   When this profile is set to `N`, a call to the Territory Manager API automatically assigns resources to the lead using the territories defined in Territory Manager. The first person the program assigns becomes the lead owner. The rest of the resources in the territory become sales team members on the lead.

2. Set up the default resource to handle any leads that are not matched to any territory in the system profile option OS: Default Resource ID Used for Sales Lead Assignment.

   If there is no matching territory, then the application assigns the lead to the default resource set in this profile option. If you do not set this profile option, then the application assigns the lead to the agent who created or updated the lead.

> **Note:** If both the resource in OS: Default Resource ID Used for Sales Lead Assignment and the user who created or updated the lead do not have valid sales role assigned to them, then the leads you import will not be accessible from either Oracle Sales Online or Oracle TeleSales.

3. If the territories in your organization use agent availability as one of the criteria for assigning agents, then setting the profile OS: Calendar Setting Required for Assignment to Yes enables the automatic assignment of lead owners based on availability. If you are using agent availability for assigning lead ownership then you must make sure that each resource has a calendar set up for them. OS: Calendar Setting Required for Assignment is set to No by default. See Implementing Calendar section of the *Oracle CRM Applications Foundation Implementation Guide* for more details.
4. Optionally, you can implement custom rules for lead assignment by implementing the Lead Routing Engine user hook described below.
5. After the lead is assigned either automatically or by the agent, the application changes the lead status to the status set in profile option OS: Lead Routing Status. Out of the box value is New. If you wish to change this default, do so now.

Lead Routing Engine

Hook name: AS_LEAD_ROUTING_WF

Package Name: AS_LEAD_ROUTING_WF_CUHK

Purpose

If you are implementing custom lead routing rules, then create a package body according to these specifications.

> **Note:** Please do not commit in this package body. After the transaction is complete, Oracle application code will issue commit.

This user hook will be called when an agent is creating and updating a lead in the Oracle Sales Online, TeleSales leads tab, and from the lead import program whenever the routing engine is called.

The calling package is AS_LEAD_ROUTING_WF.GetOwner.

API name

Get_Owner_Pre

In Parameters

The following four parameters are standard input:

Parameter	Description
p_api_version_number	For 11i Oracle Sales applications, this is set to 2.0.
p_init_msg_list	Initialize message stack or not. Set to FND_API.G_FALSE by default.
p_validation_level	Validation level of pass-in value. Set to FND_API.G_VALID_LEVEL_FULL by default.
p_commit	Whether commit the whole API at the end of API. Set to FND_API.G_FALSE by default.

The following three parameters store the available resources for this customized package to decide the owner of the sales lead. Their data type is TABLE of NUMBERs.

- p_resource_id_tbl
- p_group_id_tbl
- p_person_id_tbl

Other parameters:

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>p_resource_flag_tbl</td><td>This parameter specifies the source of the resource:

’D’: Default resource from the profile AS_DEFAULT_RESOURCE_ID, "OS: Default Resource ID used for Sales Lead Assignment".
'L': Login user.
'T': Territory definition.

If the sales lead matches any territory, the above parameters will include all the resources returned from territory engine and p_resource_flag_tbl will be all 'T'.
If the sales lead does not match any territory:

Profile "OS: Default Resource ID used for Sales Lead Assignment" is set:

p_resource_id_tbl(1), p_group_id_tbl(1), p_person_id_tbl(1) is the default resource defined in this profile.
p_resource_flag_tbl(1)='D'
p_resource_id_tbl(2), p_group_id_tbl(2), p_person_id_tbl(2) is the login user.
p_resource_flag_tbl(2)='L'

<ol start="2">
Profile "OS: Default Resource ID used for Sales Lead Assignment" is not set:

p_resource_id_tbl(1), p_group_id_tbl(1),
p_person_id_tbl(1) is the login user.
p_resource_flag_tbl(1)='L'
</td></tr>
<tr><td>p_sales_lead_rec</td><td>This provides the whole definition of a sales lead. This record is provided to help an Oracle customer decide sales lead owner.</td></tr>
</table>

Out Parameters

The following three parameters store the result of this user hook:

- x_resource_id
- x_group_id
- x_person_id

Together these set the sales lead owner.

If x_resource_id is NULL, the owner is decided based upon Oracle’s logic.

For instance, x_resource_id=1001, x_group_id=10, x_person_id=100, this means the resource with the resource id 1001, group id 10, and person id 100, is assigned as the owner of the sales lead.

Standard output parameters:

Parameter	Definition
x_return_status	The return status. If your code completes successfully, then FND_API.G_RET_STS_SUCCESS must be returned. If you get an expected error, then return FND_API.G_RET_STS_ERROR, otherwise return FND_API.G_RET_STS_UNEXP_ERROR.
x_msg_count	The message count. Call FND_MSG_PUB.Count_And_Get to get the message count and messages.
x_msg_data	The messages. Call FND_MSG_PUB.Count_And_Get to get the message count and messages.

5.8.6 Setting Up Automatic Lead Ranking

Use this procedure to set up automatic ranking of a lead.

Steps

1. Navigate to **Old Setup > System Profiles.**
2. Make sure the system profile option OS: Rank Lead is set to `System`. This is the seeded default value.
3. Set up your lead score card. This assigns a numerical score to entries users make in different fields. See Section 5.8.7, "Setting Up a Lead Scorecard" on page 5-50.
4. Map the values the score card returns to the different lead rankings according to the procedure describe in Section 5.8.8, "Setting Up Lead Rank Mapping" on page 5-52.
5. Select the score card you wish to use to score leads by setting the system profile OS: Default Lead Scorecard to that scorecard. The ranking engine uses the default scorecard if no other scorecards are enabled. The seeded default of this profile is the scorecard provided by Oracle.
6. Optionally, you can implement a custom ranking engine by using a user hook. See Section 5.8.9, "User Hook for a Custom Lead Ranking Engine" on page 5-53.

5.8.7 Setting Up a Lead Scorecard

Use the procedure outlined below to set up a lead scorecard.

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.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Lead > Lead Scorecard

Steps

The Lead Scorecards page appears listing the available scorecards.

1. To modify an existing scorecard instead of creating a new one, then you can display it by:
   - Clicking on the name link of the scorecard in the list.
   - If you do not see the scorecard you see on the list, you can search for it by entering search criteria in the Find Scorecards region and clicking search.

     The creation procedure given below will give you a good idea on how you can modify an existing scorecard.
2. To create a new scorecard, click **Create**.

   The Create Lead Scorecard page opens.
3. Enter a Description.
4. Select a Start Date by clicking the Calendar icon and choosing a date. This is a required field.
5. Optionally, select an End Date.

   You are now ready to create the rules the score card will use to calculate the desirability of a lead.
6. For each rule you wish to use:
   a. 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

b. 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.

---

c. Click **Create**.

The Lead Scorecard Details page appears displaying your new qualifier and score.

d. Click **Edit** to the right of the new row.

The Parameter page appears. The appearance and name of this pages is different for each qualifier.

This is where you map the score you entered previously to the entry a user makes in the lead. For example, you may assign the Budget Status of Approved to the score of 100.

Each qualifier has its own parameter page. For time frame, for example, this page displays a drop-down list with all of the different valid time frames set up in a lookup DECISION_TIMEFRAME. For budget amount, you enter the amount in a text field.

e. Make an entry either from a drop-down, list of values, or a text box, depending on the qualifier.

f. Click **Save**.

The rule you have created appears on the Lead Scorecard Details page. You are now ready to create another rule.

7. When you have completed adding rules, click **Update**.

8. Set the system profile option OS: Default Lead Scorecard to the scorecard you wish to use for scoring leads.

   You are now ready to map the scores your scorecard calculates to the desired lead ranking.

5.8.8 Setting Up Lead Rank Mapping

Use this procedure to set up lead ranking.

Prerequisites

You must create a lead score card first and create the rank mapping based on the possible scores that score card can assign to leads.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Lead > Lead Rank Mapping

Steps

1. Navigate to The Lead Rank Mapping page.
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**.

5.8.9 User Hook for a Custom Lead Ranking Engine

User hooks permit you to bypass Oracle code and implement custom code instead.

Hook Name: AS_SCORECARD_PVT

Package Name: AS_SCORECARD_CUHK

Purpose

Specifications to be used for implementing custom scoring engine.

Note: Please do not commit in this package body. After the transaction is complete, Oracle application code will issue commit.

This user hook will be called when an agent is creating and updating a lead in Oracle Sales Online, Oracle TeleSales, and from the lead import program whenever the routing engine is called.

Calling Package

AS_SCORECARD_PVT.Get_Score

API Name

Get_Score_Pre

In Parameters

The following table lists the four standard parameters:

Parameter	Description
p_api_version_number	For 11i Oracle Sales application this is 2.0.
p_init_msg_list	Determines whether or not to initialize the message stack. Set to FND_API.G_FALSE by default.
p_validation_level	Validation level for pass-in values. Set to FND_API.G_VALID_LEVEL_FULL by default.
p_commit	Determines whether or not to commit the whole API at the end of the API. Set to FND_API.G_FALSE by default.

The following table lists other parameters:

Parameter	
p_sales_lead_id	This is the sales lead identifier. Pass the sales_lead_id which you want to compute the score.
p_scorecard_id	Passes the scorecard_id for the score card to be used for scoring leads.

Out Parameters

The following table describes the non-standard out parameter

Parameter	Description
x_score	This is the score of the lead. User's score engine should return this score and Oracle API will rank the lead base on this score.

The following table lists standard output parameters.

Parameter	Description
x_return_status	The return status. If your code completes successfully, then FND_API.G_RET_STS_SUCCESS should be returned; if you get an expected error, then return FND_API.G_RET_STS_ERROR; otherwise return FND_API.G_RET_STS_UNEXP_ERROR.
x_msg_count	The message count. Call FND_MSG_PUB.Count_And_Get to get the message count and messages.
x_msg_data	The messages. Call FND_MSG_PUB.Count_And_Get to get the message count and messages.

5.8.10 Setting Up Lead System Profiles

Forms Navigation

Old Setup > System Profiles

The following table details the system profiles to be set up for leads.

Here is an overview of the different columns of the table of profiles:

- **Req.?**: A Y in this column means that setting this profile is required. An N in this column means that setting this profile is optional.
- **New**: A Y in this column indicates this profile is new in this release. An N means that it was introduced in prior releases.

- **Profile Option**: User name of the profile option.
- **Level**: Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.
- **User**: This column indicates whether user can view and modify the profile. Values are: V (Visible) = the user can see the profile only, U (Updatable) = users themselves can update the profile.
- **Default Value**: Gives the seeded default.
- **Notes**: Usage notes.

The following table lists lead profiles:

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
Y	N	OM: Item Validation Organization	SR	V	V	None	Manufacturing organization items are validated. This profile is used to set AS_SALES_LEAD_LINES.organization_id
Y	Y	OS: Address Required for Person	S	None	V	'N	If set to 'Y', the Lead Contact page in Oracle Sales Online displays the Create Person button. The person or contact has to be created by clicking this button and entering address information on the Create Person page. If set to 'N', the user can enter contact information in empty rows.
N	Y	OS: Address Required for Sales Lead	S	None	V, U	No	Makes address entry mandatory for leads. If not set, then address is required. The API gives users an error if the address is required but not present in the record.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	Y	OS: Assign New Lead	S	None	V	Nz	if this profile is set to No, then the application uses the Territory Manager to automatically assign resources to the lead. The first person the Territory Manager assigns becomes the owner. The rest of the resources in the territory become sales team members on the lead. if this profile is set to Yes, then the agent must enter the owner manually using the Owner drop-down list. If the agent does not make an entry, then the lead is assigned to the default user set in OS: Default Resource ID Used for Sales Leads. If no default resource is set, then application assigns ownership to the user updating or importing the lead. Note: If both the resource in this profile and the user who created or updated the lead do not have a valid sales role assigned to them, then the leads you import will not be accessible from either Oracle Sales Online or Oracle TeleSales.
N	Y	OS: Auto Qualify Lead	S	V	V	Yes	Turns automatic qualification for sales leads on or off. A setting of Yes, causes the application to attempt to qualify a lead each time the lead is updated. A setting of No means the user must qualify the lead manually by selecting the Qualified check box. If this profile is not set, it is defaulted to 'N'.
N	N	OS: Budget status required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a budget status to qualify the lead. If the profile option value is No, then lead qualification does not depend budget status entry.
N	N	OS: Calendar setting required for assignment	S	V	V	N	Calendar setting required for sales lead assignment. If set a "Yes", then the routing APIs check availability of resource in JTF Calendar before assigning the lead owner.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	N	OS: Campaign code required	S	None	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a campaign code to qualify the lead. If the profile option value is No, then lead qualification does not depend on the campaign code.
N	N	OS: Contact phone required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a contact phone to qualify the lead. If the profile option value is No, then lead qualification does not depend on the contact phone.
N	N	OS: Contact role required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a contact role to qualify the lead. If the profile option value is No, then lead qualification does not depend on the contact role.
Y	N	OS: Customer Access Privilege	S,R,U	None	V,U	Full	Security management for leads. See the section on security for details.
NOT USED	Y	OS: Dead Lead Status	S	None	V	Dead Lead	Not Used
N	N	OS: Decision time frame required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a decision time frame to qualify the lead. If the profile option value is No, then lead qualification does not depend on the decision time frame.
N	Y	OS: Default Budget Status for Leads	S, R , U	V, U	V, U	Pending	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
Y	Y	OS: Default Channel for Leads	S, R , U	V, U	V, U	Direct	Used for defaulting value in UI and also in API. If not set, then the application inserts a null value and notifies the user of an error.
N	Y	OS: Default Decision Timeframe for Leads	S, R , U	V, U	V, U	Within 1 week	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
N	Y	OS: Default Lead Contact Role	SRUA	VU	V	’END_USER	Used for defaulting the contact role on the contact page.
Y	Y	OS: Default Lead Scorecard	SRA	VU	V	1	Scorecard to be used for lead ranking. If not set, the scoring engine will not function. While creating leads, the UI retrieves this value and passes it to the scoring APIs.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	N	OS: Default Resource ID Used for Sales Lead Assignment	S	None	V	None	The territory assignment program assigns ownership of a lead to this Resource ID if the program does not find any matching territory for the lead. If this profile is not set, then the ownership of any unassigned leads are automatically assigned to the user creating or importing the lead. This user must have a valid sales role assigned using Resource Manager. If the user does not have a valid sales role, then unassigned leads will not be accessible from Oracle Sales Online or Oracle TeleSales.
Y	Y	OS: Default Status for Leads	S, R , U	V, U	V, U	New	Used for defaulting value in UI and also in API. If not set, then the application inserts a null value and notifies the user of an error.
N	Y	OS: Default Vehicle Response Code for Leads	S, R , U	V, U	V, U	User	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
Y	Y	OS: Lead Link Status	V	None	V	Converte d to Opportun ity	Used to set the status of the lead after linking the lead to an opportunity.
Y	Y	OS: Lead Routing Status	S	None	V	New	When the routing engine finds a sales lead owner, then the sales lead status is reset to this profile
Y	N	OS: Manager Update Access	S,R,U	None	V,U	View data	Security management for leads. See the section on security for details.
Y	N	OS: Opportunity Access Privilege	S,R,U	None	V,U	Global Full	Security management for leads. See the section on security for details.
N	Y	OS: Privilege to Change Lead Owner	S, R , U	None	V,U	No	A user with this privilege can change the owner of a lead to which he/she has update access. Users who do not have this privilege can change owner of only those leads that they own. This profile is used to allow the user to change lead owner even if the user is not the current owner for lead. If not set, the application default this profile to No.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	N	OS: Project name required	S	V, U	V,U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a project name to qualify the lead. If the profile option value is No, then lead qualification does not depend project name.
N	Y	OS: Rank Lead	S	None	V	System	If the value is Yes and user has not entered a lead rank, then the ranking engine is invoked to rank the lead. If a rank is passed in by the UI, then it is saved to the database and this profile is ignored. Profile OS: Default Scorecard must be set.
Y	N	OS: Sales Admin Update Access	S,R,U	None	V,U	View data	Security management for leads. See the section on security for details.
N	N	OS: Sales channel required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a sales channel to qualify the lead. If the profile option value is No, then lead qualification does not depend on sales channel entry.
Y	N	OS: Sales Lead Access Privilege	S, R , U	None	V,U	Full	<Access APIs>
N	Y	OS: Source Code Mandatory for Leads	S	V	V	No	Used to make source code (campaign) entry mandatory for leads. A Yes setting causes an error to appear if a user tries to save a lead without a source code. If this profile is not set, the application treats this as a Yes setting.
N	N	OS: Total budget amount required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a total budget amount to qualify the lead. If the profile option value is No, then lead qualification does not depend on the total budget amount.
Y	N	OSO: Default Country	SRAU	VU	VU	United States	Used for defaulting the country selected on the create lead page. If not set, the first country in the drop-down list will be chosen by default.
N	N	OSO: Default Person Relationship	SRU	VU	V	'EMPLOYEE_OF	The default value for contact relationship type.

The table below lists profiles related to leads. You must also set the following profiles to enable calculations in multiple currencies.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
Y	N	OS: Forecast Calendar	S	None	V	None	The name of the calendar you are using to manage your forecasts. Used to get period set name used in as_period_rates table.
Y	N	OS: Daily Conversion Type	V	V,U	V,U	Corporate	Daily conversion type for currency conversion. Used in the amount calculation.
Y	N	OS: Date Mapping Type	S	VU	V	S	Used to get pseudo period rate coming from start or end of the period.
Y	N	OS: Maximum Roll Days for Converting Amount	S	V	V	None	Maximum Roll Days for Converting Amount if No Conversion Rate exists for a Day. Used to get maximum rollup days for currency conversion
Y	Y	OS: Default Period Type for Currency Conversion	S	VU	V	None	Default period type for currency conversion. Used to get default period type for currency conversion.

5.9 Importing Leads

Applies to: Sales Online, TeleSales

Lead import allows you to import leads into Oracle Sales from other systems. While importing leads, the program also imports data on customers, addresses, and contacts into the customer model (TCA) tables.

This topic covers:

- Lead import overview.
- New features. See Section 5.9.2, "New in This Release" on page 5-62.
- Fixes to known past problems. See Section 5.9.3, "Fixes to Known Problems" on page 5-63.
- Overview of the lead import steps. Section 5.9.4, "Procedure Overview" on page 5-63.
- What you must set up before importing leads. See Section 5.9.5, "Setting Up Lead Import" on page 5-63.
- Lead import procedure. See Section 5.9.6, "Importing Leads from a File or by Populating the Lead Interface Table" on page 5-65.

- Sample data file to give you an idea of import file setup. See Section 5.9.7, "Sample Data File" on page 5-67.
- Correcting any errors from the lead import procedure. See Section 5.9.8, "Checking for and Correcting Errors in Imported Leads" on page 5-68.
- You can view the structure of the lead import flat file and lead import tables in Section 5.9.9, "Flat File and Import Table Structure" on page 5-70.
- If you are importing data in flexfields see Section 5.9.10, "How to Import Flexfields" on page 5-94.
- If you wish to customize the lead import program see Section 5.9.11, "Understanding and Extending the Lead Import Program" on page 5-94.
- If you wish to set up custom duplicate lead checking, see Section 5.9.12, "User Hook for Customizing Duplicate Lead Checking" on page 5-96.
- For an understanding of how the lead import program checks for duplicate information in your database, see Section 5.9.13, "How Lead Import Checks for Duplicates" on page 5-98.
- To understand the structure of the lead import error table see Section 5.9.14, "Lead Import Errors Table Structure" on page 5-112.
- For a list of functions that generate sequences used by the import program see Section 5.9.15, "Sequence Generators" on page 5-112.
- For a schematic overview of the import process see Section 5.9.16, "Database Design" on page 5-113.

5.9.1 Lead Import Overview

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 points 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

5.9.2 New in This Release

Prior to this release, lead import had only the following tables: AS_IMPORT_INTERFACE and AS_IMP_SL_FLEX.

Lead import was limited to five purchase items (lines) per lead.

These new tables were created to overcome these limitations: AS_IMP_LINES_INTERFACE, AS_IMP_CNT_ROL_INTERFACE, and AS_IMP_CNT_PNT_INTERFACE.

These changes are backward-compatible. This means that you can continue to populate interest_type_id_1 ~ 5 columns and other columns in AS_IMPORT_INTERFACE and lead import program will import them to Oracle Sales.

If you want to import more than five purchase items (lines), multiple contact roles, or multiple contact points, however, then you must populate the new interface tables with your own code. The controller program does not support the new interface tables.

If you populate purchase items columns in AS_IMPORT_INTERFACE and also in the AS_IMP_LINES_INTERFACE, the data in both tables will be imported.

Below is a list of new additions and changes to the lead import procedure:

- Users can now purge error messages from AS_IMPORT_INTERFACE by setting the "Purge error message?" parameter to Yes before the Lead Import program processes imported leads. The default value of this parameter has been set to 'No' by default.
- The control file used for loading AS_IMPORT_INTERFACE has been modified to accommodate new columns in AS_IMPORT_INTERFACE.
- New tables have been added to support multiple purchase items (lines), contact roles, and contact points. All of these tables are optional. You are not required to make changes in your current lead import program.

5.9.3 Fixes to Known Problems

Previous versions of Lead Import allowed you to enter leads that are missing the as_sales_leads.description column. Such leads are not accessible from Oracle Sales Online. They appear on the summary page but you can drill down on them only from lead number column. To avoid this problem, you may want to write an upgrade script to update the as_sales_leads.description column.

In this release, the lead import defaults this column to `contact last_name, first_name` if the description is blank. If the contact is missing, then the leads api defaults the description to the `sales_lead_id`.

5.9.4 Procedure Overview

Importing leads into the database requires you to:

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

See Section 5.9.13, "How Lead Import Checks for Duplicates" on page 5-98 for information on duplicate checking.

5.9.5 Setting Up Lead Import

Use this procedure to set up lead import.

Prerequisites

You must set up leads, including required lead system profile options as described in Section 5.8, "Setting Up Lead Management".

Before importing leads you must also set up your territories. This means both creating the territories and creating the territory mapping.

Steps

1. Set up system profile options for lead import.

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

   - HZ: Key Word Count

     Default setting: 5

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

- HZ: Address Key Length

  Default setting: 15

- HZ: Postal Code Key Length

  Default setting: 5

- HZ Cleanse Fuzzy Key

  Default setting: 5

The following system profile options are used by the lead import process itself:

- OS: Default Resource ID Used for Sales Lead Assignment

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

  Note: You must set this profile to a resource that has a valid sales role assigned in Resource Manager. If you do not assign a valid resource, then the ownership of unassigned leads is assigned to the user importing or updating the leads. If that user is also not set up in Resource Manager, then leads you import will not be accessible from either Oracle Sales Online or Oracle TeleSales.

- OS: Auto Assigning from Lead Import

  Default setting: Y

- OS: Auto Ranking from Lead Import

  Default setting: Y

2. Under the Oracle Sales Administrator responsibility, navigate to **CRM Foundation > Territory Manager > Territory Administration** and create your territories inside the Oracle Sales and TeleSales node on the territory setup form. Refer to the Implementing Territory Manager section of the *Oracle CRM Applications Foundation Implementation Guide.*

3. Successfully run the Generate Territory Packages concurrent program. This concurrent program builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import

leads and each time after you modify the territory setup. You need not run this program every time you import leads.

4. Set up word replacement rules by logging in under the Receivables Manager Responsibility and navigating to **Setup > Word Replacement Rules**.

5. If you have changed any of the key-related profiles or word replacement rules or if this is the first time you are carrying out this procedure, then:

   a. Switch to the Receivables Manager responsibility.

   b. If you have changed the customer related key system profiles or this is the first time you are implementing the application, then generate the customer key by running the Generate Keys for Fuzzy Match concurrent program with the Table parameter set to Name and the New Rows Only parameter set to No.

   c. If you have changed any of the address-related key system profiles or this is the first time you are implementing the application, then generate the address key by running the Generate Keys for Fuzzy Match concurrent program with the Table parameter set to Address and the New Rows Only parameter set to No.

5.9.6 Importing Leads from a File or by Populating the Lead Interface Table

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

Prerequisites

- You must be familiar with running concurrent programs as described in the *Oracle Applications Systems Administrator's Guide.*
- You must be familiar with Oracle SQL Loader as described in the *Oracle 8i Utilities* guide.
- You must be familiar with running SQL Plus database queries.

Steps

1. If you wish to import leads from a file then:

   a. FTP the tilde-delimited file with lead data to a directory on the server. The file must have a file name with the extension `.dat` and the structure described in Section 5.9.9, "Flat File and Import Table Structure" on page 5-70. A sample file with one data line is listed in Section 5.9.7, "Sample Data File" on page 5-67.

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

---

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

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

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

c. Log in under the Oracle TeleSales Administration responsibility.

d. Run the OTS: Load Sales Lead Interface Table from Flat File concurrent program. This program populates the lead interface table (AS_IMPORT_INTERFACE). To run the program you must know the absolute path to the P_DATAFILE you created in the previous step.

2. Populate any flexfields data into the table AS_IMP_SL_FLEX. See Section 5.9.10, "How to Import Flexfields" on page 5-94.

3. After loading leads into the lead interface table, run the Lead Import concurrent program using the following parameters (See Section 5.9.11, "Understanding and Extending the Lead Import Program" on page 5-94 for an explanation of what the lead import program does and how to extend it using built-in user hooks.)

Parameter	Required?	Lookup	Remarks
Source System	Yes	The available source systems are seeded in lookup type: SOURCE_SYSTEM	Only the records that match the parameter value will be selected for processing. This is case sensitive.
Creation Date	No	Do not enter.	This is obsolete.

Parameter	Required?	Lookup	Remarks
Batch ID	No		
Purge error message?	No	Enter either Y or N	If you enter Y, then all existing records in AS_LEAD_IMPORT_ERRORS are deleted. By default, this parameter is set to No. This mean that if you do not make an entry, then existing error messages are not deleted from the table.

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

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

5.9.7 Sample Data File

Below is a sample data file for loading AS_IMPORT_INTERFACE. This example contains only one line of data.

```
~16-Sep-01~-1~16-Sep-01~-1~-1~LEAD_LOAD~16-Sep-01~NEW~ABC Corp~US~123 Xyz
st.~Suite1008~~~RedwoodCity~94065~CA~~~7374~2000~CUSTOMER~MAR~15000~5000000~6000
000~DECISIONMAKER~1023472~1900~N~M~MR~~Hislast~Hisfirst~A~AccountsPayableSupervi
sor~ARC~101~926-2667~GEN~650~123~926-2600~650~www.xyz.com~abc@xyz.com~Y~Y~N~N~NE
W~DECISION_MAKER~DIRECT~10000~APPROVED~US~1-3MONTHS~~AAA~Lead1~EMAIL~159~424~425
~357~204~EA~100~50000~10588~10699~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~Leadco
llectedon16-SEP-01~~NEW~10001~OTN::990~10004~Y~Y~~~~~~N~Y~Y~~~~10060~Y~1-Jan-00~
~~USERENTERED~XYZHQ~~~10~~~~~~94065-1282~~~HQ~~~~1008~~~~~~~~XYZ~~~~~~15-Aug-01~
~~~~~~~~~N~1987SIC~~101~550000~~~N~MARKET~~10~~~Importantcontact~~Y~InformationT
echnology~IT~DECISION_MAKER~10588~N~Y~USER_ENTERED~1~1~~~~MAILHTML~123
```

5.9.8 Checking for and Correcting Errors in Imported Leads

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

Note: Do not attempt to change the status of a lead from Success to New. A status of Success means that a lead has been successfully imported and cannot be imported again. This illegal operation is not permitted by the user interface.

Prerequisite

You must:

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

Steps

1. Under the Sales Administration responsibility, navigate to **Administration > Sales > Lead > Lead Import**

   The Lead Import page appears.

2. Select the source system from the Source System drop-down list.
3. From the Load Status drop-down list, select Error.
4. Click **Search**.

   The page refreshes, listing the errors found during import.

5. To view and correct an error, click the link in the Import Interface ID column for the error you wish to correct.

   The Error Detail page appears displaying details about the error in this record.

6. Depending on the error, click on one of the two links:

   - **Organization**: For errors with customer fields.
   - **Lead**: For errors relating to lead information.
   - **Errors**: This link is not used from this page. It is designed to take you back to this page from other pages.

7. If you are correcting errors with customer fields and you clicked Organization, then:

   The Organization Detail page appears.

   a. Make the correction suggested by the error message.

   b. Change the Load Status for the record to New.

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

   c. Click **Update** to save your correction.

   Note: If your record was imported successfully, then you cannot update the record and the **Update** button is not visible.

   d. Click **Return** or the ASF_ERRORS link to return to the Error Detail page where you can view another error.

8. If you are correcting errors with lead fields and you clicked **Lead**, then:

   The Lead Detail page appears.

   a. Make the correction suggested by the error message.

   b. Change the Load Status for the record to New.

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

   c. Click **Update** to save your correction.

   d. Click **Return** or the ASF_ERRORS link to return to the Error Detail page where you can view another error.

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

9. Repeat this procedure for each record with an error.

10. After the concurrent program has completed successfully, check to see if there are any remaining errors by running another Query Enter / Query Run query on Load Status of Error.

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

5.9.9 Flat File and Import Table Structure

The flat file you are importing leads from must be a tilde-delimited file. The file name must have the extension `.dat` (For example, `mynewleads.dat`). Please note:

- As the leads you import are not deleted from the interface table AS_IMPORT_INTERFACE even after they are successfully imported into the database, you should enter different batch ID in each import file to make sure you can distinguish between runs.
- A Yes entry in the Required column means that a null or incorrect entry in the field results in a database error.

  You must provide valid values to these columns. This means running SQL*Plus queries to obtain some of the values required by this table. The columns you must query and sample queries for your use are listed in the Valid Values column.
- Lead import records can contain null fields except for the required fields noted below.

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

The following table lists all the columns that are present in both the AS_IMPORT_INTERFACE table and in the control file. The order of these fields is also the same in both. In addition to the fields listed here, the table also includes additional columns most of which are obsolete. See Additional Columns in the Interface Table Only on page 5-88.

Columns Present in Both the Interface Table and Control File

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMPORT_INTERFACE_ID	Y	NUMBER	select as_import_interface_s.nextval from sys.dual		

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
LAST_UPDATE_DATE	Y	DATE		] If using "Load Sales Lead	
LAST_UPDATED_BY	Y	NUMBER		] Interface Table from Flat File	"
CREATION_DATE	Y	DATE		] to load data, loader will	
CREATED_BY	Y	NUMBER		] populate these columns with	
LAST_UPDATE_LOGIN	Y	NUMBER		] sysdate(date) and -1(user id)	
LOAD_TYPE		VARCHAR2 (20)	'LEAD_LOAD'		
LOAD_DATE		DATE			
LOAD_STATUS	Y	VARCHAR2 (20)	select lookup_code from as_lookups where lookup_type='LOAD_STATUS'	The value should be 'NEW' before importing. The value will be changed to 'SUCCESS' if successful imported, 'ERROR' if not.	
CUSTOMER_NAME	Y	VARCHAR2 (255)			HZ_PARTIES.party_name
COUNTRY		VARCHAR2 (60)	select territory_code from fnd_territories_vl	If country is supplied then address1 needs to be supplied and vice-versa.	HZ_LOCATIONS.country
ADDRESS1		VARCHAR2 (240)		Country and address1 are required for creating location, party site and party site uses	HZ_LOCATIONS.address1
ADDRESS2		VARCHAR2 (240)			HZ_LOCATIONS.address2
ADDRESS3		VARCHAR2 (240)			HZ_LOCATIONS.address3
ADDRESS4		VARCHAR2 (240)			HZ_LOCATIONS.address4

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
CITY		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_valuefrom ar_location_values where location_segment_qualifier = 'CITY'		HZ_LOCATIONS.city
POSTAL_CODE		VARCHAR2 (60)	select min(p.from_postal_code), max(p.to_postal_code) from ar_postal_code_ranges_v p, ar_location_values a where p.location_segment_id = a.location_segment_id and a.location_segment_qualifier | | '' = 'CITY' and a.location_segment_value like 'X%'		HZ_LOCATIONS.postal_code
STATE		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'STATE'		HZ_LOCATIONS.state
PROVINCE		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'PROVINCE'		HZ_LOCATIONS.province

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
COUNTY		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'COUNTY'		HZ_LOCATIONS.county
SIC_CODE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = '1987 SIC' and enabled_flag = 'Y'	If given, then SIC_CODE_TYPE must be provided too.	HZ_PARTIES.sic_code
ANALYSIS_FY		VARCHAR2 (5)		Analysis physical year	HZ_PARTIES.analysis_fy
CUSTOMER_CATEGORY_CODE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = 'CUSTOMER_CATEGORY' and enabled_flag='Y'		HZ_PARTIES.category_code
FISCAL_YEAREND_MONTH		VARCHAR2 (30)		free text format	HZ_PARTIES.fiscal_yearend_month
NUM_OF_EMPLOYEES		NUMBER(15)			HZ_PARTIES.employees_total
POTENTIAL_REVENUE_CURR_FY		NUMBER			HZ_PARTIES.curr_fy_potential_revenue
POTENTIAL_REVENUE_NEXT_FY		NUMBER			HZ_PARTIES.next_fy_potential_revenue
CUSTOMER_RANK		VARCHAR2 (30)			HZ_ORG_CONTACT_ROLES.role_type & AS_SALES_LEAD_CONTACTS.rank
TAX_REFERENCE		VARCHAR2 (50)			HZ_PARTIES.tax_reference
YEAR_ESTABLISHED		NUMBER(4)			HZ_PARTIES.year_established
ADDR_DO_NOT_MAIL_FLAG		VARCHAR2 (1)		If set to 'Y' no mails to customer site will be sent	
SEX_CODE		VARCHAR2 (30)			

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SALUTATION		VARCHAR2 (60)	ar_lookups.lookup_code where lookup_type = 'CONTACT_TITLE' and enabled_flag = 'Y'	This column is for terms used while greeting the contact. Like Her Highness.	HZ_PARTIES.person_academic_title & HZ_PARTIES.person_title
TITLE		VARCHAR2 (30)			HZ_PARTIES.person_pre_name_adjunct
LAST_NAME		VARCHAR2 (50)		] Last name and first name are	HZ_PARTIES.person_last_name
FIRST_NAME		VARCHAR2 (40)		] required for creating contact	HZ_PARTIES.person_first_name
MIDDLE_INITIAL		VARCHAR2 (10)			HZ_PARTIES.person_middle_name
JOB_TITLE		VARCHAR2 (50)			HZ_ORG_CONTACTS.job_title
JOB_TITLE_CODE		VARCHAR2 (30)	ar_lookups.lookup_code where lookup_type ='RESPONSIBILITY' and enabled_flag = 'Y'	Stores the job title code	HZ_ORG_CONTACTS.job_title_code
MAIL_STOP		VARCHAR2 (60)			HZ_ORG_CONTACTS.mail_stop
PHONE_NUMBER		VARCHAR2 (25)			HZ_CONTACT_POINTS.phone_number
PHONE_TYPE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = 'PHONE_LINE_TYPE' and enabled_flag = 'Y'		HZ_CONTACT_POINTS.phone_line_type
AREA_CODE		VARCHAR2 (10)			HZ_CONTACT_POINTS.phone_area_code
EXTENSION		VARCHAR2 (20)			HZ_CONTACT_POINTS.phone_extension
FAX_NUMBER		VARCHAR2 (25)			HZ_CONTACT_POINTS.phone_number
FAX_AREA_CODE		VARCHAR2 (10)			HZ_CONTACT_POINTS.phone_area_code
URL		VARCHAR2 (2000)			HZ_CONTACT_POINTS.url
EMAIL_ADDRESS		VARCHAR2 (240)			HZ_CONTACT_POINTS.email_address
CONT_DO_NOT_MAIL_FLAG		VARCHAR2 (1)	'Y' or 'N	'If set to 'Y' no mails will be sent to contact	HZ_CONTACT_RESTRICTIONS

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
DO_NOT_EMAIL_FLAG		VARCHAR2 (1)	Y' or 'N'	If 'Y' then no emails sent to Contact.	HZ_CONTACT_RESTRICTIONS
DO_NOT_FAX_FLAG		VARCHAR2 (1)	Y' or 'N'	If 'Y' then no fax sent to Contact.	HZ_CONTACT_RESTRICTIONS
DO_NOT_PHONE_FLAG		VARCHAR2 (1)	Y' or 'N'	If 'Y' then no phone calls to Contact.	HZ_CONTACT_RESTRICTIONS
STATUS_CODE		VARCHAR2 (30)	select status_code from as_statuses_b where lead_flag = 'Y' and enabled_flag = 'Y' and usage_indicator in ('ALL','OS')		AS_SALES_LEADS.status_code
CONTACT_ROLE_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'LEAD_CONTACT_ROLE'		AS_SALES_LEADS.contact_role_code & AS_SALES_LEAD_CONTACTS.contact_role_code
CHANNEL_CODE		VARCHAR2 (30)	select sales_channel_code from aso_i_sales_channels_v		AS_SALES_LEADS.channel_code
BUDGET_AMOUNT		NUMBER			AS_SALES_LEADS.budget_amount
BUDGET_STATUS_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'BUDGET_STATUS'		AS_SALES_LEADS.budget_status_code
CURRENCY_CODE		VARCHAR2 (15)	select currency_code from fnd_currencies where enabled_flag = 'Y'		AS_SALES_LEADS.currency_code
DECISION_TIMEFRAME_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'DECISION_TIMEFRAME'		AS_SALES_LEADS.decision_timeframe_code
CLOSE_REASON		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'CLOSE_REASON		AS_SALES_LEADS.close_reason
PARENT_PROJECT		VARCHAR2 (80)			AS_SALES_LEADS.parent_project
DESCRIPTION		VARCHAR2 (2000)			AS_SALES_LEADS.description

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
VEHICLE_RESPONSE_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = ’VEHICLE_RESPONSE_CODE’ and enabled_flag = ’Y’		AS_SALES_LEADS.vehicle_response_code
INTEREST_TYPE_ID_1		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_1		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.primary_interest_code_id
SECONDARY_INTEREST_CODE_ID_1		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_1		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_1		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_1		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_1		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_1		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_1		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y’		AS_SALES_LEAD_LINES.source_promotion_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
OFFER_ID_1		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = ’OFFR’		AS_SALES_LEAD_LINES.offer_id
INTEREST_TYPE_ID_2		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y’		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_2		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.primary_interest_code_id
SECONDARY_INTEREST_CODE_ID_2		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_2		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_2		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_2		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_2		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_2		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_2		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y’		AS_SALES_LEAD_LINES.source_promotion_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
OFFER_ID_2		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = ’OFFR’		AS_SALES_LEAD_LINES.offer_id
INTEREST_TYPE_ID_3		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y’		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_3		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.primary_interest_code_id
SECONDARY_INTEREST_CODE_ID_3		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_3		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_3		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_3		VARCHAR2(3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_3		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_3		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_3		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y’		AS_SALES_LEAD_LINES.source_promotion_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
OFFER_ID_3		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = ’OFFR’		AS_SALES_LEAD_LINES.offer_id
INTEREST_TYPE_ID_4		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y’		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_4		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.primary_interest_code_id
SECONDARY_INTEREST_CODE_ID_4		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_4		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_4		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_4		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_4		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_4		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_4		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y’		AS_SALES_LEAD_LINES.source_promotion_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
OFFER_ID_4		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = ’OFFR’		AS_SALES_LEAD_LINES.offer_id
INTEREST_TYPE_ID_5		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y’		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_5		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.primary_interest_code_id
SECONDARY_INTEREST_CODE_ID_5		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y’		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_5		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_5		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_5		VARCHAR2(3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_5		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_5		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_5		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y’		AS_SALES_LEAD_LINES.source_promotion_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
OFFER_ID_5		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = 'OFFR'		AS_SALES_LEAD_LINES.offer_id
LEAD_NOTE		VARCHAR2 (2000)		For creating Lead note	
LEAD_RANK_ID		NUMBER(15)	as_sales_lead_rank_vl.rank_id, meaning where enabled_flag = 'Y'	Stores the sales lead rank id. Need not supply if supplied will get validated	AS_SALES_LEADS.lead_rank_id
SOURCE_SYSTEM	Y	VARCHAR2 (250)	select lookup_code from as_lookups where lookup_type = 'SOURCE_SYSTEM' and enabled_flag = 'Y'	Stores the name/tag of the business entity which is populating the leads.	
BATCH_ID		NUMBER(15)	select as_sl_imp_batch_s.nextval from sys.dual	Batch id of the load; if provided, only the records with the same batch_id will be processing	
ORIG_SYSTEM_REFERENCE		VARCHAR2 (240)		May be populated as <orig_system_code >: <identifier> example: OTN::10100Please note that we'll use this column to find customer_key.	
ORIG_SYSTEM_CODE		VARCHAR2 (30)		Source application code where the lead originated example: OTN	
URGENT_FLAG		VARCHAR2			AS_SALES_LEADS.URGENT_FLAG
ACCEPT_FLAG		VARCHAR2			AS_SALES_LEADS.accept_flag
ASSIGN_DATE		DATE			AS_SALES_LEADS.assign_date
ASSIGN_SALES_GROUP_ID		NUMBER			AS_SALES_LEADS.assign_sales_group_id
ASSIGN_TO_PERSON_ID		NUMBER			AS_SALES_LEADS.assign_to_person_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
ASSIGN_TO_SALESFORCE_ID		NUMBER			AS_SALES_LEADS.assign_to_salesforce_id
AUTO_ASSIGNMENT_TYPE		VARCHAR2			AS_SALES_LEADS.auto_assignment_type
DELETED_FLAG		VARCHAR2			AS_SALES_LEADS.DELETED_FLAG
IMPORT_FLAG		VARCHAR2			AS_SALES_LEADS.IMPORT_FLAG
KEEP_FLAG		VARCHAR2			AS_SALES_LEADS.KEEP_FLAG
PRM_ASSIGNMENT_TYPE		VARCHAR2			AS_SALES_LEADS.PRM_ASSIGNMENT_TYPE
QUALIFIED_FLAG		VARCHAR2			AS_SALES_LEADS.QUALIFIED_FLAG
REJECT_REASON_CODE		VARCHAR2			AS_SALES_LEADS.REJECT_REASON_CODE
SCORECARD_ID		NUMBER			AS_SALES_LEADS.SCORECARD_ID
PRIMARY_CONTACT_FLAG		VARCHAR2			AS_SALES_LEAD_CONTACTS.PRIMARY_CONTACT_FLAG
ADDRESS_EFFECTIVE_DATE		DATE			HZ_LOCATIONS.address_effective_date
ADDRESS_LINES_PHONETIC		VARCHAR2			HZ_LOCATIONS.address_lines_phonetic
ADDRESS_STYLE		VARCHAR2			HZ_LOCATIONS.address_style
CONTENT_SOURCE_TYPE		VARCHAR2	select lookup_code from ar_lookups where lookup_type = 'CONTENT_SOURCE_TYPE' and enabled_flag = 'Y'	This is a mandatory column in HZ_LOCATIONS, but if not given, default it to 'USER_ENTERED'	HZ_LOCATIONS.content_source_type
LOC_DESCRIPTION		VARCHAR2			HZ_LOCATIONS.DESCRIPTION
LOC_HIERARCHY_ID		NUMBER			HZ_LOCATIONS.LOC_HIERARCHY_ID
FA_LOCATION_ID		NUMBER			HZ_LOCATIONS.FA_LOCATION_ID

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
FLOOR		VARCHAR2			HZ_LOCATIONS.FLOOR
HOUSE_NUMBER		VARCHAR2			HZ_LOCATIONS.HOUSE_NUMBER
LANGUAGE		VARCHAR2			HZ_LOCATIONS.LANGUAGE
LOCATION_DIRECTIONS		VARCHAR2			HZ_LOCATIONS.LOCATION_DIRECTIONS
PO_BOX_NUMBER		VARCHAR2			HZ_LOCATIONS.PO_BOX_NUMBER
POSITION		VARCHAR2			HZ_LOCATIONS.POSITION
POSTAL_PLUS4_CODE		VARCHAR2			HZ_LOCATIONS.POSTAL_PLUS4_CODE
SALES_TAX_GEOCODE		VARCHAR2			HZ_LOCATIONS.SALES_TAX_GEOCODE
SALES_TAX_INSIDE_CITY_LIMITS		VARCHAR2			HZ_LOCATIONS.SALES_TAX_INSIDE_CITY_LIMITS
SHORT_DESCRIPTION		VARCHAR2			HZ_LOCATIONS.SHORT_DESCRIPTION
STREET		VARCHAR2			HZ_LOCATIONS.STREET
STREET_NUMBER		VARCHAR2			HZ_LOCATIONS.STREET_NUMBER
STREET_SUFFIX		VARCHAR2			HZ_LOCATIONS.STREET_SUFFIX
SUITE		VARCHAR2			HZ_LOCATIONS.SUITE
TIME_ZONE		VARCHAR2			HZ_LOCATIONS.TIME_ZONE
LOC_VALIDATED_FLAG		VARCHAR2			HZ_LOCATIONS.VALIDATED_FLAG
DUNS_NUMBER		NUMBER			HZ_PARTIES.DUNS_NUMBER
GROUP_TYPE		VARCHAR2			HZ_PARTIES.GROUP_TYPE
GSA_INDICATOR_FLAG		VARCHAR2			HZ_PARTIES.GSA_INDICATOR_FLAG

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
HQ_BRANCH_IND		VARCHAR2	select lookup_code from ar_lookups where lookup_type = 'HQ_BRANCH_IND' and enabled_flag = 'Y'		HZ_PARTIES.HQ_BRANCH_IND
JGZZ_FISCAL_CODE		VARCHAR2			HZ_PARTIES.JGZZ_FISCAL_CODE
KNOWN_AS		VARCHAR2			HZ_PARTIES.KNOWN_AS
KNOWN_AS2		VARCHAR2			HZ_PARTIES.KNOWN_AS2
KNOWN_AS3		VARCHAR2			HZ_PARTIES.KNOWN_AS3
KNOWN_AS4		VARCHAR2			HZ_PARTIES.KNOWN_AS4
KNOWN_AS5		VARCHAR2			HZ_PARTIES.KNOWN_AS5
LANGUAGE_NAME		VARCHAR2			HZ_PARTIES.LANGUAGE_NAME
LAST_ORDERED_DATE		DATE			HZ_PARTIES.LAST_ORDERED_DATE
MISSION_STATEMENT		VARCHAR2			HZ_PARTIES.MISSION_STATEMENT
ORGANIZATION_NAME_PHONETIC		VARCHAR2			HZ_PARTIES.ORGANIZATION_NAME_PHONETIC
PARTY_NUMBER		VARCHAR2			HZ_PARTIES.PARTY_NUMBER
PERSON_FIRST_NAME_PHONETIC		VARCHAR2			HZ_PARTIES.PERSON_FIRST_NAME_PHONETIC
PERSON_IDEN_TYPE		VARCHAR2			HZ_PARTIES.PERSON_IDEN_TYPE
PERSON_IDENTIFIER		VARCHAR2			HZ_PARTIES.PERSON_IDENTIFIER
PERSON_LAST_NAME_PHONETIC		VARCHAR2			HZ_PARTIES.PERSON_LAST_NAME_PHONETIC
PERSON_NAME_SUFFIX		VARCHAR2			HZ_PARTIES.PERSON_NAME_SUFFIX

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PERSON_PREVIOUS_LAST_NAME		VARCHAR2			HZ_PARTIES.PERSON_PREVIOUS_LAST_NAME
PARTY_REFERENCE_USE_FLAG		VARCHAR2			HZ_PARTIES.reference_use_flag
SIC_CODE_TYPE		VARCHAR2	select lookup_code from ar_lookups where lookup_type = 'SIC_CODE_TYPE' and enabled_flag = 'Y'		HZ_PARTIES.SIC_CODE_TYPE
TAX_NAME		VARCHAR2			HZ_PARTIES.TAX_NAME
TOTAL_NUM_OF_ORDERS		NUMBER			HZ_PARTIES.TOTAL_NUM_OF_ORDERS
TOTAL_ORDERED_AMOUNT		NUMBER			HZ_PARTIES.TOTAL_ORDERED_AMOUNT
PARTIES_VALIDATED_FLAG		VARCHAR2			HZ_PARTIES.VALIDATED_FLAG
PS_USES_COMMENTS		VARCHAR2			HZ_PARTY_SITE_USES.COMMENTS
PRIMARY_PER_TYPE		VARCHAR2		'Y' or 'N'	HZ_PARTY_SITE_USES.PRIMARY_PER_TYPE
SITE_USE_TYPE		VARCHAR2	select lookup_code from ar_lookups where lookup_type='PARTY_SITE_USE_CODE' and enabled_flag = 'Y'	This is a mandatory column for HZ_PARTY_SITE_USES. But if not given, it will be defaulted to 'BILL_TO'	HZ_PARTY_SITE_USES.SITE_USE_TYPE
ADDRESSEE		VARCHAR2			HZ_PARTY_SITES.addressee
MAILSTOP		VARCHAR2			HZ_PARTY_SITES.MAILSTOP
PARTY_SITE_NAME		VARCHAR2			HZ_PARTY_SITES.PARTY_SITE_NAME
PARTY_SITE_NUMBER		VARCHAR2		Can be populated ONLY when profile "HZ: Generate Party Number" set to 'N'	HZ_PARTY_SITES.PARTY_SITE_NUMBER
ORG_CNT_COMMENTS		VARCHAR2			HZ_ORG_CONTACTS.comments

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
CONTACT_NUMBER		VARCHAR2			HZ_ORG_CONTACTS. CONTACT_NUMBER
DECISION_MAKER_ FLAG		VARCHAR2			HZ_ORG_CONTACTS. DECISION_MAKER_F LAG
DEPARTMENT		VARCHAR2			HZ_ORG_CONTACTS. DEPARTMENT
DEPARTMENT_COD E		VARCHAR2	select lookup_code from ar_lookups where lookup_type='DEPART MENT_TYPE' and enabled_flag = 'Y'		HZ_ORG_CONTACTS. DEPARTMENT_CODE
RANK		VARCHAR2			HZ_ORG_CONTACTS. RANK
PROMOTION_ID		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'	If given, this is used for creating the sales lead header.	AS_SALES_LEADS.sou rce_promotion_id
ROLE_LEVEL		VARCHAR2 (30)			HZ_ORG_CONTACT_ ROLES.role_level
PRIMARY_CONTACT _PER_ROLE_TYPE		VARCHAR2 (1)		'Y' or 'N'	HZ_ORG_CONTACT_ ROLES.primary_contac t_per_role_type
CNT_PNT_CONTEN T_SOURCE_TYPE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type ='CONTENT_SOURCE_ TYPE' and enabled_flag = 'Y'	This is a mandatory column in HZ_CONTACT_POINT S, but if not given, default it to 'USER_ENTERED	'HZ_CONTACT_POIN TS.CONTENT_SOURC E_TYPE
PHONE_COUNTRY_ CODE		VARCHAR2 (30)			HZ_CONTACT_POINT S.PHONE_COUNTRY_ CODE
FAX_COUNTRY_CO DE		VARCHAR2 (30)			HZ_CONTACT_POINT S.PHONE_COUNTRY_ CODE
PHONE_CALLING_C ALENDAR		VARCHAR2 (30)			HZ_CONTACT_POINT S.PHONE_CALLING_ CALENDAR
CNT_PNT_TIME_ZO NE		NUMBER			HZ_CONTACT_POINT S.TIME_ZONE
RAW_PHONE_NUM BER		VARCHAR2 (60)			HZ_CONTACT_POINT S.RAW_PHONE_NUM BER

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
EMAIL_FORMAT		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type=’EMAIL_FORMAT’ and enabled_flag = ’Y’		HZ_CONTACT_POINTS.EMAIL_FORMAT
FAX_EXTENSION		VARCHAR2 (20)			HZ_CONTACT_POINTS.phone_extension
ORG_CNT_TITLE		VARCHAR2	select lookup_code from ar_lookups where lookup_type='CONTACT_TITLE' and enabled_flag = 'Y’		HZ_ORG_CONTACTS.title
OFFER_ID		NUMBER	select source_code_id from ams_source_codes where ARC_SOURCE_CODE_FOR = 'OFFR’		AS_SALES_LEAD.offer_id
PROMOTION_CODE		VARCHAR2 (50)	select source_code from ams_source_codes where active_flag = 'Y’	If given and promotion_id is not provided, then this will be transferred to promotion_id.	AS_SAELS_LEADS.source_promotion_id
PARTY_ID		NUMBER(15)		Party Id to which the customer info is mapped	
PARTY_SITE_ID		NUMBER(15)		Party Site Id to which the party and location info is mapped	
LOCATION_ID		NUMBER(15)		Location Id to which address info is mapped	
CONTACT_PARTY_ID		NUMBER			HZ_CONTACT_RELATIONSHIPS.subject_id
REL_PARTY_ID		NUMBER(15)		Relationship's party ID to which the relationship is mapped.	AS_SALES_LEAD_CONTACTS.contact_party_id & HZ_CONTACT_POINTS.owner_table_id & HZ_CONTACT_RESTRICTIONS.subject_id & HZ_CONTACT_POINTS.owner_table_id

Additional Columns in the Interface Table Only

The columns in the following table are present in the interface table but not in the control file. Most of these columns are obsolete.

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
REQUEST_ID		NUMBER		]	
PROGRAM_APPLICATION_ID		NUMBER		] DO NOT POPULATE	
PROGRAM_ID		NUMBER		] Concurrent process generated	
PROGRAM_UPDATE_DATE		DATE		]	
LOAD_ERROR_MESSAGE		VARCHAR2 (2000)		Currently, not used. To find the error messages, query from as_lead_import_errors	
PHONE_ID		NUMBER		DO NOT POPULATE	AS_SALES_LEAD_CONTACTS.phone_id
SECURITY_GROUP_ID		NUMBER			
NET_WORTH		NUMBER		free text format	
LEAD_NUMBER		VARCHAR2 (30)			AS_SALES_LEADS.lead_number
PRM_SALES_LEAD_TYPE		VARCHAR2 (30)		Partner specific	
PRM_EXEC_SPONSOR_FLAG		VARCHAR2 (1)		Partner specific	
PRM_PRJ_LEAD_IN_PLACE_FLAG		VARCHAR2 (1)		Partner specific	
INCUMBENT_PARTNER_PARTY_ID		NUMBER		Partner specific	
INCUMBENT_PARTNER_RESOURCE_ID		NUMBER		Partner specific	
PRM_IND_CLASSIFICATION_CODE		VARCHAR2 (30)		Partner specific	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PARTY_TYPE		VARCHAR2 (30)		If not given, it will be defaulted to 'ORGANIZATION', if it is given but it's neither'ORGANIZATION' nor 'PERSON', will raise error	HZ_PARTIES.party_type
SALES_LEAD_ID		NUMBER(15)		<< DO NOT POPULATE >> Sales Lead ID to which the sales lead info is mapped.	AS_SALES_LEADS.sales_lead_id & AS_SALES_LEAD_LINES.sales_lead_id & AS_SALES_LEAD_CONTACTS.sales_lead_id
CUSTOMER_KEY		VARCHAR2 (50)		Stores the customer Key generated	
ADDRESS_KEY		VARCHAR2 (500)		Stores the Address Key generated	
CONTACT_KEY		VACHAR2(80)		Stores the Contact Key generated	
NEW_PARTY_FLAG		NUMBER(1)		<< DO NOT POPULATE >> If 1 - party is newly created. If 0, existing party is used.	
NEW_LOC_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - this is a new location. If 0- this is already existing.	
NEW_PS_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - new PS, if 0 - PS already existing	
NEW_REL_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - new relationship, 0- existing Rel	
NEW_CON_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - new contact, 0- existing Contact	
HZ_PARTYID		NUMBER			AS_SALES_LEAD_CONTACTS.CUSTOMER_ID

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
HZ_PSID		NUMBER			AS_SALES_LEAD_CONTACTS.ADDRESS_ID
The following columns are obsolete:					
IMP_LIST_HEADER_NUMBER		VARCHAR2 (30)		obsolete	
CUSTOMER_ID		NUMBER(15)		obsolete	
CUSTOMER_NUMBER		VARCHAR2 (30)		obsolete	
CUSTOMER_STATUS		VARCHAR2 (1)		obsolete	
CUSTOMER_TYPE		VARCHAR2 (30)		obsolete	
CUSTOMER_PROSPECT_CODE		VARCHAR2 (30)		obsolete	
CUSTOMER_CLASS_CODE		VARCHAR2 (30)		obsolete	
SALES_CHANNEL_CODE		VARCHAR2 (30)		obsolete	
CUSTOMER_GROUP_CODE		VARCHAR2 (30)		obsolete	
CUSTOMER_SUBGROUP_CODE		VARCHAR2 (30)		obsolete	
REFERENCE_USE_FLAG		VARCHAR2 (1)		obsolete	
TAX_CODE		VARCHAR2 (50)		obsolete	
THIRD_PARTY_FLAG		VARCHAR2 (1)		obsolete	
COMPETITOR_FLAG		VARCHAR2 (1)		obsolete	
ADDRESS_ID		NUMBER(15)		obsolete	
ADDRESS_STATUS		VARCHAR2 (1)		obsolete	
SITE_CONTACT_ID		NUMBER(15)		obsolete	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PHONE_STATUS		VARCHAR2 (1)		obsolete	
SOURCE_PROMOTION_ID		NUMBER		obsolete	
INITIATING_CONTACT_ID		NUMBER		obsolete	
LEAD_RANK_CODE		VARCHAR2 (30)		obsolete	
STATUS_CODE_1		VARCHAR2 (30)		obsolete	
STATUS_CODE_2		VARCHAR2 (30)		obsolete	
STATUS_CODE_3		VARCHAR2 (30)		obsolete	
STATUS_CODE_4		VARCHAR2 (30)		obsolete	
STATUS_CODE_5		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_1		VARCHAR2 (2000)		obsolete	
PRIORITY_1		NUMBER(3)		obsolete	
TODO_DATE_1		DATE		obsolete	
TODO_START_TIME_1		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_1		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_2		VARCHAR2 (2000)		obsolete	
PRIORITY_2		NUMBER(3)		obsolete	
TODO_DATE_2		DATE		obsolete	
TODO_START_TIME_2		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_2		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_3		VARCHAR2 (2000)		obsolete	
PRIORITY_3		NUMBER(3)		obsolete	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
TODO_DATE_3		DATE		obsolete	
TODO_START_TIME_3		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_3		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_4		VARCHAR2 (2000)		obsolete	
PRIORITY_4		NUMBER(3)		obsolete	
TODO_DATE_4		DATE		obsolete	
TODO_START_TIME_4		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_4		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_5		VARCHAR2 (2000)		obsolete	
PRIORITY_5		NUMBER(3)		obsolete	
TODO_DATE_5		DATE		obsolete	
TODO_START_TIME_5		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_5		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_6		VARCHAR2 (2000)		obsolete	
PRIORITY_6		NUMBER(3)		obsolete	
TODO_DATE_6		DATE		obsolete	
TODO_START_TIME_6		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_6		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_7		VARCHAR2 (2000)		obsolete	
PRIORITY_7		NUMBER(3)		obsolete	
TODO_DATE_7		DATE		obsolete	
TODO_START_TIME_7		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_7		VARCHAR2 (30)		obsolete	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
INTERACTION_NOTES_8		VARCHAR2 (2000)		obsolete	
PRIORITY_8		NUMBER(3)		obsolete	
TODO_DATE_8		DATE		obsolete	
TODO_START_TIME_8		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_8		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_9		VARCHAR2 (2000)		obsolete	
PRIORITY_9		NUMBER(3)		obsolete	
TODO_DATE_9		DATE		obsolete	
TODO_START_TIME_9		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_9		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_10		VARCHAR2 (2000)		obsolete	
PRIORITY_10		NUMBER(3)		obsolete	
TODO_DATE_10		DATE		obsolete	
TODO_START_TIME_10		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_10		VARCHAR2 (30)		obsolete	
NUM_ENROLLED		NUMBER(5)		obsolete	
CONFIRMED_FLAG		VARCHAR2 (1)		obsolete	
PAYMENT_AMOUNT		NUMBER		obsolete	
NUM_ATTENDED		NUMBER(5)		obsolete	
PROMOTION_NAME		VARCHAR2 (240)		obsolete	
STATUS_CHANGE_FLAG		VARCHAR2 (1)		obsolete	

5.9.10 How to Import Flexfields

Use AS_IMP_SL_FLEX table to store the flexfield values for all the following entities (tables). Entity names are seeded in AS_LOOKUPS, lookup_type = 'ENTITY_NAME'.

- HZ_PARTIES
- HZ_LOCATIONS
- HZ_CONTACT_POINTS
- HZ_PARTY_SITES
- HZ_ORG_CONTACTS
- AS_SALES_LEADS
- AS_SALES_LEAD_LINES
- AS_SALES_LEAD_CONTACTS

The flexfields are imported along with other data in AS_IMPORT_INTERFACE during lead import process.

A composite key, IMPORT_INTERFACE_ID and ENTITY_NAME, is the unique key in this table.

Entity names are seeded in AS_LOOKUPS, lookup_type='ENTITY_NAME'.

5.9.11 Understanding and Extending the Lead Import Program

This topic explains the function of the Lead Import program and where you can extend it using built-in user hooks.

What the Program Does

The program:

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

Note: The concurrent program checks for duplicate customer records by comparing the data being imported and existing customer records.

It does not check for duplicates other data you are importing. This means that if you have duplicate entries in the leads you import, the program will create duplicates in the database.

A user hook is available for extending the program to check for duplicate leads. See Checking for Duplicate Leads on page 5-96.

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

Note: You must set OS: Default Resource ID Used for Lead Assignment to a resource that has been set up with a sales role in Resource Manager. If you do not assign a valid resource in this profile, then the ownership of unassigned leads is transferred to the user importing the leads. If that user is also not set up in Resource Manager, then leads you import will not be accessible from either Oracle Sales Online or Oracle TeleSales.

Note: If you are not using the Territory Manager, then you can route leads by populating the assign to ID in the interface table directly. The Lead Import program does not overwrite values you enter into the table.

You can also use a user hook to extend the lead import program to route leads to the appropriate owner. See Lead Routing Engine on page 5-46)

Program Flow

Lead import follows the steps outlined below:

1. It populates customer keys, address keys, and contacts keys in interface table.
2. It creates TCA (customer model) data.
3. It creates leads.
4. It ranks the leads.
5. It assigns leads to lead owners and populates the lead sales teams.
6. It creates the customer sales teams.

5.9.12 User Hook for Customizing Duplicate Lead Checking

User hooks permit you to bypass Oracle code and implement custom code instead. The following user hook can be used to implement custom code to check for duplicate leads.

Checking for Duplicate Leads

Hook name: IS_DUPLICATE_LEAD

Package Name: AS_IMPORT_SL_CUHK

Purpose

While importing leads, the lead import program does not check for duplicate leads in Oracle sales applications. This means that duplicate leads can be created by the import process.

If you want to implement custom lead duplicate checking, then write a package according to the following specifications.

The lead import program will either create a new lead or skip a lead import record based on the value returned by your program. If the record is skipped, then no lead will be created and load_status of that lead import record will be set to ’DUPLICATE’.

Please do not commit in the package body. After the transaction is completed, Oracle Application code will issue a commit.

This user hook will be called by the lead import program.

Calling package

AS_IMPORT_SL_PVT.Is_Duplicate_Lead

API name

Is_Duplicate_Lead_Pre

In parameters

The four parameters below are standard input:

Parameter	Description
p_api_version_number	For 11i Oracle Sales application, this is 2.0.
p_init_msg_list	Initialize message stack or not. This is set to FND_API.G_FALSE by default.
p_validation_level	Validation level for pass-in values. Set to FND_API.G_VALID_LEVEL_FULL by default.
p_commit	Whether commit the whole API at the end of API. Set to FND_API.G_FALSE by default.

The following parameter does not have a standard input:

Parameter	Description
p_import_interface_id	This is the import interface identifier. Pass into import_interface_id of the lead import record for which you want to perform the lead existence checking.

Out Parameters

Parameter	Description
x_duplicate_flag	If this flag is 'Y', this indicates the lead import record is duplicate and is not going to be imported. 'N' means such a lead does not exist and lead will be imported.

The following three parameters are standard output parameters.

Parameter	Description
x_return_status	The return status. If your code completes successfully, then FND_API.G_RET_STS_SUCCESS must be returned. If you get an expected error, then return FND_API.G_RET_STS_ERROR, otherwise return FND_API.G_RET_STS_UNEXP_ERROR.
x_msg_count	The message count. Call FND_MSG_PUB.Count_And_Get to get the message count and messages.
x_msg_data	The messages. Call FND_MSG_PUB.Count_And_Get to get the message count and messages.

5.9.13 How Lead Import Checks for Duplicates

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

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

The TCA APIs use the word replacement rules to create fuzzy keys. The lead import program then uses these fuzzy keys to check for duplicate data.

The program assumes that customer_key, and address_key in HZ tables have already been generated. (See Section 5.9.5, "Setting Up Lead Import" on page 5-63.)

Lead import program uses hz_fuzzy_pub.Generate_Key to generate customer_key, address_key, and contact_key for the rows with same batch_id in as_import_interface table.

Note: If you are importing leads from a third party system, then you can pass on the unique customer identifiers from that system using ORIG_SYSTEM_REFERENCE. If you do so, then the lead import program checks for duplicates based on the identifier only and does not perform any of the existence checking steps listed below.

CUSTOMER_KEY

The lead import program generates the customer key as follows:

1. If the ORIG_SYSTEM_REFERENCE column is populated in the AS_IMPORT_INTERFACE table, then the lead import program uses only this value to generate the customer key. It does not perform any of the steps listed below.
2. If the ORIG_SYSTEM_REFERENCE column is null, then the lead import program:
   a. Gets m words from party_name (m defined in profile: HZ_KEY_WORD_COUNT)
   b. Replaces the words defined in the word replacement form
   c. Removes noise words

ADDRESS_KEY

The lead import program generates the address key as follows:

1. Replaces address1 with words defined in word replacement form
2. Gets m characters from the replaced address1 (m defined in profile: HZ_ADDRESS_KEY_LENGTH) => key1
3. Replaces postal_code with words defined in word replacement form
4. Gets n characters from the replaced address1 (n defined in profile: HZ_POSTAL_CODE_KEY_LENGTH) =>key2)
5. If key2 is not null, then address_key = key1 + ’.’ + key2; else address_key = key1

CONTACT_KEY

The lead import program generates the contact key as follows:

1. If the party type is not organization, then the program does not generate a contact key and skips the rest of the steps below.
2. If the party type is organization, then the program:
   a. Replaces last_name with words defined in word replacement form =>key1
   b. If first_name is not null, then the program replaces the first_name with words defined in word replacement form => key2
   c. If key2 is not null, then contact_key = key1 + ’.’ + key2; else contact_key = key1

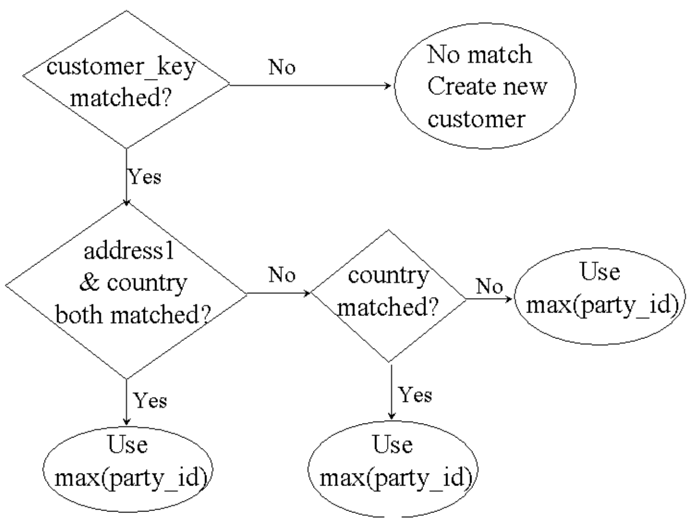
Duplicate Checking for Customer Records

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

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

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

The following diagram shows the process flow.



If the ORIG_SYSTEM_REFERENCE column in AS_IMPORT_INTERFACE is populated, then the lead import program uses this as the customer key. Be careful in populating this column.

What follows is an example of how wrong values generate the wrong customer key.

In HZ_PARTIES:

PARTY_ID	PARTY_NAME	CUSTOMER_KEY	ORIG_SYSTEM_REFERENCE
10001	ABC Corp.	ABC	OTN::1501
10002	QQQ Corp.	QQQ	OTN::1505
10003	XYZ Corp.	XYZ	XBN::678

In AS_IMPORT-INTERFACE:

PARTY_ID	PARTY_NAME	ORIG_SYSTEM_REFERENCE
10001	QQQ Corp.	OTN::1501

The CUSTOMER_KEY for this record is ABC (incorrect) instead of QQQ (correct).

Duplicate Checking for Addresses

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

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

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

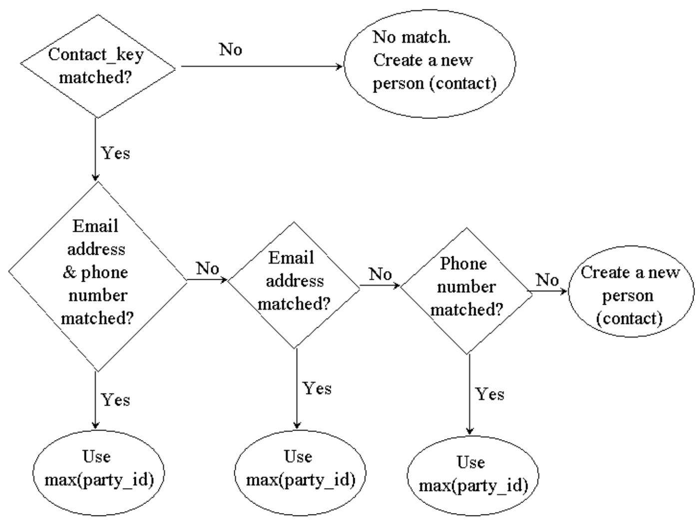
Once the location_id is created, the program finds out whether a party site exists for the combination of this location_id and party_id. If such party site already exists, then the lead is created for that party_site_id. If not, then a new party site is created using TCA API.

Duplicate Checking for Contacts

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

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

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



Contact Restrictions

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

No existence checking is done.

Contact Points

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

Limitations

Contact existence checking is done based only on email, address, and phone number populated in the AS_IMPORT_INTERFACE table. The lead import program does not consider the contact points in AS_IMP_CNT_PNT_INTERFACE table for contact existence checking.

If the extension is not populated then contacts with the same name within one organization may not be identified.Tables for Multiple Contact Roles

AS_IMP_CTL_ROL_INTERFACE

The following table lists the columns in the table AS_IMP_CNT_ROL_INTERFACE. Any values you populate in this interface table is imported along with the values in the main interface table.

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMP_CNT_ROL_INTERFACE_ID	NOT NULL	NUMBER			
IMPORT_INTERFACE_ID	NOT NULL	NUMBER			
LAST_UPDATE_DATE	NOT NULL	DATE		Standard Who column	
LAST_UPDATED_BY	NOT NULL	NUMBER		Standard Who column	
CREATION_DATE	NOT NULL	DATE		Standard Who column	
CREATED_BY	NOT NULL	NUMBER		Standard Who column	
LAST_UPDATE_LOGIN	NOT NULL	NUMBER		Standard Who column	
REQUEST_ID		NUMBER			

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PROGRAM_APPLICATION_ID		NUMBER		Application identifier of last concurrent program	
PROGRAM_ID		NUMBER		Identifier of last concurrent program to update re	
PROGRAM_UPDATE_DATE		DATE		Last date concurrent program updated record	
ORG_CONTACT_ID		NUMBER		DO NOT POPULATE	
ORG_CONTACT_ROLE_ID		NUMBER		DO NOT POPULATE	
ORIG_SYSTEM_REFERENCE		VARCHAR2(240)			HZ_ORG_CONTACT_ROLES.orig_system_reference
PRIMARY_CONTACT_PER_ROLE_TYPE		VARCHAR2(1)	’Y’ or ’N		’HZ_ORG_CONTACT_ROLES.primary_contact_per_role_type
PRIMARY_FLAG		VARCHAR2(1)	’Y’ or ’N		’HZ_ORG_CONTACT_ROLES.primary_flag
ROLE_LEVEL		VARCHAR2(30)			HZ_ORG_CONTACT_ROLES.role_level
ROLE_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = ’CONTACT_ROLE_TYPE		’HZ_ORG_CONTACT_ROLES.role_type

AS_IMP_CNT_PNT_INTERFACE

The following table lists the columns in the table AS_IMP_CNT_PNT_INTERFACE. Any values you populate in this interface table is imported along with the values in the main interface table.

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMP_CNT_PNT_INTERFACE_ID	NOT NULL	NUMBER			
IMPORT_INTERFACE_ID	NOT NULL	NUMBER			
OWNER_TYPE	NOT NULL	VARCHAR2(30)		’CONTACT’ or ’PERSON	’
PARTY_ID		NUMBER		Person’s party ID	
LAST_UPDATE_DATE	NOT NULL	DATE		Standard Who column	
LAST_UPDATED_BY	NOT NULL	NUMBER		Standard Who column	
CREATION_DATE	NOT NULL	DATE		Standard Who column	
CREATED_BY	NOT NULL	NUMBER		Standard Who column	
LAST_UPDATE_LOGIN	NOT NULL	NUMBER		Standard Who column	
REQUEST_ID		NUMBER			
PROGRAM_APPLICATION_ID		NUMBER		Application identifier of last concurrent program	
PROGRAM_ID		NUMBER		Identifier of last concurrent program to update re	

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PROGRAM_UPDATE_DATE		DATE		Last date concurrent program updated record	
ORIG_SYSTEM_REFERENCE		VARCHAR2(240)			HZ_CONTACT_POINTS.orig_system_reference
CONTACT_POINT_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type ='COMMUNICATION_TYPE		'HZ_CONTACT_POINTS.CONTACT_POINT_TYPE
EMAIL_FORMAT		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type ='EMAIL_FORMAT		'HZ_CONTACT_POINTS.EMAIL_FORMAT
EMAIL_ADDRESS		VARCHAR2(2000)			HZ_CONTACT_POINTS.EMAIL_ADDRESS
WEB_TYPE		VARCHAR2(60)			HZ_CONTACT_POINTS.WEB_TYPE
URL		VARCHAR2(2000)			HZ_CONTACT_POINTS.URL

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PHONE_LINE_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = 'PHONE_LINE_TYPE		'HZ_CONTACT_POINTS.PHONE_LINE_TYPE
PHONE_COUNTRY_CODE		VARCHAR2(30)			HZ_CONTACT_POINTS.PHONE_COUNTRY_CODE
PHONE_AREA_CODE		VARCHAR2(40)			HZ_CONTACT_POINTS.PHONE_AREA_CODE
PHONE_NUMBER		VARCHAR2(240)			HZ_CONTACT_POINTS.PHONE_NUMBER
PHONE_EXTENSION		VARCHAR2(20)			HZ_CONTACT_POINTS.PHONE_EXTENSION
RAW_PHONE_NUMBER		VARCHAR2(60)			HZ_CONTACT_POINTS.RAW_PHONE_NUMBER
OWNER_TABLE_NAME		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = 'OWNER_TABLE_NAME	'If not given, use 'HZ_PARTIES	'HZ_CONTACT_POINTS.OWNER_TABLE_NAME
OWNER_TABLE_ID		NUMBER		If not given, use relationship's party id for party_type='ORGANIZATION'; or party id for others	HZ_CONTACT_POINTS.OWNER_TABLE_ID

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PRIMARY_FLAG		VARCHAR2(1)			HZ_CONTACT_POINTS.PRIMARY_FLAG
CONTENT_SOURCE_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type ='CONTENT_SOURCE_TYPE		'HZ_CONTACT_POINTS.CONTENT_SOURCE_TYPE
PHONE_CALLING_CALENDAR		VARCHAR2(30)			HZ_CONTACT_POINTS.PHONE_CALLING_CALENDAR
TELEX_NUMBER		VARCHAR2(50)			HZ_CONTACT_POINTS.TELEX_NUMBER
TIME_ZONE		NUMBER			HZ_CONTACT_POINTS.TIME_ZONE
CONTACT_POINT_PURPOSE		VARCHAR2(30)	if contact_point_type <> 'WEB': select lookup_code from ar_lookups where lookup_type = 'CONTACT_POINT_PURPOSE		'HZ_CONTACT_POINTS.WH_UPDATE_DATE
PRIMARY_BY_PURPOSE		VARCHAR2(30)		'Y' or 'N	'

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
TRANSPOSED_PHONE_NUMBER		VARCHAR2(60)			

AS_IMP_LINES_INTERFACE

The following table lists the columns in the table AS_IMP_LINES_INTERFACE. Any values you populate in this interface table is imported along with the values in the main interface table.

Column	Can Leave NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMP_LINES_INTERFACE_ID	NOT NULL	NUMBER			
IMPORT_INTERFACE_ID	NOT NULL	NUMBER			
LAST_UPDATE_DATE	NOT NULL	DATE		Standard Who column	
LAST_UPDATED_BY	NOT NULL	NUMBER		Standard Who column	
CREATION_DATE	NOT NULL	DATE		Standard Who column	
CREATED_BY	NOT NULL	NUMBER		Standard Who column	
LAST_UPDATE_LOGIN	NOT NULL	NUMBER		Standard Who column	
REQUEST_ID		NUMBER			
PROGRAM_APPLICATION_ID		NUMBER		Application identifier of last concurrent program	
PROGRAM_ID		NUMBER		Identifier of last concurrent program to update re	

Column	Can Leave NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PROGRAM_UPDATE_DATE		DATE		Last date concurrent program updated record	
INTEREST_TYPE_ID	NOT NULL		select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = ’Y’ and EXPECTED_PURCHASE_FLAG = ’Y		’AS_SALES_LEAD_LINES.INTEREST_TYPE_ID
PRIMARY_INTEREST_CODE_ID			select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = ’Y		’AS_SALES_LEAD_LINES.PRIMARY_INTEREST_CODE_ID
SECONDARY_INTEREST_CODE_ID			select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = ’Y		’AS_SALES_LEAD_LINES.SECONDARY_INTEREST_CODE_ID

Column	Can Leave NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
INVENTORY_ITEM_ID			select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.INVENTORY_ITEM_ID
ORGANIZATION_ID					AS_SALES_LEAD_LINES.ORGANIZATION_ID
UOM_CODE			select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.UOM_CODE
QUANTITY					AS_SALES_LEAD_LINES.QUANTITY
BUDGET_AMOUNT					AS_SALES_LEAD_LINES.BUDGET_AMOUNT
SOURCE_PROMOTION_ID			select source_code_id from ams_source_codes where active_flag = ’Y		’AS_SALES_LEAD_LINES.SOURCE_PROMOTION_ID
OFFER_ID			select source_code_id from ams_source_codes where active_flag = ’Y’ and ARC_SOURCE_CODE_FOR = ’OFFR		’AS_SALES_LEAD_LINES.OFFER_ID

5.9.14 Lead Import Errors Table Structure

The following table lists the columns in the AS_LEAD_IMPORT_ERRORS table which stores error messages recorded during lead import:

Column	Can leave NULL?	Data Type	Comments
LEAD_IMPORT_ERROR_ID	Not Null	NUMBER	
LAST_UPDATED_BY	Not Null	NUMBER	Standard who column
LAST_UPDATE_DATE	Not Null	DATE	Standard who column
CREATION_DATE	Not Null	DATE	Standard who column
CREATED_BY	Not Null	NUMBER	Standard who column
LAST_UPDATE_LOGIN	Not Null	NUMBER	Standard who column
IMPORT_INTERFACE_ID	Not Null	NUMBER	
BATCH_ID	Not Null	NUMBER	
ERROR_TEXT		VARCHAR2(2000)	Stores error messages from lead import
SECURITY_GROUP_ID		NUMBER	
REQUEST_ID		NUMBER	
PROGRAM_APPLICATION_ID		NUMBER	
PROGRAM_ID		NUMBER	
PROGRAM_UPDATE_DATE		DATE	

5.9.15 Sequence Generators

The following functions generate sequences for lead import tables.

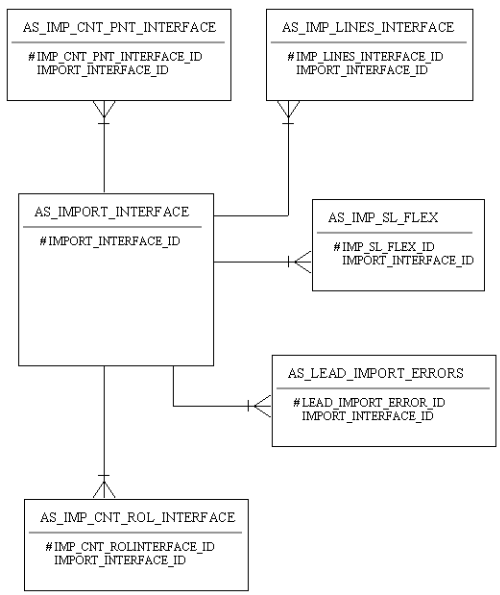
- AS_SL_IMP_BATCH_S: Populates the batch id.

> **Note:** Any program used to populate the interface tables must use AS_SL_IMP_BATCH_S to generate the sequence for any given batch. All the records in a batch must have THE SAME BATCH ID. The value must be same.

- AS_LEAD_IMPORT_ERRORS_S: Populates the PK for AS_LEAD_IMPORT_ERRORS table.
- AS_IMP_SL_FLEX_S: Populates the PK for AS_IMP_SL_FLEX table.

- AS_IMPORT_INTERFACE_S: Can be used to populate the PK for AS_IMPORT_INTERFACE_S.
- AS_IMP_CNT_ROL_INTERFACE_S: Can be used to populate the PK for AS_IMP_CNT_ROL_INTERFACE.
- AS_IMP_CNT_PNT_INTERFACE_S: Can be used to populate the PK for AS_IMP_CNT_PNT_INTERFACE.
- AS_IMP_LINES_INTERFACE_S: Can be used to populate the PK for AS_IMP_LINES_INTERFACE.

5.9.16 Database Design



5.10 Setting Up Opportunities and Forecasting

Applies to: Sales Online, TeleSales, Field Sales

Setting up opportunities and forecasting consists of:

5.10.1 Setting Up Opportunity and Forecasting Profiles

Opportunity and forecasting classifications are governed by the following profiles:

Forms Navigation

Old Setup > System Profiles

The following opportunity and forecasting profiles determine how Sales Online, TeleSales and Field Sales products behave.

Set the following profiles:

- **OSO: Enable Lead Share:** Display Lead Share button
- **OS: Inventory Category Integration**: Flag to populate Inventory categories in Oracle Sales
- **OS: Compensation Sales Credit Type:** Compensation Sales Credit Type (mandatory)

- **OS: Address Required for Opportunity:** Customer address required for opportunity.
- **OS: Address Required for Organization:** Customer address required for opportunity.
- **OS: Address Required for Person:** Customer address required for opportunity.
- **OS: Address Required for Sales Lead:** Customer address required for opportunity.
- **OS: Default Close Date Days**: Default Opportunity Close Date days (Value + Current Date = Opportunity Close Date)
- **OS: Default Opportunity Sales Stage**: Default Sales Stage
- **OS: Default Opportunity Status**: Default Opportunity Status
- **OS: Default Opportunity Win Probability**: Default Opportunity Win Probability
- **OS: Default Sales Channel**: Default Sales Channel
- **OS: Generate Opportunity System Notes**: Determines whether or not notes are generated when parts of the opportunity change.
- **OS: Maximum Roll Days for Converting Amount:** Maximum Roll Days for Converting Amount if no conversion rate for a day.
- **OS: Opportunity Probability Link**: Determines whether a warning or an error is given if the win probability amount does not fall within the sales stage probabilities. The warning is turned on by default.
- **OS: Opportunity Sales Credit Enforced Sales Team Definition**: Opportunity Sales Credit Enforced Sales Team Definition
- **OS: Sales Methodology**: Sales methodology
- **OS: Sales Team Creator Keep Flag**: Default keep flag for sales team creator.
- **OS: Forecast Sales Credit Type**: Sets the default forecast sales credit type
- **OS: Daily Conversion Type**: Currency conversion type used for daily conversion rates.
- **OS: Date Mapping Type of a Period for Pseudo Period Rates**: Indicates whether the first or last date of the period is used for calculating pseudo period rates.

- **OS: Allow Updating Frozen Opportunities**: When set to yes, users can update frozen opportunities.
- **OSO: Oracle Internal**
- **OSO: Display Bubble Train**
- **OSO: Enable Quote**
- **OSO: Display Opportunity Competitors in Detail**

Forecasting Profiles

- **OSO: Default Forecast Currency:** Default currency used for forecasting.
- **OSO: Default Forecast Period Type:** Default period used for forecasting.
- **OSO: Default Forecast Worksheet Lines**: Choose to default worksheet lines to zero or pipeline.
- **OSO: Display Subordinate Current Pipeline:** Choose to display subordinate current pipeline.
- **OSO: Display Opportunity Worksheet Grand Totals:** Choose to display worksheet grand totals.
- **OSO: Forecast Calendar Month:** Choose the forecast calendar month.
- **OS: Forecast Calendar**: The name of the calendar being used to manage forecasts.
- **OS: Use Forecast Materialized View:** If set to yes, materialized views will be used for forecasting.
- **OS: Forecast Category:**
- **OSO: Forecast Max Generate Months:** Maximum number of months generated when generating multiple forecasts.

5.10.2 Creating Win Probabilities

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

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

Use the following procedure to define or modify Win Probabilities.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Opportunity > Win Probability

Steps

The Win Probabilities page opens.

1. To find a win probability:
   a. Enter the win probability number in the Win Probability field.
   b. Optionally, enter the Meaning.
   c. Click **Search**.
2. To create a new probability:
   a. Click in a **Win Probability** field in a new row. This is a required field.
   b. Enter a Value between 0 and 100.
   c. Enter or change the information in the **Meaning** field.
   a. Select a Start Date in the **From** field by clicking the Calendar icon. This is a required field.
3. Optionally, enter an End Date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
4. 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.
5. Click **Update** to save your work.

5.10.3 Defining or Modifying Sales Stages

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

Use the following procedure to define or modify Sales Stages.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Opportunity > Sales Stage

Steps

The Sales Stages Window appears.

1. To find an existing Sales Stage:
   a. Enter the sales stage name in the Name field.
   b. Optionally, enter a Description.
   c. Click **Search**.
2. To enter a new Sales Stage:
   a. Click in a **Name** field in a new row. This is a required field.
   b. Enter a description
   c. Enter a minimum and a maximum win probability value for this stage in the **Min** and **Max** fields. These are required fields.
   d. Select a start date in the **From** field by clicking the Calendar icon and choosing a date. This is a required field.
   e. Optionally, select an end date for the **To** field. If an end date is selected, the Sales Stage will be disabled after that date.
3. Click the **Enabled** checkbox to enable the Sales Stage. If the **Enabled** box is not checked, the Sales Stage will not be enabled.
4. Click **Update** to save your work.

5.10.4 Setting Up 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)
- YR (year)
- 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 AS/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.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Opportunity > Sales Methodology

Steps

The Sales Methodology Summary page opens.

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. Select the "Create Tasks for All Sales Stages" check box to create all the tasks for all sales stages when the sales methodology is selected for an opportunity. If the flag is not selected, tasks are created for only those sales stages selected by the opportunity.
7. Enter the Sequence that with which you want the sales stage to follow. This is a required field.
8. Select a Sales Stage from the drop down list. This is a required field.
9. Optionally, select a Task Template Group from the drop down list.
10. Select a Minimum Win Probability from the drop down list. This is a required field.
11. Select a Maximum Win Probability from the drop down list. This is a required field.
12. 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.

5.10.5 Setting Up the Calendar

You must set up a calendar for forecasting. Define a calendar that represents your organizations fiscal cycles.

Forms Navigation

Old Setup > Opportunities > Calendar

Steps

1. Navigate to **Old Setup > Opportunities > Calendar > Types** and define your period types. For example, month, quarter, and year.

2. Navigate to **Old Setup > Opportunities > Calendar > Accounting** and define your accounting calendar.

Refer to the *General Ledger Users Guide* for more information.

5.10.6 Defining Credit Types in Order Management

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

Forms Navigation

Order Management > Sales Credit Type

Steps

The Sales Credit Type window appears.

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

5.10.7 Setting Up Opportunity Status

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

Use the following procedure to define Opportunity Status.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Opportunity > Status Codes

Steps

1. To search for a Status Code:
   a. Enter the Status Code.
   b. Enter the Meaning
   c. Enter the Description.
2. To create a new Status Code:
   a. Click the **Create** button.
   b. Enter a Status Code.
   c. Enter a Meaning.
   d. Enter a Description.
   e. Select the "Enabled" checkbox to activate the opportunity status.
   f. 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 that the opportunity is closed and the transaction requires a close reason to be entered.
   g. Select the "Include in Forecast" checkbox to include the status in forecasts.
   h. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox.
   i. 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, lost, or neither.
   j. Click **Create**.
3. Click **Update** to save your work.

5.10.8 Setting Up 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 Code
    - Secondary Interest Code

Use the following procedure to define Interest Types.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Sales Category > Interest Types

Steps

The Interest Types page opens.

1. To search for an Interest Type:
   a. Select a **Type** from the drop down list.
   b. Enter a **Description**.
   c. 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). Only interest types with both the Expected Purchase and Globally Enabled check boxes selected will be able to load to inventory category.
   d. Click **Search**.
2. To create a new Interest Type:
   a. Select the first blank Type field and enter the name of the new interest type. This is a required field.
   b. Optionally, enter a description.

c. 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: Sales Online does **not** use interest types to classify customers. Sales Online uses the Trading Community Architecture (TCA) Customer Classification lookup. See the Lookup section of this document.

d. Select the Globally Enabled checkbox to indicate that the classification is to be activated throughout the entire implementation. 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.

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

   Please note, you cannot delete interest types because an interest type may be related to transaction records.

5.10.9 Setting Up Interest Codes

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

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

Use the following procedure to modify and create Interest Codes.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Sales Category > Interest Code

Steps

The Interest Codes page opens.

1. To search for an Interest Code:
   a. Select an **Interest Type** from the drop down list.
   b. Click **Search**.
2. To create a new Primary Interest Code:
   a. Enter the interest code for the I**nterest Type** you want to set up. This is a required field.
   b. Enter a description.
   c. Select the Enabled checkbox, if applicable.
3. To create a new Secondary Interest Code:
   a. Click the Primary Code link.
   b. Enter the interest code.
   c. Enter a description.
   d. Select the Enabled checkbox, if applicable.
4. Click **Update** to save your work.

5.10.10 Setting Up 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.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Sales Category > Plan Element Mapping

Steps

1. To search for a plan element mapping:
   a. Enter the plan element.
   b. Select the mapping type from the drop down list.
   c. Click **Search**.
2. To create a new plan element mapping:
   a. 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.
   b. 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.
   c. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.
   d. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using % as a wildcard, and click Go.
3. Click **Update** to save your work.

5.10.11 Loading Inventory Categories

You must set up Inventory Categories to use Oracle Inventory and other ERP modules.

Use this procedure to set up and load Inventory Categories.

Note: You can load only those interest types that have both the Expected Purchase and Globally Enabled check boxes selected.

Prerequisites

Only interest types with both the Expected Purchase and Globally Enabled check boxes selected will be able to load to inventory category.

Steps

1. Navigate to **Old Setup > System Profiles**.
2. Using the Profiles form, set the OS: Inventory Category Integration profile value to `Yes`.
3. Navigate to **Concurrent Requests > Run**.
4. Using the Submit Requests form in the Concurrent Requests menu, run the concurrent program Load Interest Types and Codes to Inventory Categories. This program creates the Inventory Categories.
5. Map each inventory item to an inventory category under the Oracle Sales and Marketing Category Set.

   This must be done manually by using Oracle Inventory screens, for details please refer to *Oracle Inventory Concepts and Procedures Guide*.

   > **Note:** You can map an item to only one category in a given category set. This is a restriction from Oracle Inventory.

5.11 Setting Up Multiple Currencies

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

Your sales application calculates currency conversion for individual opportunity purchases on an estimate of the actual conversion rate that is effective on the date a sales person predicts an opportunity is going to close.

The estimated conversion rate is called a pseudo-period rate because it is based on the currency conversion rate on a single day during the period. The application uses that one conversion rate for the whole period.

If a pseudo-period conversion rate is missing, then the program looks back in time to find a conversion rate. How far back is determined by setting the value of the profile OS: Maximum Roll Days for Converting Amount. If no rate is found within this period, then your application displays asterisks and a message that no rates were found.

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

If you are a manager or administrator, on the forecast main page the currency is converted all the time. But on the opportunity worksheet and the product category worksheet, currency amounts are not displayed as converted when you view a subordinate's forecast.

Setting up multiple currencies requires:

- Section 5.11.1, "Setting Up Calendar Types" on page 5-128
- Section 5.11.2, "Setting Up the Accounting Calendar" on page 5-129
- Section 5.11.3, "Setting Up the Default Currency and Selecting the Calendar" on page 5-130
- Section 5.11.4, "Setting Up Type Mapping" on page 5-131
- Section 5.11.5, "Setting Profile Options for Multiple Currency" on page 5-131
- Section 5.11.6, "Setting Up Reporting Currency Mapping" on page 5-131
- Section 5.11.7, "Entering GL Daily Conversion Rates" on page 5-132
- Section 5.11.8, "Entering Currency Conversion Dates for Periods (Pseudo Period Rates)" on page 5-133
- Section 5.11.9, "Defining Conversion Rates for Periods" on page 5-134
- Section 5.11.10, "Run Concurrent Programs" on page 5-135
- Section 5.11.11, "Setting Up Forecast Category Mapping" on page 5-135
- Section 5.11.12, "Setting Up Budget/Revenue" on page 5-136

5.11.1 Setting Up Calendar Types

Forecast calendar types are used in forecasting.

Follow these steps to modify or create calendar types.

Forms Navigation

Administration > Administration

HTML 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.

5.11.2 Setting Up the Accounting Calendar

Forms Navigation

Administration > Administration

HTML Navigation

Administration > General > Globalization > Accounting Calendar

Steps

1. To search for an existing Accounting Calendar:
   a. Select a Calendar from the drop down list. This is a required field.
   b. Enter a Period Name.

   c. Enter a Start Date.
   d. Enter an End Date.
   e. Click **Search**.

2. To create a new accounting calendar:
   a. 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.
   b. Select a Type from the drop down list. This is a required field.
   c. Enter a Year. This is a required field.
   d. Enter a Quarter. This is a required field.
   e. Enter a Number. This is a required field.
   f. Select a From and To Date by clicking the Calendar icon. These are required fields.
   g. Enter an calendar name.
   h. 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.

5.11.3 Setting Up the Default Currency and Selecting the Calendar

Set up the default currency for your implementation.

Forms Navigation

Old Setup > System Profiles

Steps

1. Using the Profiles form, set OSO: Default Forecast Currency to the currency of your choice.
2. Click **Save** on the toolbar.
3. In OS: Forecast Calendar, select the calendar you wish to use from those you have defined in the previous step.

5.11.4 Setting Up Type Mapping

Forms Navigation

Administration > Administration

HTML Navigation

Administration > General > Globalization > Type Mapping

Steps

1. Select the same calendar you selected in the profile option "OS: Forecast Calendar".
2. To create a new Type Mapping:
   a. 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.
   b. Select the Conversion Type from the drop down list. This is a required field.
   c. Enter a description.
   d. 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).

5.11.5 Setting Profile Options for Multiple Currency

Forms Navigation

Old Setup > System Profiles

Set the following profile options for multiple currencies:

- OS: Date Mapping Type:
- OS: Default Period Type for Currency Conversion
- OS: Maximum Roll Days for Converting Amount

5.11.6 Setting Up Reporting Currency Mapping

All opportunity and forecast currency conversions are based upon the reporting currency setups.

Forms Navigation

Oracle Sales Setup > Lookup Codes > Sales

Steps

The Reporting Currency window opens.

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

5.11.7 Entering GL Daily Conversion Rates

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

Forms Navigation

Administration > Administration

HTML 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. Enter the daily conversion rates. For each daily conversion 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.

5.11.8 Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

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

Steps

1. Follow the steps for the procedure "Setting Up Conversion Types for Period Types" to enter the types of conversion rates you will use for each period type such as fiscal year, month, or quarter for the calendar you selected.
2. Set the system profile OS: Date Mapping Type for Periods by choosing whether you want to use the daily rate from the start or end date of a period for currency conversion.
3. Follow the steps for the procedure outlined in Section 5.11.9, "Defining Conversion Rates for Periods"below to search to see if the conversion rates have been entered for your periods. Enter any missing conversion rates.

5.11.9 Defining Conversion Rates for Periods

Forms Navigation

Administration > Administration

HTML 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.

5.11.10 Run Concurrent Programs

Forms Navigation

Concurrent Requests > Run

Run the following concurrent programs. For detailed instructions on running concurrent programs, please refer to the *Oracle Applications System Administrator's Guide*.

- Refresh AS_PERIOD_DAYS table
- Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)

If you are using opportunity bins and forecast materialized views, run the following concurrent program to refresh materialized views:

- Refresh of Opportunity Bins Data
- Refresh of Forecast Summary Tables

5.11.11 Setting Up 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.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Forecast > Forecast Sales Category Mapping

Steps

The Forecast Sales Categories page opens.

1. To search for a Forecast Sales Category:
   a. Select a Forecast Category Name from the drop down list.
   b. Click **Search**.
2. To create a new Sales Category Value:

a. In the first blank Interest Type field, select an interest type from the drop down list. This is a required field.

b. Select a Start Date by clicking the Calendar icon. This is a required field.

c. Select an End Date by clicking the Calendar icon. This is a required field.

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

Note: You can forecast only when the forecast dates fall within the forecast category dates.

5.11.12 Setting Up Budget/Revenue

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.

Prerequisites

None

Forms Navigation

Administration > **Administration**

HTML Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. To search for an existing budget and revenue entry:

    a. Select the Sales Group from the drop down list. This is a required field.

    b. Select a Period Type from the drop down list. This is a required field.

    c. Select a Period Name from the drop down list. This is a required field.

    d. Click **Apply**.

    e. The subordinate sales group and salesperson search results are displayed.

2. To enter new budget and revenue amounts:

    a. Select the Sales Group from the drop down list. This is a required field.

    b. Select a Period Type from the drop down list. This is a required field.

c. Select a Period Name from the drop down list. This is a required field.

d. Click **Apply**.

e. The subordinate sales group and salesperson search results are displayed.

f. Enter the budget amount.

g. Enter actual revenue amount.

a. Select a currency from the drop down list. This is a required field if amount is entered.

b. Click **Update** to save your work.

c. Click the **Sales Group Name** link to view details and enter data for the next level of subordinates.

3. To upload data from a file:

   a. Click the "**Click here to Upload a file to a database**" link.

   b. 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"

   c. 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.

5.12 Setting Up Quoting

Applies to: Sales Online, TeleSales

Sales applications rely on Oracle Quoting, formerly named Oracle Order Capture, for quote and order management. Oracle Sales Online uses the HTML-based interface for Oracle Quoting. Oracle TeleSales uses the Forms-based interface.

The two versions of the Oracle Quoting product have two different implementation guides.

For Oracle TeleSales, follow the instructions in *Oracle Quoting* **-** *Forms Implementation Guide*.

For Oracle Sales Online, follow the instructions in *Oracle HTML Quoting Implementation Guide* and those outlined below.

Oracle Sales-Specific Setups

Sales representatives using quoting functionality can have a variety of permissions, such as the ability to submit a quote as an order or to create new customers. Permissions are determined by your system administrator or sales manager.

Your two main possible work flows are campaign-to-order and quote-to-order:

Campaign to order: You begin in Sales Online to fulfill the campaign to opportunity work flow. To create a quote as part of a sales campaign or to conclude a campaign, click the Quote tab in Sales Online. You then create a quote within Sales Online, and submit the quote as an order if you have the permission to do so.

Quote to order: You create quotes for customers. You can also submit the quote as an order if you have the permission to do so.

Steps

The following step details are located in the *Oracle HTML Quoting Implementation Guide*. It is necessary that you perform the following steps, as outlined in the *Oracle HTML Quoting Implementation Guide*, in order for Sales Online's quoting functionality to work properly.

- Assign a Sales Representative Role
- Import a CRM Resource
- Set Profile Options

Quote Profiles

In order to view the Create Quote button in Sales Online, you must set the following profiles:

- **OSO: Enable Quotes**
- **IBE: Use Pricelist Associated with Specialty Store:** must be set to Yes
- **MO: Operating Unit**

To use Quoting in TeleSales, see the Importing a CRM Resource section of the *Oracle HTML Quoting Implementation Guide* and follow the steps.

5.13 Setting Up Flexfields

Applies to: Sales Online

Refer to the *Oracle Applications Flexfield Guide* for detailed information about setting up descriptive flexfields.

Sales Online uses two types of flexfields, descriptive and context-sensitive. The following table lists the flexfields and the details about each flexfield. Please note, it is very important to freeze and compile the flexfields using the Forms application after installation is complete. The procedures for freezing and compiling flexfields is located in the *Oracle Applications Flexfield Guide*.

Flexfield Name	Title	Page Used In	Context Sensitive
Remit Address HZ	Address	Address Create / Detail (location information such as country, address1, state, city, etc.) Used for Global Address Formatting.	Yes
HZ_PARTIES	Party Information	Organization / Person, Create / Detail	Yes
HZ_PARTY_RELATIONSHIPS	Party Relationship Information	Relationship Create / Detail	Yes
HZ_ORG_CONTACTS	Organization Contact Information	Relationship Create / Detail	Yes
HZ_PARTY_SITES	Party Site Information	Address Create / Detail ("Attributes" section)	Yes
AS_INTERESTS	Interests	Opportunity, Classifications	No

Flexfield Name	Title	Page Used In	Context Sensitive
AS_ACCESSES	Accesses	Opportunity/Organization/Person Sales Team	No
AS_LEADS	Opportunities	Opportunity Create/Detail	Yes
AS_SALES_LEADS	Sales Leads		
AS_SALES_CREDITS	Sales Credits	Opportunity Sales Credits	No
AS_LEAD_COMPETITORS	Opportunity Competitors	Opportunity Competitors	No
AS_LEAD_CONTACTS	Opportunity Contacts	Opportunity Contacts	No
AS_LEAD_LINES	Opportunity Lines	Opportunity Purchase Items	No
AS_SALES_LEAD_LINES	Sales Leads Lines	Leads	No
AS_SALES_LEAD_CONTACTS	Sales Leads Contacts	Leads	No
AS_SALES_LEADS	Sales Leads	Leads	Yes

5.14 Setting Up the Home Page

Applies to: Sales Online

The home page is designed to provide "snapshots" of information about Sales Online data presented in the form of bins and charts. Bins are reports summarized into editable tables with links to further details about the data. Charts are graphical representations of data. Additionally, the home page provides access to Tools, News, Marketing, and Encyclopedia.

Prerequisites

None

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Home Page Bins

Steps

Before you can personalize your home page, you must run the following concurrent programs. For information about running concurrent programs, see the *Running Concurrent Programs* section of this guide.

The following table lists and describes the concurrent programs needed to set up your home page.

Mandatory	Concurrent Program Name	Description	Notes
Yes	Initial Build of Opportunity and Leads Bins	This program is used for the Opportunity and New Leads home page bins. This program must be run initially before users can set up Opportunity and New Leads bins. This program loads the materialized view with sales credit information. No parameters are needed.	This program must be run every time the as_sales_credit_denorm is rebuilt or when values such as sales stages or statuses have been changed.
Yes	Initial Load for Leads Reports	This program must be run initially before users can set up Leads Reports. This program loads the materialized view for sales credit information. No parameters are needed.	This program must be run every time that the as_sales_credit_denorm is rebuilt or when values such as sales stages or sales statuses are changed. If this job fails, try the following procedure: ■ Run "Drop temp tables for Home Page MVs" to cleanup TEMP tables ■ Re-run Initial Load for Opportunities Reports

Mandatory	Concurrent Program Name	Description	Notes
Yes	Initial Load for Opportunities Reports	This program must be run initially before users can set up Opportunity Reports. This program loads the materialized view with sales credit information. No parameters are needed.	This program must be run every time that the as_sales_credit_denorm is rebuilt or when values such as sales stages or sales statuses are changed. If this job fails, try the following procedure: ■ Run "Drop temp tables for Home Page MVs" to cleanup TEMP tables ■ Re-run Initial Load for Opportunities Reports
No	Refresh of Lead Bins Data	This program should be scheduled to run periodically to refresh the materialized view for the Leads bin.	Users will not see leads in the bins that were created after the last refresh of the materialized view.
No	Refresh of Opportunity Bins Data	This program should be scheduled to run periodically to refresh the materialized view for the Opportunity bins.	Users will not see opportunities in the bins that were created after the last refresh of the materialized view.

If there are any missing indexes for the materialized views, run the "Index Creating for Missing Indexes for MVs". This concurrent program automatically detects which indexes are missing and recreate them. Additionally, this concurrent program re-analyzes all tables.

5.14.1 Setting Up Home Page Bin Accessibility

Prerequisites

None

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Home Page Bins

The home page displays selected bins, or snapshots, of information within Sales Online. You can manage which responsibility has access to which bins through the Home Page Bins link from the Administration tab.

Steps

1. The Home Page Bins Administration page opens.
2. Select the Application from the drop down list. Please note, 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**.

5.14.2 Setting Up 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.

Prerequisites

None

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Home Page Message

Steps

1. Enter a new message in the text box.

   You can use HTML tags to customize the message.
2. Click **Update**.

5.14.3 Using External Tools

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.

5.14.4 Setting up Links to External Sites

Prerequisites

None

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > 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**.

5.14.5 Setting up Links to ERP Applications

Prerequisites

None

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > 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.

5.14.6 Setting Up News

Applies to: Sales Online

See the *Oracle Marketing Encyclopedia Concepts and Procedures Guide,* "Integrating with OneSource" under the "Implementing Oracle Marketing Encyclopedia" section for detailed information.

5.14.7 Setting Up Charts

Applies to: Sales Online

Setting up charts on your home page requires the following steps.

HTML Navigation

Profiles > Home Page

Steps

1. To enable run-time image generation for Charts functionality on Unix, you must specify the X Server that will be used to generate dynamic images. This server does not have to be a dedicated server for Applications; however, it does need to be accessible by the Apache server that will call it. This can be done through "xhost +", or through a more secure "xauth" Unix command. You can also reference a Windows NT Machine that is running a Unix emulator like Exceed. See the main pages for "xhost" and "xauth" for more information.

   Note: This step is not required if you are installing the JTF framework on a Windows-based operating system (Windows NT or Windows 2000). To implement the Display Server identifier update `<ORAHTTP_TOP>/Jserv/etc/jserv.properties` with the following changes:

2. Add the following DISPLAY parameter immediately below the wrapper.bin variable.

   a. wrapper.env=DISPLAY=<xserver-hostname>:<xserver-displayport>

3. Replace <xserver-hostname> and <xserver-displayport> with the machine name and port number where the X Server is running.

   For example, wrapper.env=DISPLAY=myxserver.mycorp.com:0

   Note: This step would be done only if you start the Apache Jserv in the Automatic mode. If you are starting the Jserv in Manual mode then you need to set the DISPLAY environment variable, either in the script that starts the jserv or on the shell that will (re)start the apache.

   setenv DISPLAY <xserver-hostname>:<xserver-displayport>

4. Mount the oa_servlets in the servlet zone. In order for charts to work, Jserv must be able to run servlets. Configuring servlets involves creating servlet mount point, adding java.properties file, modifying jserv.properties file.

   Please refer to the *Installing Oracle Applications, Release 11i* for detailed instructions.

5.15 Setting Up Menu Administration

Applies to: Sales Online

The Menu Administration page is used to organize the side panel navigation menus for Sales Online. By re-sequencing menus, creating parent/child menus, and re-naming menus, you can organize the side panel navigation to your preference.

Prerequisites

None

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Menu Administration

Steps

1. The Side Navigation page opens.
2. To re-sequence side panel navigation menus:
   a. Select a Menu Name from the drop down list.
   b. Click **Go**.
   c. Enter the appropriate sequence number in the Sequence field.
   d. Click **Update**.
3. To change the menu name:
   a. Select a Menu Name from the drop down list.
   b. Click **Go**.
   c. Enter the new menu name in the Attribute Text field.

      For seeded menus, it is recommended that you do not change the Function Name.
   d. Click **Update**.
4. To create a parent menu:

a. Select a Menu Name for which you want to create a parent menu for from the drop down list.

b. Click **Go**.

c. 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.

d. Click **Update**.

5. To create your own menu:

   a. 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.

   b. Enter an attribute in the Attribute Field.

   c. 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.

   d. If you want this menu to be a child menu, select the parent menu from the Parent Attribute drop down list.

   e. Click **Update**.

6. Save your changes.

5.16 Setting Up CRM Foundation Modules

Applies to: Sales Online, TeleSales, Field Sales/Laptop

CRM Foundation provides modules of common functionality used throughout the application suite. Some modules enable user functionality such as notes, calendar, interaction tracking, and task management. Other foundation modules enable the delivery of email documents (Fulfillment) or the distribution of leads and opportunities throughout the organization (Territory Management).

The following modules are optional:

- Notes
- Interactions

- Tasks
- Calendar
- Fulfillment
- Territory Manager

See the *Oracle CRM Applications Foundation Implementation Guide* for the steps required to implement the required modules.

5.16.1 Setting Up Notes

Forms Navigation

CRM Foundation > Notes Setup

Users can create notes about the different objects in sales applications.You may choose to use the predefined set of note types and create additional note types of your own.

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

5.16.2 Setting Up Interaction Tracking

Forms Navigation

CRM Foundation > Interaction History Administration

All eBusiness Suite applications, including sales applications, can record the interactions agents have with customers and prospects and track the outcome of those interactions. Currently Sales Online users cannot create interactions, interactions are read-only items.

Refer to the Implementing Interaction History section of the *Oracle CRM Applications Foundation Implementation Guide.*

5.16.3 Setting Up Tasks

Forms Navigation

CRM Foundation > Task Manager

Refer to the Implementing Task Manager section of the *Oracle CRM Applications Foundation Implementation Guide*.

5.16.4 Setting Up the Calendar

Forms Navigation

CRM Foundation > Calendar Setup

Refer to the Implementing Calendar section of the *Oracle CRM Applications Foundation Implementation Guide*.

5.16.5 Setting Up CRM Foundation Fulfillment

You must implement fulfillment if you plan to deliver collateral either via email or fax to customers and prospects. Refer to the Fulfillment section of the *Oracle CRM Applications Foundation Implementation Guide* for information about setting up fax and email servers as well as the electronic collateral itself.

5.16.6 Setting Up Territories

Navigation

CRM Foundation > Territory Manager > Territory Administration

Territory Manager provides user interfaces and functionality that organizations can use to manage sales territories.

If you choose not to set up Territory Manager, then agents must manually assign leads, customers and opportunities.

Use Territory Manager to automatically assign sales teams based on their availability and expertise. Also use it to make sales information more secure by restricting personnel access to customer data.

Most sales territories are one-dimensional. They can assign tasks to employees based on geography or company size. Territory Manager makes it possible for you to create multidimensional territories using any number of such criteria. These criteria include:

- Postal code
- Area code
- Country

- Vertical market
- Company size
- Product expertise

For example, you can assign all large customers within a specific geographical area only to those sales representatives who have an expert knowledge of a product and have been with the company for more than one year.

You can create multiple such territories for individuals or for teams of sales representatives. Think of Territory Manager as a high-level programming tool that determines the assignment of tasks and resources within your company.

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

Guidelines for Sales Applications

- You must create your territories under the Oracle Sales and TeleSales folder in the Navigator.
- You must choose one or more of the three available transaction types on the Overview tab:
  - Account
  - Lead
  - Opportunity

  The account transaction type gives you maximum flexibility. If you select account, then you can:
  - Use any of the available account, lead, and opportunity qualifiers to set up your territories.
  - Assign the different resources in the territory to access account, lead, and opportunity information. You can assign a single resource to one or more of these Access Types on the Resources tab. Different resources can be set up to gain access to different types of information.

    For example, a resource with Access Type account and lead can access the customer and all the leads for that customer.

  Selecting lead or opportunity transaction types on the Overview tab of the Territory Details window, restricts:

– What qualifiers you can select on the Qualifier tab to assign your territories.

– What type of access you can assign to different resources on the Resources tab.

For example, if you select only the lead transaction type on the Overview tab, then:

– You can only use account and lead qualifiers to set up the territory.

– You can only assign resources to access leads, not customer or opportunity information.

If you select only the opportunity transaction type on the Overview tab, then:

– You can only use account and opportunity qualifiers to set up the territory.

– You can only assign resources to access opportunities, not customer or opportunity information.

Note: If you do not assign an access type to a resource, then the application grants access based on the transaction type(s) you have selected for the territory. For example, if the transaction type for the territory is Account and a resource is not assigned and access type, then that individual can only access account (customer) information.

Available Transaction Qualifiers

Oracle sales applications support the following transaction qualifiers for creating territories:

Opportunity Qualifiers

The following opportunity qualifiers are available for sales applications:

- Opportunity Channel
- Opportunity Classification
- Opportunity Expected Purchase
- Opportunity Promotion Identifier
- Opportunity Status
- Opportunity Inventory Item

- Total Amount

Lead Qualifiers

The following lead qualifiers are available:

- Budget Amount
- Lead Expected Purchase
- Lead Inventory Item
- Lead Promotion Identifier
- Purchase Amount

Account Qualifiers

The following account qualifiers are available:

- Account Classification
- Account Code
- Account Hierarchy
- Area Code
- City
- Company Annual Revenue
- Country
- County
- Customer Category
- Customer Name Range
- Customer Name Range Group
- Number of Employees
- Postal Code
- Province
- Sales Partner of
- SIC Code
- State

5.16.7 Setting Up Real-Time Territory Assignment

Your sales application can assign or reassign a lead or opportunity whenever an agent modifies key information. For example, if an agent enters a postal code in a lead and your territories are set up along geographical lines, then the application can automatically assign or reassign the lead to the person who is responsible for leads within that postal code.

Forms Navigation

Old Setup > System Profiles

To enable real-time territory assignment you must set up the following profiles:

- **OS: Enable Real Time Opportunity and Customer Assignment**

  Level at which it can be set: Site

  Default setting: No.

  This profile is not visible or updatable by the user.

  It is visible to and updatable by the application.

  If set to Yes, this profile turns on real-time opportunity and customer assignment. This means that the territory program runs each time agents update fields used for territory assignment or create new records.

  If set to No, you must run the Assign Territory Accesses concurrent program to assign opportunities and customers to territories.

- **HZ: Execute API Callouts**

  Levels at which it can be set: User / Responsibility / Application / Site

  Is it visible to the user? Y

  Is it updatable by the user? Y

  Is it visible to the program? Y

  Is it updatable by the program? Y

  Default setting: NO

  If you set this profile to Yes, then changes agents make to organization records trigger automatic territory assignment

  This must be set to Yes for New Mode TAP to work.

5.16.8 Setting Up Batch Territory Assignment Processing

Oracle TeleSales administrators can assign territories in batch mode by running the Assign Territory Access concurrent program. Depending on need, this concurrent program automatically launches a second concurrent program which processes the individual territory assignments. This second concurrent program is called Generate Territory Access.

By default, only one Generate Territory Access is spawned by each run of the Assign Territory Access program. The implementer can speed up the process of territory assignment, however, by running multiple Generate Territory Access programs in parallel. This can be done by setting the profile OS: Territory Number of Child Processes to a number greater than 1. For example, setting this profile to 10 causes the Assign Territory Access program to run 10 instances of Generate Territory Access in parallel. How many processes you can run in parallel depends on your hardware configuration and load.

Forms Navigation

Old Setup > System Profiles

Set up the following profiles to enable batch territory assignment processing by running the Assign Territory Access concurrent program:

- **OS: Territory Minimum Number of Records for Parallel Processing**

  Level at which it can be set: Site

  Is it visible to the user? Y

  Is it updatable by the user? N

  Is it visible to the program? Y

  Is it updatable by the program? Y

  Default setting: 100

  If the number records to process are less than the setting of this profile, then no parallel processes are started regardless of the value of profile option OS: Territory Number of Child Processes.

- **OS: Territory Number of Child Processes**

  Level at which it can be set: Site

  Is it visible to the user? Y

  Is it updatable by the user? N

Is it visible to the program? Y

Is it updatable by the program? Y

Default setting: 1

This profile sets the number of parallel processes launched by the territory assignment program. The values must be set based on available processes and load on the system as discussed at the beginning of this step.

- **OS: Territory Records to Open For Processing Changed Accounts**

  Level at which it can be set: Site

  Is it visible to the user? Y

  Is it updatable by the user? N

  Is it visible to the program? Y

  Is it updatable by the program? Y

  Default setting: 10000

  This profile sets the limit for the bulk fetch operation in territory assignment program. The number of records you enter here will be processed at one time. The higher the number, the better the performance.

  The maximum number of records must meet the following two conditions:

  - Must be less than one million.
  - Must be less than the maximum set by the following formula:

    Maximum setting < (Number of records in HZ_PARTY_SITES + Number of records in HZ_PARTY without sites) / Number of child processes

5.16.9 Running Concurrent Programs for Territory Assignment

Forms Navigation

Concurrent Requests > Run

After you have completed the territory setups you must run the following concurrent programs in the order they are listed here:

1. Generate Territory Package: This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least

once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.

2. Assign Territory Access: This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting two profile options:
   - OS: Territory Minimum Number of Records for Parallel Processing
   - OS: Territory Number of Child Processes

5.17 Creating Custom JSP Pages

Use the following procedure to create custom JSP pages for Oracle Sales Online.

Applies to: Sales Online

Responsibility

Application Developer and Application Developer Common Modules

Steps

1. Search for the function name of the JSP page for which you want to add a custom JSP.

   Responsibility: Application Developer

   Navigation: Application > Function > Web HTML tab

2. Create an AK attribute.

   Responsibility: Application Developer Common Modules

   Navigation: Define Attributes

   a. Confirm that the attribute ID is the function name of the JSP page with the suffix "_C_J_I". The attribute ID may be the attribute name.

   b. Select the application name, Oracle Field Sales.

   c. Select the data type VARCHAR2.

   d. Set the value length to any number. This field is not used.

   e. In the label column, type in the name of the custom JSP page that you want to create. The JSP page must be in teh OA_HTML directory.

3. Repeat Step 2 for all custom JSP pages that you want to create.

4. Create an AK region.

   Responsibility: Application Developer Common Modules

   Navigation: Define Regions

   a. Confirm that the region ID is ASF_CUSTOM_JSP_INCLUDES.
   b. Select the application name, Oracle Field Sales.
   c. Select the object name, ICX_PROMPTS.
   d. Set the region style to any style. This field is not used.
   e. Add the attributes that you defined as region items for this region. Click the Region Item button on the form.

5. Bounce the Apache server.

When you log into the application, you will see the custom JSP page included at the bottom of the page.

5.18 Setting Up Partners Online

Applies to: Sales Online, TeleSales

The Partner subtab provides for the creation and management of information relating to Partner organizations.

Partners may be of the following types:

- **General Partners** are any parties in the CRM modules that have a "Partner Of" relationship with another organization or person. General Partners include Sales and Exchange Partners.
- **Sales Partners** have a specific partner agreement that allows the Vendor to pass a sales deal to that Partner through Oracle Partners Online.
- **Exchange Partners** may participate in the opportunity exchange system between multiple Vendors and a Partner.

Refer to the *Oracle Partner Relationship Management Implementation Guide* for information about setting up Partners.

5.19 Setting Up Marketing Source Codes

Applies to: Sales Online, TeleSales, Field Sales

Sales applications use marketing source codes to track which marketing activity is responsible for a sales or a sales activity.

Source codes are created by different marketing activities created in Oracle Marketing Online. This includes campaigns, campaign schedules, events, event schedules, and offers. The source codes are created either automatically whenever marketers create one of these activities or entered by the marketer manually.

Campaigns and campaign schedules are the most important of these marketing activities in Oracle Marketing Online. Campaigns are constructed using a wide variety of marketing objects. The basic components of campaigns are its theme, the funding (budgets), the execution (schedules), the target audience (lists and marketing mediums), the cost (costs) and response measuring devices (metrics).

Because all campaigns are not created alike, custom setups are available to easily configure campaigns for different activities and marketing channels.

Campaigns often create a hierarchical structure. Campaigns may be divided by geography or by product or by marketing channel. Campaigns are developed using a patent child relationship. A parent campaign may have many child campaigns. A child campaigns may in turn, be a parent campaign as well.

The execution of a campaign may be further broken down by schedule. A schedule determines when, where and how a campaign activity is executed. A particular campaign may have multiple schedules for many different marketing channels and for execution of a campaign over a period of time.

Refer to *Oracle Marketing Online Implementation Guide* and *Oracle Marketing Online Concepts and Procedures* for information on how to set up marketing source codes.

You must also set up the following system profiles:

- OS: Source Code Mandatory for Leads
- OS: Source Code Required for Opportunity

5.20 Setting Up Marketing Encyclopedia System

Applies to: TeleSales, Sales Online

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia System Concepts and Procedures* guide.

5.21 Setting Up Incentive Compensation

Applies to: Sales Online, TeleSales

Oracle Incentive Compensation is an application within the Oracle E-Business Suite. The application can be deployed as a stand alone module or in combination with other Oracle applications to meet your solution requirements.

With Oracle Incentive Compensation, new incentive programs are configured with ease, approved online, and deployed worldwide. As sales transactions are received, the appropriate credits are accurately distributed and calculated according to the structure of the organization and the specific agreements that are in place. The sales organization receives up to the minute feedback on performance and earnings through self-service reports.

The architecture allows the application to be deployed for any size organization without the inherent limitations of spreadsheets, custom applications, or client server applications. Oracle Incentive Compensation is unmatched in its ability to support the global enterprise. Multiple currencies and languages are supported in a single database instance.

Refer to the *Oracle Incentive Compensation Implementation Guide* for information about setting up Incentive Compensation.

5.22 Setting Up the Opportunity Exchange

Applies to: Sales Online

The Opportunity Exchange allows two partners to work simultaneously on the same opportunity in order to stimulate collaborative selling.

Setting up the opportunity exchange requires two different setups.

Steps

1. Set up the LETS (Opportunity Exchange Transaction Server) and the Vendor/Partner

    a. Log in to the LETS server.

    b. Choose the **Create Partner** tab.

    c. Enter the company name.

    d. Enter the company code (this can be the company stock ticker or the company short name).

    e. Submit changes.

    f. The confirm partner information appears.

    Note: You will need the partner ID that is generated in order to exchange opportunities.

    This includes the steps to setup a partner on the LETS to enable sharing of opportunities. Only when the partner is set up on the server can the exchange of information take place.

    This includes the setup needed to actually carry out the exchange of information between partners.

5.22.1 Setting Up System Profiles for Opportunity Exchange

Forms Navigation

Old Setup > System Profiles

You must set up the following system profiles:

- **OSO: Enable Lead Share:** The profile option to enable opportunity sharing throughout the system
- **OSO: Lead Share Application ID:** Application ID
- **OSO: Lead Share Company Code:** The company code which you registered on the LETS server
- **OSO: Lead Share Responsibility ID:** The default responsibility of the sales person who is assigned the opportunities
- **OSO: Lead Share Host Name:** The host name of the LETS server
- **OSO: Lead Share Port Number:** The port number of the LETS server

- **OSO: Lead Share Proxy Host:** The proxy host name of the LETS server
- **OSO: Lead Share Proxy Port:** The port number of the proxy host name of the LETS server
- **OSO: Lead Share Partner ID:** Partner ID generated from the LETS server
- **OSO: Lead Share Mail From**: In case of error, in the data send and fetch between partners, an email is sent from this user.
- **OSO: Lead Share Mail To**: In case of error in the data send and fetch between partners, an email is sent to this user.
- **OSO: Lead Share Mail CC**: In case of error in the data send and fetch between partners, an email is carbon copied to this user.
- **OSO: Lead Share Send Flag**: Y/N send email when an API error occurs during send or fetch data between partners. Default is N.

5.23 Setting Up Quick Menu

Applies to: TeleSales

Forms Navigation

Old Setup > System Profiles

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

5.24 Hiding and Setting Default Tabs in Oracle TeleSales Windows

Applies to: TeleSales

You can determine which tabs a user can view in the eBusiness Center, the Lead Center and the Opportunity Center windows and the order in which they are presented.

You can hide and expose tabs through menu and function exclusions when you set up responsibilities. If you exclude a tab, then that tab is hidden from view.

See the Managing Oracle Applications Security chapter of the *Oracle Applications System Administrator’s Guide.*

eBusiness Center

The tabs available for eBusiness Center are:

- eBC Overview Tab
- eBC Organization Tab
- eBC Person Tab
- eBC Relationships Tab
- eBC Address Tab
- eBC Accounts Tab
- eBC Opportunity Tab
- eBC Leads Tab
- eBC Quote/Order Tab
- eBC Collateral Tab
- eBC Events Tab
- eBC Tasks Tab
- eBC Notes Tab
- eBC Dashboard Tab
- eBC Service Request Tab
- eBC Custom Tab 1
- eBC Custom Tab 2
- eBC Collection Profile Tab

Profile: OTS: Default Tab in eBusiness Center

Opportunity Center

The tabs available for the Opportunity Center are:

- Opportunity Center Notes Tab
- Opportunity Center Purchase Tab
- Opportunity Center Classification Tab
- Opportunity Center Sales Team Tab

- Opportunity Center Obstacle Tab
- Opportunity Center Task Tab
- Opportunity Center Lead Tab
- Opportunity Center Quote / Order Tab
- Opportunity Center Partner Tab
- Opportunity Center Contact Tab
- Opportunity Center Closing Tab

Profile: OTS: Default Tab in Opportunity Center

Lead Center

Tabs available for Lead Center:

- Lead Center Purchase Interest Tab
- Lead Center Contact Tab
- Lead Center Sales Team Tab
- Lead Center Task Tab
- Lead Center Note Tab
- Lead Center Opportunity Tab

Profile: OTS: Default Tab in Sales Lead Center

Universal Search

Profiles:

- OTS: Default Universal Search Type
- OTS: Default Universal Search Tab

5.25 Setting Up Custom Tabs

Applies to: TeleSales

Implementers can create two custom tabs in the eBusiness Center window by modifying the code for the eBusiness Center form and the associated library.

The customization must be made on a view or table which has a reference or intersection with HZ_PARTIES. The fields that can be displayed in the custom tabs will be based on this view or table.

The implementer must write public APIs to perform transactions against this table. Code for insert, Update and Delete has to be built into these APIs after the necessary validations.

Prerequisites

Knowledge of Forms development procedure and understanding of Oracle TeleSales code.

Steps

1. Customize the form:
   - Create a Data block with all the fields that are needed for displaying in the custom tab. This must done in the form ASTCUTM1.fmb
   - On Insert trigger must be coded for the data block to insert data into the tables.
   - On Update trigger must be coded for the data block to update data into the tables.
   - On Delete trigger must be coded for the data block to delete data from the tables.
   - The fields in the data block must be placed on the canvas "ASTRCALL_STACKED_CUSTOM1".
   - Any record groups and LOVs must be coded.
   - In order to integrate this with the e Business Center, The data block, Record groups and LOVs must be dropped in the "CUSTOM1_OBJ_GRP" object group.
   - The form-level trigger called as CUSTOM1_HANDLER has been coded to handle the different events from the eBusiness Centre.
2. Modify the library:
   a. Code a new package in the library ASTCUTM1.pld. Calls for this package can be included in the package CUSTOM1_PKG.

      The API for inserting, updating, and deleting can be included in this package.

3. Set up the label for the custom tabs:

   a. For custom tab 1, change the meaning of the lookup code ASTRCALL_ASTCUTM1 of the lookup type ABC Tab Labels. This changes the label.

   b. For custom tab 2, change the meaning of the lookup code ASTRCALL_ASTCUTM2 of the lookup type ABC Tab Labels. This changes the label.

The form you create can be compiled and run stand-alone. There are no dependencies for running this form.

5.26 Setting Up Forms Integration with HTML-based Applications

Applies to: TeleSales

To be able to launch JSP pages from HTML-based Oracle eBusiness Suite applications, including Oracle Sales Online, you must set up the following system profile options:

- Application Servlet Agent

  Set this profile to the URL of the Apache server. For example: `http://ap084sun.us.oracle.com:7777/OA_HTML`

  Please refer to the *Oracle Applications Implementation* guide for more information.

- OSO: Application Utility Class

  Set this profile to: `oracle.apps.asf.Util.OsoAppUtility`

- FUCNTION_SECURITY_REGION

  Set this profile to: `ASF_FUNC_SEC_REG`

5.27 Setting Up Mapping Capability for Addresses in eBusiness Center

Applies to: TeleSales

You can make it possible for agents using the eBusiness Center to obtain maps of addresses in the Address tab. Agents can double click on the Postal Code field and be launched to the mapping service of your choice.

To set up the link between the application and the mapping service, you must set up the profile option: OTS: URL to Display a Map Of The Address.

For example, you can link to Yahoo Maps by entering the following URL:

```
http://maps.yahoo.com/py/maps.py?BFCat=&Pyt=Tmap&amp;newFL=Use+Address+Below&amp
;addr=ADDRESS1&csz=@CITY+@STATE+@POSTAL_CODE&Country=@COUNTRY&Get%AOMap=Get+Map
```

You pass parameters to the mapping service via the following URL variables. All of them start with the @ sign:

- @COUNTRY
- @COUNTY
- @POSTAL_CODE
- @PROVINCE
- @STATE
- @CITY
- @ADDRESS4
- @ADDRESS3
- @ADDRESS2
- @ADDRESS1

When this profile is set, agents viewing an address in the Address tab of the eBusiness Center, see a green Postal Code. This is the link they can use to launch the mapping service.

5.28 Setting Up Universal Work Queue

Applies to: TeleSales

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

By default, when an agent double-clicks on a task in the Universal Work Queue, the task opens in the Task Manager window. If you instead wish to display the task in the Task tab of the eBusiness Center, then you must run the following script:

```
SET DEFINE OFF
UPDATE JTF_OBJECTS_B
```

```
SET OBJECT_FUNCTION = 'AST_RC_ALL',
ENTER_FROM_TASK = 'N',
OBJECT_PARAMETERS = 'PARTY_ID=&ID'
WHERE OBJECT_CODE = 'PARTY'
AND APPLICATION_ID = 690; r
```

Note: Oracle recommends that you run this script first on your test environment.

5.29 Setting Up Marketing Events

Applies to: TeleSales

Use this procedure to set up events.

Prerequisites

- You must be set up as a user for Oracle Marketing Online.
- You must have the URL for Oracle Marketing Online.

Steps

1. Create the event according to *Oracle Marketing Online Concepts and Procedures.* Make sure of the following:
   - The event you create is active and you specify the event start date and end date.
   - You must enter a valid registration start date and end date. The registration start date cannot be earlier than today's date.
   - In the Registration window, you must specify the maximum number of registrants and if you wish to enable the wait listing of enrollees. With wait-listing turned on, a causation for the event automatically enrolls the first person on the wait list queue. You can navigate to the Registration window after you create the event, by selecting the Registration side panel menu item.

   Note: If you do not enter a number for the maximum number of registrants, the application defaults a 0 and the event will not show up in Oracle TeleSales.

2. Log on into Oracle applications again as a System Administrator.
3. Navigate to **Profile > System**.
4. Set the following two profile options to *Yes*:
   - AMS: Should Call To Inventory Modules To Be Made
   - AMS: Should Call To Pricing Modules To Be Made
5. Set the following profiles:
   - OTS: Default Event Reply to Email Address. Enter the email address you want event enrollees to use for replying to enrollment confirmation e-mails.
   - OTS: Default Event Subject Line. Enter the subject line for the enrollment confirmation email.

5.30 Setting Up Marketing Collateral

Applies to: TeleSales

Use this procedure to set up collateral for Oracle TeleSales this includes collateral sent with events. You can set up either physical collateral such as brochures, books, CDs, or electronic collateral which consist of e-mails and other files you create. Physical collateral is managed via Oracle Inventory. Electronic collateral is managed by the Fulfillment CRM foundation module. Much of the initial collateral setup is done in Oracle Marketing Online according to the procedures you can find either in the *Oracle Marketing Online Concepts and Procedure*s and Oracle Marketing Online or in the online help system. Please note that Oracle Marketing Online uses the term deliverable instead of collateral. This means that you must follow the procedures for creating deliverables.

Prerequisites

- You must complete Marketing Campaign implementation before setting up collateral.
- You must complete an Oracle Inventory implementation before setting up physical collateral.
- You must be set up as a user for Oracle Marketing Online.
- You must have the URL for Oracle Marketing Online.

Steps

1. If you wish to enable a user to send physical collateral, you must enter a sales person number for that individual using Resource Manager. Here are the steps:

   a. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Resources**.

   b. Use the Find Resources window to find the user.

   c. In the Resource Search Results window, click **Resource Details**.

   d. In the Resource window, enter any number in the Salesperson Number field. The system tells you if you are entering a duplicate.

2. Navigate to **Old Setup > System Profiles**.

3. Set up the following system profile options:

   - OTS: Default Shipping Method for Electronic Collateral. This profile sends the default fulfilment method for electronic collateral.
   - OTS: Default Shipping Method for Physical Collateral. This sets the default shipping method which can be changed by the agent sending collateral.
   - OTS: Default Cover Letter for Collateral Requests. This profile assigns a default cover letter for sending electronic collateral.

4. If you are creating physical collateral then:

   a. Set the profile AMS: Item Validation Master Organization to your inventory organization.

   b. Log into Oracle Marketing Online's HTML interface.

   c. Create the deliverable in the Create Deliverable window of Oracle Marketing Online selecting the Physical radio button.

   d. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters DELV.

   e. Navigate to **Inventory > Items >Master Items**.

   f. Select the inventory organization for your collateral. You must select the inventory organization set up as the default organization in an Oracle Marketing Online. Please refer to *Oracle Marketing Online Implementation Guide* for more information about the default setting and the system profile where it is set.

g. Use the Item List of Values (LOV) to enter the Item. As the LOV lists all of the items in your inventory, you may wish to limit your search to `DELIV%`.

h. If the collateral is going to be shipped from multiple warehouses, then from the Tools menu choose Organization Assignment and assign the appropriate warehouses. See *Oracle Inventory User's Guide* for more information.

i. On the Main tab, use the Lists of Values (LOVs) to enter `Each` as the unit of measure. `Finished good` as the User Item Type and `Active` as the status. The Both radio button is selected by default.

j. On the Inventory tab, select the Inventory Item, Stockable, and Transactable check boxes.

k. On the Costing tab, select the Costing Enabled, Inventory Asset Value, and Include in Rollup check boxes.

l. On the Purchasing tab, select the Purchased and Purchasable check boxes.

m. On the Order Management tab, select the Customer Ordered, Customer Orders Enabled, and Shippable radio buttons and enter the Default Shipping Organization.

n. On the Invoicing tab, select the Invoicable Item and Invoice Enabled check boxes.

o. Click **Save** on the toolbar.

p. Navigate to **Inventory >Transactions > Miscellaneous Transactions.**

q. Use the Type LOV to enter `Miscellaneous receipt`.

r. Click **Transaction Lines**.

The Miscellaneous Receipt window opens.

s. Use the LOV to enter the item.

t. Use the Sub Inventory LOV to enter **Stores**.

u. Enter the quantity of the item in inventory.

Note: You must enter a quantity for the item in Inventory. Entering a quantity in Oracle Marketing Online is not sufficient.

---

v. Use the Account Alias LOV to enter `Miscellaneous`.

   w. Save your work.

5. If you are creating electronic collateral then:

   a. Follow the procedures described in the Fulfillment chapter of Oracle CRM Application Foundation Implementation Guide. This chapter explains both how to set up the fulfillment server and how to create your electronic collateral ready for mail merge.

   b. Create the deliverable in the Create Deliverable window of Oracle Marketing Online selecting the Electronic radio button.

   c. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters DELV.

   Note: If no part number appears, then the collateral item will not be available within Oracle TeleSales.

5.31 Setting Up Scripting

Applies to: TeleSales

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

5.32 Setting Up Call Center and Advanced Outbound

Applies to: TeleSales

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

5.33 Setting Up Campaign Schedule Assignment

Applies to: TeleSales with Oracle Advanced Outbound

This step is required only if you are implementing Oracle Advanced Outbound,

In this step you assign campaign schedules to individual sales agents or to whole sales groups. The sales groups are those groups or resources you have created using the Resource Manger, a component of CRM foundation. Campaign schedules are those you created using Oracle Marketing Online.

You can either assign campaign schedules to individual agents or sales groups or assign agents or sales groups to individual campaign schedules. Both procedures outlined below accomplish the same goal.

5.33.1 Assigning Campaign Schedules to Agents

Use this procedure to assign campaign schedules to agents or groups of agents.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Call Center > Campaign Assignment

Steps

The Campaign Assignment window appears.

1. If you wish to assign campaign schedules to individual agents, then under the Assign to heading:
   a. Select the Resource radio button under the Assign to heading.
   b. Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.
   c. Click **Go**:.
   d. Select the individual's name from the list.
   e. The Campaign Assignment window displays the individual's name in the text box. Any campaign schedules already assigned to that individual appear listed below.
2. If you wish to assign campaign schedules to sales groups, then under the Assign to heading:
   a. Select the Resource Group radio button under the Assign to heading.
   b. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.
   c. Click **Go**:.

   d. Select the group’s name from the list.
   e. The Campaign Assignment window displays the group’s name in the text box. Any campaign schedules already assigned to that group appear listed below.
3. To assign campaign schedules to the individual or group:
   a. Click **Add Campaign**.

      A new line appears under the Current Campaign Assignments heading.
   b. Click **Go:**.

      The Valid Campaign Schedule list appears.
   c. Select the name of the campaign schedule you wish to assign.

      The schedule you selected displays on the Campaign Assignment window.
   d. Click **Update**.
   e. Repeat this procedure for each campaign schedule you wish to assign.

5.33.2 Assigning Agents to Campaign Schedules

Use this procedure to assign agents or groups of agents to individual campaign schedules.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Call Center > Agent Assignments

Steps

The Resource Assignment window appears.

1. If you know it, enter the name or a partial name of the campaign schedule in the Campaign Name field. You can use the % sign to substitute for missing characters.
2. Click **Go**.
3. Select the campaign schedule from the list.
4. The campaign schedule name populates the Campaign Name field.

5. If you wish to assign an individual agent to the campaign schedule, then under the Assign to heading:
   a. Select the Resource radio button.
   b. Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.
   c. Click **Go**:.
   d. Select the individual's name from the list.
6. If you wish to assign sales groups to the campaign schedule, then under the Assign to heading:
   a. Select the Resource Group radio button.
   b. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.
   c. Click **Go**:.
   d. Select the group's name from the list.

   The Resource Assignment window displays the name of the individual or group in the list of resources assigned to this campaign schedule.
7. Click **Update**.
8. Repeat this procedure for each campaign schedule you wish to assign.

5.34 Enabling Interaction Tracking and Wrap-up

Applies to: TeleSales

Oracle TeleSales can track customer-related interactions by agents and record the outcome of those interactions, the wrap-up.

To set up interaction tracking you must:

1. Set up the system profiles telling the application what activities you wish interactions to track. See Section 5.34.2, "Deciding What Actions You Want Interactions to Track" on page 5-178.
2. If desired, set up automatic interaction tracking. Section 5.34.3, "Setting Up Oracle TeleSales to Track Interactions Automatically" on page 5-180.
3. If you wish agents to record the outcomes of their interactions on the wrap-up window, then:

a. You must create the categories of outcomes, results, and reasons the agents will use for their call wrap-up. See Section 5.34.4, "Creating Outcomes, Results, and Reasons for Call Wrap-Up" on page 5-182.

b. Optionally, you can restrict different outcomes to different campaign schedules. This way agents working on different marketing campaigns can have access to a different list of outcomes. See Section 5.34.5, "Assigning Outcomes to Campaign Schedules". on page 5-182.

5.34.1 Interaction Overview

Oracle TeleSales can track agent interactions with customers and the different activities within those interactions. The activities an interaction can track includes the modifying and closing of leads and opportunities, the enrollment of contacts in events, the mailing of collateral, the placing of calls to customers, and so on.

The interaction records an activity whenever an agent:

- Creates a new party of any party type.
- Creates a lead
- Ranks a lead
- Declines lead
- Creates an opportunity
- Closes an opportunity
- Enrolls customers or prospects in an event
- Cancels enrollment
- Sends collateral
- Creates a task

Each activity is itself composed of an action and the object of that action, this is called an "action item". Interactions track and record the following actions and action items.

Actions:

- Item added
- Lead ranked
- Lead declined

- Opportunity closed
- Event enrollment
- Event enrollment cancelled
- Item Sent
- Query

Action Items:

- Customer
- Lead
- Opportunity
- Event
- Collateral
- Task

Agents can start an interaction at any time while working in the Opportunity Center, the Lead Center, or the eBusiness Center, by clicking the Start Interaction button on the toolbar. When agents end the interaction by clicking on the Wrap-up button, they enter information about the outcome of the interaction in the wrap-up window. The interaction record lists all the activities the agent performed while the interaction was open.

You can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever an agent queries up or modifies a customer record and ends when an agent queries up a record belonging to another party, changes parties, or closes the form where the interaction began.

You can set up interactions to require agents to record the outcomes of their interactions with customers in a wrap-up window or merely record a default outcome.

How the Application Tracks Interaction Activities for Party Relationships

Interaction activities recorded for any of the party types which make up a party relationship are recorded as being part of the same interaction. For example, if an agent starts tracking an interaction with Jim Jones, the CEO of Acme Corp., then any activity related to Jim Jones, Acme Corp., and Jim Jones, the CEO of Acme Corp., are treated as part of the same interaction. Switching between any of these parties does not close the interaction.

The customer model used by Oracle TeleSales treats any relationships you enter between individuals and organizations as a separate party in the database. For example, when the user creates a new record for Jim Jones, CEO of Acme Corp. the application creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

5.34.2 Deciding What Actions You Want Interactions to Track

Forms Navigation

Old Setup > System Profiles

You must set up the following profile options which decide which activities interactions. This applies to both manual and automatic interaction tracking.

- **OTS: Interactions -Generate Collateral Activity**

  Default setting: No

  Yes: Tracks activities related to collateral.

  No: Disables interaction tracking for the creation of collateral orders. This setting overrides a Yes tracks this category of activities.

- **OTS: Interactions -Generate Customer Activity**

  Default setting: No

  Yes: Tracks activities related to customer records.

  No: Disables tracking of activities related to customer records.

- **OTS: Interactions -Generate Event Activity**

  Default setting: No

  Yes: Tracks activities related to events.

  No: Disables tracking of activities related to events.

- **OTS: Interactions -Generate Lead Activity**

  Default setting: No

  Yes: Tracks activities related to leads.

  No: Disables tracking of activities related to leads.

- **OTS: Interactions -Generate Opportunity Activity**

Default setting: No

Yes: Tracks activities related to leads.

No: Disables tracking of activities related to leads.

- **OTS: Interactions-Generate Task Activity**

  Default setting: No

  Yes: Records the creation of new tasks.

  No: Disables the recording of task creation.

- **OTS: Interactions -Default Outcome**

  Default setting: Outcome with outcome id = 1 (No Answer)

  This profile determines the default value of the Outcome field in the wrap-up widow.

  This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome associated with the campaign schedule for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign schedule.

- **OTS: Interactions -Default Action**

  Default setting: Query

  Users must perform at least one activity for the interaction to end. If user doesn't perform any activity but ends the interaction anyway, then the application uses the default action set in this profile and the default action item from the profile OTS: Interaction Default Action Item.

- **OTS: Interactions -Default Action Item**

  Default: Query

  The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction Default Action whenever the user does not perform an action required to wrap up an interaction.

- **OTS: Interactions -Record Media Item ID**

  Default setting: Yes

  Interactions track different types of communications with customers including emails and phone calls placed via Oracle inbound and outbound telephony applications. The record includes a unique identifier for the communication.

This profile determines if that unique identifier is recorded or not. This identifier is never displayed for the user.

A setting of Yes records the identifier. A setting of No does not record the identifier.

5.34.3 Setting Up Oracle TeleSales to Track Interactions Automatically

Forms Navigation

Old Setup > System Profiles

To track interactions automatically, you must set up the following additional system profiles:

- **OTS: Interactions -Enable Automatic Start**

  Default setting: No

  A Yes setting for this profile option enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting and ending interactions manually.

- **OTS: Interactions -Start on Query**

  Default setting: No

  A setting of Yes starts an interaction whenever the user displays a new record from a different party. For example, if the user is working on an opportunity for AT&T Corp. and opens up a lead from Acme Corp., then the application closes the first interaction and opens up a new one for Acme Corp. If both the opportunity and lead come from AT&T, then no new interaction is started.

  A setting of No starts a new interaction only when the user updates or deletes information in a record or creates a new record for a new party. The user working on an opportunity for AT&T Corp.has to update the lead from Acme Corp. before the application starts a new interaction for Acme. Merely viewing the lead will not close the AT&T interaction.

- **OTS: Interactions -Enable Auto Wrapup**

  Default setting: No

  When this profile is set to No, the wrap-up window appears automatically prompting users to enter the outcomes and reasons for the activity.

  When this profile is set to Yes, then the interaction ends automatically without the users seeing the wrap-up window.

The interaction ends when:

- The user starts work on a record from a different party.

  Whether this happens on update or query depends on the setting of OTS: Interactions -Start on Query, as described above.

- The user closes the window where the interaction was started.

  For example, if a user starts an interaction while viewing an opportunity in the Opportunity Tab of the eBusiness Center and then opens that same opportunity in the Opportunity Center, then the interaction does not end when the user closes the Opportunity Center. It ends only when the user closes the eBusiness Center.

Note: In this release, the wrap-up screen appears automatically only when users close the form using the close button at the top right hand side of the form. If they close the form using the close button on the toolbar or by choosing Close Form from the File menu, then the interaction is closed automatically without

The following examples illustrate the use of these profile settings:

Example: Enabling Automatic Interaction Tracking for Opportunities

Imagine, for example, that you wish to enable automatic interaction tracking for all agent activities relating to opportunities and you want the tracking to start whenever an agent updates a record. You want the tracking to happen in the background, without the agent having to perform any extra data entry.

You must set the following system profiles to the values indicated:

- OTS: Interactions -Enable Automatic Start

  Setting this profile to Yes enables the automatic tracking.

- OTS: Interactions -Generate Opportunity Activity

  Setting this profile to Yes enables the tracking of activities related to Opportunities.

- OTS: Interactions -Start on Query
- Setting this profile to No means that interaction tracking starts only when a record is updated for the first time.

- OTS: Interactions -Enable Auto Wrapup

  Setting this profile to Yes means that the interaction ends automatically without agents having to make entries in the wrap-up window.

The interaction ends automatically when the agent closes the window or changes the party in the window where the interaction was first started. For example, if a user opens up the eBusiness Center and starts and interaction on the Opportunity tab and then opens the Opportunity Center, then the interaction ends only when the user changes the party in or closes the eBusiness Center.

Because the application must record at least one activity for an interaction to end, you must set up the default activity which is recorded if an agent closes a window without performing any of the activities. To set up the default activity, you must set two related profiles OTS: Interactions -Default Action and OTS: Interactions -Default Action Item.

5.34.4 Creating Outcomes, Results, and Reasons for Call Wrap-Up

Forms Navigation

CRM Foundation > Interaction History Administration

If you wish agents to record the outcomes of interactions with customers using the wrap-up window, then you must populate the different lists of values the agents will use for that purpose. This means setting up the different outcomes, results, and reasons. See the Interaction History section of the *Oracle CRM Applications Foundation Implementation Guide* for details.

5.34.5 Assigning Outcomes to Campaign Schedules

Use this procedure to assign outcomes to marketing source codes. This way agents who are working with customers classified by different source codes can have different outcome classifications available to them to wrap up calls. For example, you may wish to use "leave message" as a possible outcome for a customer satisfaction campaign, but not for a sales campaign.

Although sales agents see all marketing activities as source codes, you must assign the outcomes only to the marketing activity called a campaign schedule. Campaign schedules must be created in Oracle Marketing Online.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Call Center > Outcome Assignments

Steps

The Campaign Outcome Assignment page appears.

1. Click **Go** to the right of the Campaign Schedule field.
2. The Source Code window appears listing all of the available campaign schedules.
3. You can use the Keyword field to search for the campaign schedule of your choice:
   a. Enter a partial name in Keyword. You can use % sign to substitute for missing characters.
   b. Click **Search**.

      The Source Code page now lists only those campaign schedules matching your search criteria.
4. Click on the Name of the campaign schedule. This is a link.

   The Campaign Outcome Assignments page appears.
5. For each outcome you wish to add:
   a. Click **Add Outcome.**
   b. In the Outcome Code column click **Go** to the rights of a blank record.

      The Outcome list of values window appears listing all of the available outcomes.
   c. You can use the Keyword search to restrict the list.
   d. Select the outcome you wish to add by clicking on the name link.

      The outcome populates the Outcome Code field on the Outcome Assignment page.
6. Click **Update**.

5.35 Enabling Web Directory Assistance

Applies to: TeleSales

Use this procedure to enable web directory assistance for agents.

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Call Center > Web Assistance

Steps

The Web Assistance page appears.

1. Click **Create Web Assistance**.

   The Create Web Assistance page appears.

2. Using another browser window, navigate to the web directory assistance service you want to use.
3. Perform a search for any individual. For example, for John Doe in California.

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

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

   The search returns a page with the following URL:

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

4. In the Proxy Host field, enter the name of your organization’s proxy server.
5. In the Port field, enter the port number for the proxy server.
6. In the Search URL field, enter the part of the URL before the question mark (?).

   In the SuperPages.com example, you copy and paste the following: `http://wpg2.superpages.com/wp/results.phtml`

7. In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant when you perform different searches.

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

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

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

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

9. Enter the switch separator. The switch separator is always the ampersand (&).

10. Enter the URL separator. The URL separator is always the question mark (?).

11. Click **Update.**

    The Web Assistance page displays the web assistance you saved.

12. Click the ID number for the web assistance you created.

    The Web Assistance Details page appears.

13. Click **CGI Switches**.

    The CGI Switch Details page appears.

14. Create each switch to include in the search. The switches are the CGI script variables used for your search criteria. Each switch is followed by an equals (=) sign. In the SuperPages.com example these are: `WF`, `WL`, `T`, and `S`. For each switch:

    a. Click **Create CGI Switch.**

       The Create CGI Switch page appears.

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

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

    d. Enter plus (+) for the data separator.

    e. Select Y next to the search criteria related to this switch. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.

f. Set the Enable field to Y. Any disabled switch has a corresponding disabled field on the Directory Assistance page.

g. If user entry for this switch is required by the web assistance service, then select Y for the Required field. Look on the search web page to find out what fields are required. In the SuperPages.com example last name is the required field.

h. Click **Update**.

The Web Assistance Details page displays the new switch.

15. After testing your settings, set Enabled to Y.

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

16. Select yes or no for the directory assistance flag. Only one web directory can be used for directory assistance.

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

5.36 Installing Field Sales/Laptop

Applies to: Field Sales/Laptop

Install Oracle Sales Online Release 11i and verify that the its prerequisite products and dependencies are properly installed. Refer to the *Oracle Sales Online Implementation Guide* for more information.

Login

Sales Online Super User

Responsibility

Sales Online Super User

Please note, the login and responsibility for all Field Sales/Laptop installation steps is Sales Online Super User.

Upgrading from a previous version

If you are upgrading from a previous version of Oracle Field Sales/Laptop, we recommend that you:

- Synchronize data before upgrading
- Refer to the Mobile Device Gateway documentation for tips on handling upgrade issues for the Mobile Device Gateway.

If you have problems upgrading, please try to re-install the application and refer to the Troubleshooting section of this guide.

5.36.1 Checking Post Installation Steps

Applies to: Field Sales/Laptop

Check for the following post installation steps on the Applications Database necessary for the Gateway.

- Ensure Advanced Replication is installed
- Check for Advanced Queues
- Verify the Unique Global Name
- Modify Oracle Applications Database Parameters
- Run snapshot log creation scripts
- Set System Profile Option Values

Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide*

5.36.2 Setting Up the Mobile Device Gateway

Applies to: Field Sales/Laptop

The Oracle CRM Gateway for Mobile Devices is also referred to as MDG or Gateway throughout this document. For further details about installing MDG, please refer to the *Oracle CRM Gateway for Mobile Devices Implementation Guide*.

- Create the Oracle 8i (8.1.7.2) Database for MDG
- Set `init.ora` parameters
- Create `ADMIN` user and table spaces
- Load the `asgmtran.jar` file from the applications file system in the enterprise machine to the MDG database
- Configure Net8

- Verify Unique Global Name

5.36.3 Downloading and Installing Patches for Gateway

Applies to: Field Sales/Laptop

Please download and install the latest Gateway patches. Patches are available on Oracle's website at *www.oracle.com/support/metalink*.

- Download the latest Gateway patches from www.oracle.com/support/metalink
  - MDG 11.5.6
- Install the latest Gateway patches

5.36.4 Installing Oracle 9i Lite Synchronization Server

Applies to: Field Sales/Laptop

Refer to the Oracle CRM Gateway for Mobile Devices Implementation Guide to find more detailed procedures.

- Install Oracle 9i Lite Synchronization Server (Version 5.0.0.0.0)
- Install the Oracle 9i Lite patch (Version 5.0.0.4.0)
- Configure Oracle 9i Lite Message Generating Process (MGP)
- Start the Synchronization Server

This installation is the middle-tier or CRM Gateway for Mobile Devices.

5.36.5 Publishing Oracle CRM Mobile Foundation to Gateway Server

Applies to: Field Sales/Laptop

Steps

1. Copy Oracle CRM Foundation from $APPL_TOP/html/download/jtm/jtm.zip
2. Extract the zip file onto the middle-tier machine in the directory you create called JTM_TEMP.
3. Run file JTMpublish.bat to publish the Oracle CRM Mobile Foundation to the Gateway Server.

5.36.6 Publishing Field Sales/Laptop

Applies to: Field Sales/Laptop

Steps

1. Copy Oracle Field Sales/Laptop from $APPL_TOP/html/download/asl/asl.zip.
2. Extract the zip file onto the middle-tier machine in a directory you create called ASL_TEMP.
3. Run file ASLpublish.bat to publish the Oracle Field Sales/Laptop to the Gateway Server.

Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i*

5.36.7 Administering Mobile Device Gateway

Applies to: Field Sales/Laptop

Refer to the *Oracle CRM Gateway for Mobile Devices Implementation Guide* to find more detailed procedures.

- Set MDG System Profile Option Values
- Create Oracle Application User for MDG Web Administration Console
- Set up Mobile Users
- Schedule Concurrent Programs
- Monitor the Refresh and Queue Jobs on the Gateway Database

Note: When setting up Mobile Device Gateway, make sure that you select the Installed Field Sales/Laptop check box if you do not have the Service application running.

5.36.8 Setting Up Mobile Users

Applies to: Field Sales/Laptop

Before creating a mobile user on the Gateway, you must define the user in Oracle Applications as an Oracle Sales Online User and Oracle Mobile Field Sales User.

Reference: *Oracle Applications System Administrator's Guide,* Managing Oracle Applications Security, Users Window, Responsibilities Block.

1. Login as `asgadm.`
2. Click the **Mobile User** tab.
3. In the Mobile User tab, choose **Create**.

   The Create Mobile User page opens. Search for the Oracle Applications users to be set up as mobile users. You can search based on name or territory.
4. Choose **Next**. The search results are displayed. Select the users you want to create as mobile users.
5. Choose **Next**. Enter default information about all the users. You can choose a common prefix, suffix (for their usernames), password, and application.
6. Choose **Next**. A list appears of all the Oracle Applications users you want to create as mobile users with all the relevant information such as mobile user name and application. You can change the information for any user on this page.
7. Choose **Create**. Check the status of creation on the mobile user tab:
   - **Confirmed**: The mobile user creation process was successful.
   - **Not Confirmed**: The mobile user creation process was aborted. Click Open Logs on the mobile user page to check the errors in the creation logs. To fix the errors and re-create the user, delete the user and create the user again.
   - **Pending**: The mobile user creation process is in progress. If the status remains pending for a very long time, click Open Logs in the mobile user page to check the creation logs.

   Note: Always wait until the status of the first user created is set to Confirmed before you create any subsequent users. If you attempt to create more mobile users before the first user is succesfully created, the process may fail.

   A mobile user cannot start to synchronize unless the status has been set to Confirmed.

5.36.9 Giving Access to Users

Applies to: Field Sales/Laptop

Steps

1. Log in to OLite server as System Administrator.
2. Click the Control Center link/icon.
3. Click the Applications tab.
4. Click the Go link within the Find Applications section.
5. Click the Oracle Field Sales/Laptop link.
6. Click the Security link.
7. Select the checkboxes to give users access.
8. Click Save.

5.36.10 Installing the Application on a Laptop

Applies to: Field Sales/Laptop

Installing the application on your laptop includes the following tasks:

- Administrator sends user login name and password
- Mobile user follows steps to login and use the application

5.36.11 Administrator Tasks

Applies to: Field Sales/Laptop

The System Administrator sends an email to the laptop user with the Web to Go URL (Universal Resource Locator) and the login user name and password.

The URL is: http://WTGSERVER/setup

5.36.12 Mobile User Tasks

Applies to: Field Sales/Laptop

Steps

1. While online, navigate to the URL given to you by the system administrator.
2. Select the Oracle Field Sales/Laptop link and run `setup.exe`.

   This installs OracleLite and Web to Go and brings up the login page.
3. Enter your user name and password.
4. Click the **Logon** button.
5. Click the Next link. This will synchronize the application and data.
6. Click **Field Sales Laptop**.

5.36.13 Troubleshooting Field Sales/Laptop

Applies to: Field Sales/Laptop

The following sections are intended to help Field Sales/Laptop users with possible solutions to common problems.

5.36.14 Application Errors

Applies to: Field Sales/Laptop

You may encounter the following application errors while working with Field Sales/Laptop.

1. After clicking on the Oracle Field Sales/Laptop icon or link, the error message "JBO-Exception, Application Module is not connected to database" appears or if the application takes a long time to connect.

   Possible problems or solutions:

   a. The ASL DSN is not ready. To verify, check file odbc.ini. This is usually found in <c:\winnt\odbc.ini>. Verify that the entry ASL DSN points to the correct asl.odb, which should be your ${cons_dir}\oldb40\asl.odb.

   b. ODBC driver is not correct. Please use registry editor to check HKEY_LOCAL_MACHINE\Software\ODBC entry and verify the OLite

4.0 driver entry is pointing to the web to go directory specified during installation.

c. JRE 1.2.2 is not installed. Verify if JDK 1.3 is installed. If it is, it prevents JRE 1.2.2 from installing. Remove JDK 1.3 and re-install

2. Web to Go fails to run.

   Possible problems or solutions:

   a. Open MS DOS and navigate to the directory where `webtogo.exe` is located. Run the executable file by typing "webtogo-d0" in the command line. If there is a problem, you will receive an error message giving you more information.

   b. If the error says the port is occupied, it means that other web servers are running. Shutdown the other web servers on the computer.

   c. If the error says it cannot mount the webtogo IFS, please check c:\winnt\odbc.ini for the correct WEBTOGO DSN. Also, check if webtogo.odb exists in your oldb40 directory.

3. After you log in the first time, the Oracle Field Sales/Laptop link does not appear on your work space.

   Possible problems:

   a. Oracle Field Sales/Laptop was not published to the repository

   b. User was not assigned the access to the application.

   Possible solution:

   c. To give access to the user. Go to the section entitled Giving Access to Users for instructions.

   d. If the application was published properly and the user was given proper access, click the Sync tab to download the application again. If you receive a POL-4800 error, the ODBC.ini is incorrect in either Web to Go or [USER_NAME]_CONSCLI entry. One of them is pointing to the wrong directory for it's odb file. Correct and retry.

4. If you are having problems with Web to Go, you may need to un-install the program manually.

   Possible solutions:

   1. Clear any old installations of the application.

a. Clear the registry by going to HKEY_CURRENT_USER\Software\ODBC\ODBC.INI and delete all the obsolete key and value entries.

b. Clear the registry by going to HKEY_CURRENT_USER\Software\ODBC\ODBC.INI\ODBC Data Sources and delete all the obsolete value entries.

c. Modify C:\WINNT\odbc.ini and remove all the obsolete entries.

d. Remove C:\WINNT\polite.ini

e. Clear your browser cache.

2. Un-install JRE1.3 by going to HKEY_LOCAL_MACHINE\SOFTWARE\JavaSoft\Java Runtime Environment and clear the current version.

5. If you are having problems with Windows 2000, you should disable the browser proxy settings and use the "directly connect to network" option instead.

5.36.15 Synchronization Errors

Applies to: Field Sales/Laptop

You may encounter the following synchronization errors while working with Field Sales/Laptop.

1. If you synchronize and lose all new information, check to make sure that the MGP is running before any synchronization. If the MGP is not running before synchronization, you may lose your new data.

   Reference: *Oracle Mobile Device Gateway Implementation Guide* for information about MGP

2. After synchronizing the data you receive the message "Sync Success", but the data you received does not appear to be correct.

   Possible problems or solutions:

   a. Verify that callouts on the enterprise database are enabled. Also, run $asl/patch/115/sql/aslchkev.sql on the enterprise server database.

   b. Verify that snapshot refresh job is running correctly. We recommend that you use the Oracle Enterprise Manager on the middle-tier machine to check if the job "asg_queue_pkg.refresh_TXN" is running correctly. Alternatively, you can use sqlplus to check dba_jobs.

c. Check to see if the primary key is enabled in enterprise database. Run $asl/patch/115/sql/aslchkpk.sql to check if some table's pk is missing.

d. Verify that Mobile Gateway P is running. MGP is a process that runs all the time on the Mobile Device Gateway (MDG) machine. You can check to see if it is running in a DOS window on the middle tier server.

e. Verify that the MDG machine is pointed to the correct enterprise database.

3. Error Code when syncing

   Possible problems or solutions:

   a. 9023: means that the conscli.odb does not match asl.odb. The easiest way to correct this problem is to delete both odb files and repeat the synchronization.

   b. 3012: means that you are still running your application while trying to synchronize. The best way to correct this problem is to logout of Field Sales/Laptop; shutdown the Web to Go server and repeat the synchronization.

4. Data is uploading from the laptop to the MDG but the data is not showing up on the enterprise database.

   Possible problems or solutions:

   a. Check the AQ to see if the de-queue job is running properly and propagation is running properly by running these sql statements on the enterprise database:

   - Select count (*) from asg.aq$asg_mtran_qtab at apps/apps@backend
   - Select count (*) from asg.aq$asg_mtran_qtab at admin/admin@mdg

   Both must be 0.

5.37 Installing Field Sales/Palm

Handheld devices are becoming more important to today's mobile sales force. Giving mobile users the ability to view sales data through a Palm handheld device is an important tool that Field Sales/Palm sales reps can use to gain an advantage. Users need instant access to customer data and Oracle Field Sales/Palm gives them access in a convenient way.

Applies to: Field Sales/Palm

Login
Sales Online Super User

Responsibility
Sales Online Super User

Please note, the login and responsibility for all implementation steps for Field Sales/Palm is Sales Online Super User.

Prerequisites
Sales Online and Sales Online's dependencies must be properly installed.

5.37.1 Publishing Field Sales/Palm

Applies to: Field Sales/Palm

Steps
1. Copy Oracle Field Sales/Palm from:

   `$APPL_TOP/html/download/asp/asp.zip`

2. Extract the zip file onto the middle-tier machine in a directory you create called `ASP_TEMP`.
3. Run file `ASPpublish.bat` to publish Oracle Field Sales/Palm to the Gateway Server.

Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i*

5.37.2 Setting Up Users

Applies to: Field Sales/Palm
Before creating a mobile user on the Gateway, you must define the user in Oracle Applications as an Oracle Sales Online User and Oracle Mobile Field Sales User.

Reference: *Oracle Applications System Administrator's Guide,* Managing Oracle Applications Security, Users Window, Responsibilities Block.

1. Login as `asgadm.`

2. Click the **Mobile Server** tab.
3. Select **Create**.
4. When selecting a user, make sure the user has a Field Sales role.
5. Send each mobile user the IP address of the Gateway server and user name and password through email.

5.37.3 Giving Access to Users

Applies to: Field Sales/Palm

Steps

1. Log in to OLite server as System Administrator.
2. Click the Control Center link / icon.
3. Click the Applications tab.
4. Click the Go link within the Find Applications section.
5. Click the Oracle Field Sales / Palm link.
6. Click the Security link.
7. Select the checkboxes to give users access.
8. Click **Save**.

5.37.4 Downloading and Installing Consolidator, Oracle 9*i* Lite, and Bootstrap

Applies to: Field Sales/Palm

This section describes how to install the Consolidator client (Oracle9*i* Client Library) and ensure that your browser is configured to connect to the CRM Gateway for Mobile Devices (Synchronization Server).

This configuration includes installing the Oracle 9*i* Lite database.

The Bootstrap for Palm is downloaded in this procedure and installed on the Palm device in the step entitled Performing a Hotsync of all iConnect Palm Components.

Prerequisites

Synchronization Server name for downloading.

Steps

1. Start your Web browser and connect to the Synchronization Server (Web-to-go server) by typing the following Universal Resource Locator:

   `http://<server_name>/setup`

   Note: Replace the <server_name> variable with the host name of the Synchronization Server.

   The Oracle CRM client setup screen is opened with a section to download the CRM client setup program and updates when available.

2. Choose to Download the Palm client.
3. Save the file on your hard drive.
4. Choose a directory, for example, `C:\orant`, and click **OK**. The setup program downloads all the required components.
5. After you download the necessary files, the setup program prompts you to select a Palm user.

   Note: If the Palm desktop is not installed, the setup program will prompt you to install it and then terminate. Once you have installed the Palm desktop and created a user, run the setup program from <% install OLite client dir%>\palm\palminst.exe

6. When you successfully create a Palm user, the setup program informs you that the components are successfully installed and will be uploaded with the next hotsync.

5.37.5 Performing a Hotsync of All iConnect Palm Components

Applies to: Field Sales/Palm

Perform a Hotsync of all iConnect Palm components. This installs all of the iConnect client modules for Palm onto the Palm Device.

Note: Oracle’s installation mechanism does not use the Palm Desktop Install tool.

5.37.6 Configuring Windows Remote Application Server (RAS)

Applies to: Field Sales/Palm with Windows NT or 2000 with COM port

Replicating with the Palm Computing Platform using Scout or HTTP requires the TCP/IP communication protocol. Palm uses serial lines for connection to the network. This step provides instructions for enabling TCP/IP communications for handheld devices using Windows NT RAS.

Perform this procedure to enable TCP/IP communications between handheld devices and your Windows NT server using Windows NT RAS.

The first type of connection requires the following setup steps:

- Setting up a RAS Server as described in Configuring Windows Remote Application Server (RAS) and Creating a RAS User for the Palm Device.
- Setting up the Palm Device as described in Configuring the Palm Device (connected to a PC Client).

The second possible connection requires the following setup steps:

- Setting up a RAS Server as described in Configuring Windows Remote Application Server (RAS) and Creating a RAS User for the Palm Device.
- Setting up the Palm Device as described in Connected to a RAS Client.

The final connection option requires the following setup steps:

Prerequisites

None

Steps

1. In the Windows Control panel, double-click the **Network** icon.
2. Click the **Add** button in the Services tab of the Network window.
3. Select Remote Access Service and then click the **OK** button.
4. Insert the Windows NT CD-ROM into the CD-ROM drive and specify the location where you want the setup program to search for existing Windows NT RAS files. Click the **Continue** button. The setup program copies the Windows NT RAS files into the appropriate directories. If the setup program fails to detect a modem, it prompts you to add a modem.
5. Click the **Yes** button and enter the required information to install a modem.

   The Add RAS Device window appears.
6. Select COM1-Dial-Up Networking Serial Cable from the drop-down list.

   When no COM1-Dial-Up Networking Cable option is available from the drop-down-list, perform the following steps to add it to the drop-down-list.

a. Click **Install Modem**. The Install New Modem dialog window appears.

b. Check **Don’t detect my modem**.

c. Select Dial-Up Networking Serial Cable.

d. Select the port on which the Palm device is connected.

e. Click **Next**.

f. Click **Finish** to leave the Install New Modem dialog window and return to the Add RAS Device window and select the option from the drop-down-list.

7. Click the **OK** button.

   The Remote Access Setup window appears.

8. Under Port, select COM1 and click the **Configure** button.

   The Configure Port Usage window appears.

9. Select the "Receive calls only" radio button and click the **OK** button.

10. Click the **Network** button in the Remote Access Setup window.

    The Network Configuration window appears.

11. Select TCP/IP and click the **OK** button.

    The RAS Server TCP/IP Configuration window appears.

12. Select **Entire Network** and **Use Static Address Pool**.

    Important: You must ensure that the TCP/IP addresses in your selected range are not already in use by other computers in your network.

13. You can specify a range of TCP/IP addresses for multiple devices. Enter the beginning of a TCP/IP address range in the Begin field and enter the ending of a TCP/IP address range in the End field.

    The range should be equal to the number of clients plus 1. Typically one Palm device is connected to the COM port, therefore the End address will be one number higher than the Start address.

    Example: If you have fifty devices you could define the following range:

    Begin: 10.1.0.1

    End: 10.1.0.51

Note: Define a range of TCP/IP addresses compliant with your own network, do not use the example above.

14. Click the **OK** button.
15. In the Network Configuration window, select Any Authentication Including Clear Text, and click the **OK** button.

    The Remote Access Setup window appears.
16. Click the **Continue** button.

    The Setup Message window appears.
17. Click the **OK** button.

    The Network window appears.
18. Click the **Close** button.

    The Network Settings Change window appears.
19. Click **Yes** to restart the system.

    When the system is restarted and you have logged again an error message might be shown, describing that HotSync manager is unable to open COM1. Ignore this error message.
20. Once the system reboots, click the **Services** icon in the Windows Control Panel.

    The Services window appears.
21. Select Remote Access Server and click the **Startup** button.
22. Select Automatic and click the **OK** button.
23. Click the **Close** button.
24. Logon as a local administrator.
25. From the Windows Start menu select Administrative Tools and then select User Manager.

    The User Manager window appears. Proceed to Creating a RAS User for the Palm Device.

5.37.7 Creating a RAS User Account for the Palm Device

Applies to: Field Sales/Palm

Prerequisites

Configuring Windows Remote Application Server (RAS)

Steps

1. Select New User from the User menu.

   The New User window dialog appears.

2. Enter a user name, password, and password confirmation in the required fields.
3. Select Password Never Expires.
4. Click the **Dial-In** button.

   The Dial-In Information dialog appears.

5. Select Grant Dial-In Permission to User. Click the **OK** button.
6. Click the **OK** button to exit the New User dialog.
7. Exit the User Manager screen.
8. From the Windows Start menu select Administrative Tools and then select Remote Access Administration.

   The Remote Access Admin window appears.

9. Verify that the new RAS user is granted remote access permission and click the **OK** button.

5.37.8 Configuring the Palm Device

Applies to: Field Sales/Palm

Configuring the Palm Device connected to a RAS Client is described in the Connected to a RAS Client section; Configuring the Palm Device connected to a wired modem is described in the Connected to a Wired Modem section.

Connected to a RAS Client

To configure HTTP as the transport mechanism for Palm use one of the following procedures:

- For Palm 3.5
- For Palm 4.0

Steps

1. Tap the **OK** button to close the Log in Script dialog.
2. Tap the **OK** button again to close the Details dialog.
3. Place the device in the HotSync cradle.
4. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

5.37.8.1 For Palm OS 3.5, 4.0

1. In the Preferences screen of the Palm Computing Platform device, select **Connection** from the menu.

   The Preferences screen appears.
2. Tap **New**.

   The Edit screen appears.
3. Enter the following:

Field	Value for Palm 3.5
Name	HTTP
Connection Method	Serial to PC

Field	Value for Palm 4.0
Name	HTTP
Connection Method	PC
Via	Cradle / Cable

4. Tap **Details**.
5. Select 19,200 bps from the Speed drop down list.
6. Tap **OK** to close the Edit screen.
7. Tap **OK** to close the Preferences screen.

8. Select **Network** from the menu.

   The Preferences screen appears.

9. Enter the required information in the fields of the Network Preferences screen:

Field	Value
Service	Windows RAS
User Name	The user's name
Password	The user's password
Connection	HTTP Note: Value entered at step 3 in Name field.
End	No information required

10. Tap the **Details** button.

    The Details dialog appears.

11. Ensure that IP Address: Automatic is selected.

12. Tap the **Script** button.

    The Log in Script dialog appears.

13. Enter the following:

Field	Value
Send CR	no information required
Delay	1
Send	CLIENT
Wait For	CLIENTSERVER
End	No information required

14. Tap the **OK** button to close the Log in Script dialog.

15. Tap the **OK** button again to close the Details dialog.

16. Place the device in the HotSync cradle.

17. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

Connected to a Wired Modem

Steps

1. Tap the Applications picker.
2. Tap Prefs.
3. In the Preferences screen of the Palm Computing Platform device, select **Modem** from the menu. The Preferences screen appears.
4. Verify that the Speed is set to 19200 bps.
5. Select Network from the Menu. The Preferences screen appears.
6. Enter the required values in the following fields:

Field	Value
Service	Windows NT RAS
User Name	The user's name
Password	The user's password
Phone	Telephone number of modem to dial

7. Tap the **Details** button. The Details dialog appears.
8. Ensure that the Connection Type is set to PPP.
9. Ensure that the Query DNS is not tapped.
10. Enter the primary DNS and Secondary DNS of the RAS system.
11. Ensure that for IP Address: Automatic is selected.
12. Tap the **Script** button. The Log in Script dialog appears.
13. Enter the following:

Field	Value
Send CR	No information required
Delay	1

Field	Value
Send	CLIENT
Wait for	CLIENTSERVER
End	No information required

14. Tap the **OK** button to close the Log in Script dialog.
15. Tap the **OK** button again to close the Details dialog.
16. Place the device in the HotSync cradle.
17. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

the required values in the following fields:

5.37.9 Configuring and Executing the iConnect Consolidator Client on Palm Computing Platform Devices

Applies to: Field Sales/Palm

Use this procedure to configure the iConnect Consolidator client on the Palm Device.

This procedure installs the Oracle Field / Sales application and the database on the Palm Device.

Prerequisites

None

Steps

1. Start the iConnect Consolidator (consolidatorClient.prc) on the handheld device.

   The iConnect Consolidator Sync screen appears.

2. Enter the following values in the fields:

Field	Value
User Name	iConnect Consolidator client user name. This must be written in uppercase.

Field	Value
Password	iConnect Consolidator client password. This field is case sensitive.
Change	Leave this check box unselected.
Save Password	Select this check box to save the iConnect Consolidator client password.
http://<machine.IP>/Consolidator	Enter the HTTP listener machine's IP address. The complete URL http://machine.IP/webtogo/Consolidator is not displayed on the device screen. It is not necessary to enter "/webtogo" after the machine IP address.
Use Proxy	Select if appropriate.

3. Tap the **Apply** button.
4. Tap the **Sync** button.

   A progress bar indicates the completion of each synchronization task: composing, sending, receiving, and processing. If synchronization executes successfully, the synchronization Success screen appears.

   If synchronization fails, an error message appears. To determine the cause of a failed synchronization, the server administrator can view tracing information on the Synchronization Server.

5.38 Installing Field Sales/Wireless

Applies to: Field Sales/Wireless

Oracle's Mobile Sales products were created to give salespeople easy access to sales related data while they are traveling. Sales representatives can create, view, and update customer sales information on a Laptop, Palm, or Wireless device without a network connection. Information is accessed and stored locally and later synchronized with Oracle's eBusiness Suite. During synchronization, the sales rep also receives updated information from the E-Business Suite.

Field Sales/Wireless provides this same functionality to view and update customer information on a wireless handheld device, however, the main difference is that the access is real-time through wireless networks.

Login

System Administrator

Responsibility

Sales Online Super User

Prerequisites

Installing and using Field Sales / Wireless depends on the successful implementation of Sales Online and Sales Online's dependencies.

If you intend to use the features provided by Oracle Incentive Compensation and Oracle Fulfillment, you should make sure those are set up within the Sales Online implementation steps.

5.38.1 Setting Up Field Sales/Wireless

Applies to: Field Sales/Wireless

Follow these steps to set up a Field Sales / Wireless user:

Prerequisites

The responsibility ID of "Sales Online Wireless User" must be created.

Steps

Use this procedure to assign wireless responsibility to the application user. The profile options for the Oracle Field Sales / Wireless user are set up once per user.

1. Log in to the Oracle applications as System Administrator.
2. Navigate to **Profile > System**.
3. In the Profile field, enter JTFW% and click **Find**.
4. Enter the value 22726.

The value can be setup at the site level to enable all users or it can be set at a individual user level just to Wireless enabled select users.

The number 22726 is the responsibility ID of "Sales Online Wireless User". Make sure that you have the responsibility already set up.

5.38.2 Setting Up the Wireless Edition Server

Applies to: Field Sales/Wireless

Follow these steps to set up the Wireless Edition Server:

Prerequisites

For detailed instructions about installing the server, please refer to the *Oracle 9i Application Server Documentation, Release 1*.

Steps

1. Install the 9iAS Wireless Edition Server.
2. Create a service that points to `jtfwlgnm.jsp` file in the application HTML top.

   ```
   http://your.middletier.com:PORT/OA_HTML/jtfwlgnm.jsp
   ```

5.38.3 Creating Master Documents for Fulfillment (Optional)

Applies to: Field Sales/Wireless

Prerequisites

Fulfillment must be set up in Sales Online.

Steps

To create a master document and associate it with a query, please refer to the following sections of the *Oracle CRM Foundation Concepts and Procedures guide, Administering Fulfillment* chapter. The sections you will need are outlined below, in the order you will need to perform them:

- Creating a Datasource File
- Downloading a Datasource File
- Uploading a Master Document
- Uploading a Master Document to the Marketing Encyclopedia System

Create master documents using seeded queries. The seeded query information is listed below:

- Query Identifier: 401

- Query Name: OSO Fulfillment Query

Please note, electronic delivery (via email) is the method of delivery that is supported for fulfillment.

6

Verifying the Implementation

This topic group provides you with steps necessary to verify implementation of:

- Section 6.1, "Implementation Verification Tasks" on page 6-1

6.1 Implementation Verification Tasks

To verify that you properly implemeted Oracle Sales Online, Field Sales / Laptop, Field Sales / Palm, and Field Sales / Wireless, perform the following tasks.

For information on the procedures necessary to perform these tasks, see the *Oracle Sales Online Concepts and Procedures*.

1. Create an opportunity.
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. Enter details for the opportunity.
4. Click **Create**.

If you can successfully create an opportunity, the basic functions of the product are working. Conditional dependency functionality is based upon the other modules that you are using. Please refer to Section 3.1, "Mandatory Dependencies" and Section 3.2, "Conditional Dependencies" for more information.

A

System Profile Options

This appendix provides a table of all of the system profile options used by the Oracle Sales Family of eBusiness Suite applications. Each system profile option in this table is also described in the implementation step where it is set. This table compiles all system profile options and arranges them in alphabetical order by name.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)

A.1 Setting System Profile Options

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

Use this procedure to set or change profile options.

Steps

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

   The Find System Profile Values window appears.

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

   The profiles are displayed in the System Profile Values window.

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

A.2 Table of System Profile Options

The following table lists by name and in alphabetical order the system profiles used by the Oracle Sales Family of eBusiness Suite applications. The table includes the following columns from left to right:

- **Req**. (Required): A Y in this column indicates the profile is required for the applications or functions.
- **New**: A Y in this column the profile is new for this release.
- **Profile Name**: Name of the profile.
- **Product**: Lists the products which use the profile.
- **Functions**: Lists the functional areas affected by the profile.
- **Description**: Explains what the profile does.
- **Default**: Lists the seeded default for the profile, if any.

Req.	New	Profile Name	Product	Functions	Description	Default
		AMS: Should Call To Inventory Modules To Be Made	TeleSales	Events	Must be set to *Yes* for Oracle TeleSales.	

Req.	New	Profile Name	Product	Functions	Description	Default
		AMS: Should Call to Pricing Modules to Be Made	TeleSales	Events	Must be set to *Yes* for Oracle TeleSales.	
		ASL: Conflict Flag	Field Sales/Laptop	Conflict resolution	If 'Y', it means client wins, if 'N', it means server wins.	
		ASL: Default MTL Organization ID for Field Sales/Laptop	Field Sales/Laptop			
		ASL: Enable Attachment	Field Sales/Laptop	Attachments	Must be set to Yes for Oracle Field Sales/Laptop attachments to work.	
		ASL: Enable Configurator	Field Sales/Laptop			
		ASL: Enable Encyclopedia	Field Sales/Laptop	Marketing Encyclopedia		
		ASL: Enable Selective Download	Field Sales/Laptop			
		ASO: Automatic Numbering	TeleSales			
		ASO: Default Order Category	OSO TeleSales	Collateral, events	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.	Order Capture
		ASO: Default Order Type	TeleSales	Opportunities, collateral	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form launched from the Quote/Order tab.	
		Default Login Function	Sales Online		Default login function	Null
		Default Status	TeleSales	Leads, opportunities	Default status for new tasks. Setting: all levels.	New
		FND: Message Level Threshold			Error or Success	
		HZ: Address Key Length	TeleSales	Lead import		15
		HZ: Duplicate Allowed	TeleSales			

Req.	New	Profile Name	Product	Functions	Description	Default
		HZ: Generate Party Number	TeleSales			
		HZ: Generate Party Site Number	TeleSales			
		HZ: Key Word Count	TeleSales	Lead import		5
		HZ: Postal Code Key Length	TeleSales	Lead import		5
		IBE: Use Pricelist Associated with Specialty Store	Sales Online	Quotes	Must be set to Yes for Quotes to work properly.	
	new	IEU: Queue Order: Marketing Lists	TeleSales		Determines the order of appearance for the queue.	
	new	IEU: Queue Order: My Team Leads	TeleSales		Determines the order of appearance for the queue.	
	new	IEU: Queue Order: My Team Opportunities	TeleSales		Determines the order of appearance for the queue.	
	new	IEU: Queue: Marketing Lists	TeleSales		Determines if a user can work on Non-Media Marketing Lists.	
	new	IEU: Queue: My Team Leads	TeleSales		Determines if a user can work on Leads.	
	new	IEU: Queue: My Team Opportunities	TeleSales		Determines if a user can work on Leads.	
		JTF Home Page File Name	Sales Online		Value is JSP name to use as homepage.	Null
		JTF: Default Currency	TeleSales	Leads, opportunities	Default currency for transactions. Setting: all levels	USD
		JTM: Debug Mode	Field Sales Laptop		Debug Mode On/Off for CRM Mobile Applications	
		JTM: Default Logon Responsibility for CRM Mobile Application	Field Sales Laptop		Default Logon Responsibility for CRM Mobile Application Logon	
		JTM: Post Installation Tasks Java Class Full Name for CRM Mobile Application	Field Sales Laptop		Post-installation Tasks Java Class Full Name for CRM Mobile Application	
		JTM: TimePicker Format (HH24/HH12)	Field Sales Laptop		Specifies format for Timepicker (HH24/HH12) for Oracle CRM Mobile Applications HH24 format e.g., Date + 23:50 HH12 format e.g., Date + 11:50	

Req.	New	Profile Name	Product	Functions	Description	Default
		MO: Operating Unit	Sales Online	Quotes		
		OS: Address Required for Opportunity	Sales Online	Opportunity	Address required for Opportunity	No
		OS: Address Required for Organization	Sales Online	Customer	Address required for Organization	No
		OS: Address Required for Person	Sales Online	Customer	Address required for Person	No
		OS: Address Required for Sales Lead	Sales Online	Leads	Address required for Sales Lead	No
		OS: Allow Updating Frozen Opportunities	TeleSales Sales Online	Opportunities	Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze check box selected. This profile can be set at either the responsibility or the user level. When set to *Y*, this profile option allows the user or responsibility to make changes. An *N* setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze check box is selected. This includes the Freeze check box itself.	Yes
		OS: Assign New Lead	TeleSales Sales Online	Lead	if this profile is set to No, then the application uses the Territory Manager to automatically assign the resources to the lead. The first person the Territory Manager assigns becomes the owner. The rest of the resources in the territory become sales team members on the lead. if this profile is set to Yes, then the agent must enter the owner manually using the Owner drop-down list. If the agent does not make an entry, then the lead is assigned to the default user set in OS: Default Resource ID. If no default resource is set, then application assigns ownership to the user creating or updating the lead.	No
		OS: Auto Assigning from Lead Import	Sales Online TeleSales	Lead		Yes

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Auto Qualify Lead	TeleSales Sales Online	Lead	Turns automatic qualification for sales leads on or off. A setting of Yes, causes the application to attempt to qualify a lead each time the lead is updated. A setting of No means the user must qualify the lead manually by selecting the Qualified check box. If this profile is not set, it is defaulted to 'N'	Yes
		OS: Auto Ranking from Lead Import	Sales Online	Lead		Yes
		OS: Auto-relate Lead note to Customer	Sales Online TeleSales		Relate a newly created lead note to it's party automatically. AS_NOTES_LEAD_CUSTOMER	Yes
		OS: Auto-relate Lead note to Primary Contact	Sales Online TeleSales		Relate a newly created lead note to it's primary contact automatically. AS_NOTES_LEAD_CONTACT	No
		OS: Auto-relate Opportunity note to Customer	Sales Online		Relate a newly created opportunity note to it's party automatically. AS_NOTES_OPP_CUSTOMER	Yes
		OS: Auto-relate Opportunity note to Primary Contact	Sales Online TeleSales		Relate a newly created opportunity note to it's primary contact automatically. AS_NOTES_OPP_CONTACT	No
		OS: Auto-relate Relationship note to Object	Sales Online TeleSales		Relate a newly created relationship note to it's object automatically. AS_NOTES_REL_OBJECT	Yes
		OS: Auto-relate Relationship note to Subject	Sales Online		Relate a newly created relationship note to it's subject automatically. AS_NOTES_REL_SUBJECT	Yes
		OS: Budget status required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a budget status for a lead before that lead can be qualified.	Yes
		OS: Calendar Setting Required for Assignment	Sales Online		Calendar setting required for sales lead assignment.	No
		OS: Campaign code required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a campaign code for a lead before that lead can be qualified.	Yes
Yes		OS: Compensation Sales Credit Type	TeleSales Sales Online	Opportunities	Compensation sales credit type.	

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Contact phone required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a phone number for a lead contact before that lead can be qualified.	Yes
		OS: Contact role required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a role for a lead contact before that lead can be qualified.	Yes
		OS: Create Tasks Flag	Sales Online		Flag to indicate if tasks need to be created automatically.	Yes
		OS: Customer Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons, lookups	**Full:** The user can view and update all customers. Generally, this access is given to super users only. **Prospecting:** Users can view all customers but can update customer information only if they are on the sales team. **Sales Team:** Users can view and modify customer information when they are on the sales team.	Full
		OS: Customer Sales Team Default Role Type	TeleSales Sales Online	Organizations, Persons	Assigns a role type to a new sales team member if no role is specified by the user.	Account Manage r
		OS: Daily Conversion Type	TeleSales Sales Online	Opportunities	Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types.	Corpora te
		OS: Date Mapping Type	Sales Online		Date mapping type	S
		OS: Dead Lead Status	Sales Online TeleSales	Leads	Dead lead status	DEAD_ LEAD
		OS: Decision Time Frame Required	TeleSales Sales Online		Decision time frame required	Yes
		OS: Default Address Style	Sales Online		Default address style	AS_ DEFAU LT
		OS: Default Budget Status for Leads	Sales Online TeleSales	Leads	Default budget status for leads	Pending

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Default Channel for Leads	Sales Online TeleSales	Leads	Default channel for leads	Direct
		OS: Default Close Date Days	TeleSales Sales Online	Opportunities	Sets the default close date for an opportunity. The automatic close date is the creation date plus the number of days set in this profile.	150
		OS: Default Decision Time Frame for Leads	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a time frame for a lead before that lead can be qualified.	Within a week
		OS: Default Lead Contact Role	Sales Online TeleSales	Leads	Default Lead Contact Role	END_ USER
		OS: Default Lead Scorecard	TeleSales Sales Online	Leads	Default Lead Scorecard	
		OS: Default Opportunity Sales Stage	TeleSales Sales Online	Opportunities	Default Sales Stage for new opportunity	Stage 1
		OS: Default Opportunity Status	TeleSales Sales Online	Opportunities	Default Opportunity Status for opportunity	Prelimin ary
		OS: Default Opportunity Win Probability	TeleSales Sales Online	Opportunities	The default win probability for new opportunities.	10-Prosp ecting (qualifie d)
		OS: Default Period Type	TeleSales Sales Online			
		OS: Default Period Type for Currency Conversion	TeleSales Sales Online		Default period type for currency conversion	
		OS: Default Resource ID Used for Sales Lead Assignment	TeleSales Sales Online	Leads	Sets up default resource to receive any imported leads not assigned by the territory management module.	
		OS: Default Sales Channel	TeleSales Sales Online	Opportunities	Default sales channel for new opportunities	Direct

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Default Status for Leads	Sales Online TeleSales	Leads	Default Status for Lead	New
		OS: Default Vehicle Response Code for Leads	Sales Online TeleSales	Leads	Default Vehicle Response Code for Leads	User
		OS: Default Vehicle Response Code for Opportunity	Sales Online TeleSales		Default Vehicle Response Code for Opportunity	User
		OS: Default Win/Loss Status	Sales Online		Default Win/Loss Status	None
		OS: Degree of Parallelism	Sales Online		Degree of Parallelism for concurrent program	4
		OS: Enable Customer LOV Security	Sales Online TeleSales		Setting this profile to 'Yes' restricts users to creating opportunities and leads only for those customers which they can view. Setting this profile to 'No' allows all users to create opportunities and sales leads for any customers. The users can update the opportunities and sales leads they have created.	No
		OS: Enable Real Time Opportunity and Customer Assignment	Sales Online TeleSales		Enables assignment of customers, leads, and opportunities in real time, whenever an agent updates a record. This is required for online territory assignment.	No
		OS: Execute TCA API Callouts for Mobile Sales	Sales Online		Execute TCA API Callouts for mobile sales	No
		OS: Forecast Calendar	TeleSales Sales Online	Forecasting	The name of the calendar you are using to manage your forecasts.	
Yes		OS: Forecast Sales Credit Type	TeleSales Sales Online	Forecasting		
		OS: Generate Opportunity System Notes	TeleSales Sales Online	Opportunities	Determines whether or not notes are automatically generated whenever the opportunity is modified by a user.	Yes
		OS: Interest Type Master Org_ID	Sales Online		Master org ID required for MO interest type migration script	
		OS: Inventory Category Integration	TeleSales Sales Online	Opportunities	When set to *Yes*, this system profile uses product categories from inventory for the interest types.	Yes

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Language	TeleSales			
		OS: Lead Link Status	Sales Online TeleSales	Leads	Lead Link Status	CONVE RTED_ TO_ OPPOR TUNITY
		OS: Lead Routing Status	Sales Online TeleSales	Leads	Lead Status after Routing	New (seeded value)
		OS: Manager Update Access	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	This profile option sets the level of access for sales team members with the role of TeleSales Manager to update information for their subordinates in the sales organization. This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege. This profile has three possible settings **Update data**: Update. **Inherit data**: Inherit access privilege from subordinate. **View data**: View data only.	R
		OS: Maximum Roll Days for Converting Amount	TeleSales Sales Online	Opportunities	Maximum roll days for converting currency amounts if no daily conversion rate exists.	
		OS: Move Opportunities	Sales Online	Opportunities	Move Opportunities	Open
		OS: Move Sales Leads	Sales Online	Leads	Move Sales Leads	

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Opportunity Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	**Global Full:** Users can view and update all opportunities whether they are on the sales team or not. Generally, this access is given to super users only. **Org Full** (Full by Organization)**:** Users can view and update all opportunities whether or not they are on the sales team. However, they are restricted to viewing and updating data for the HR organization they are assigned to in Oracle HRMS. **Prospecting:** Users can view all opportunities but they can make changes only when they are on the sales team. Users can create opportunities for a customer only when they are on that opportunity's sales team. **Sales Team:** Users can view opportunities only when they are on the sales team. When the opportunity creator selects the Full Access check box on the Sales Team tab for a team member, that team member can update the opportunity. Otherwise the record is view only.	Global Full
		OS: Opportunity Probability Link	TeleSales Sales Online	Opportunities	Determines whether a warning or error is given if the win probability amount does not fall within the sales stages probabilities.	Warning
		OS: Opportunity Rollup Override Flag	Sales Online TeleSales	Opportunities	Determines whether the Not Null Opportunity header fields will be updated during rollup.	Yes
		OS: Opportunity Sales Credit Enforce Sales Team Definition	TeleSales Sales Online	Opportunities	If set to *Yes*, only people on the sales team are allowed to receive sales credit. A sales representative cannot be removed from a sales team if the sales representative has sales credit on the opportunity.	Yes
		OS: Opportunity Sales Team Default Role Type	Sales Online	Opportunity Sales Teams	Opportunity Sales Team Default Role Type	
		OS: Preferred Reporting Currency	TeleSales Sales Online	Opportunities	Preferred currency for denorm programs.	US Dollar
		OS: Privilege to Change Lead Owner	Sales Online TeleSales	Lead	User having this privilege can change the owner of a lead to which he/she has update access. User who does not have this privilege can change owner of only those leads that they own.	No

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Project name required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a project name for a lead before that lead can be qualified.	Yes
		OS: Rank Lead	Sales Online TeleSales	Leads	Rank lead	System
		OS: Sales Admin Update Access	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	An employee with the TeleSales Administrator role (as defined in the Resource Manager) can access the same records as the manager of the group they are assigned to. Groups are also set up in Resource Manager. The access can be of three types: **Update data**: The administrator can update the same data as the manager of the group. **Inherit data**: Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates. **View Data**: Administrators can only view the data created by the manager's subordinates.	R
		OS: Sales channel required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a sales channel for a lead before that lead can be qualified.	Y
		OS: Sales Lead Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons	Controls the level of access to leads. The available settings are: **Full**: Employees can view and modify all leads, even those not assigned to them. **Sales Team**: Only the employee who has been assigned the lead can view and modify it. **Prospecting**: Employees can view all leads but cannot update any.	Full
		OS: Sales Lead Aging Abandon-Action	Sales Online TeleSales	Leads	Sales Lead Aging Abandon-Action	Abando n
		OS: Sales Lead Aging Days to Abandon	Sales Online TeleSales	Leads	Sales Lead Aging Days to Abandon	1

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Sales Lead Aging No Action	Sales Online TeleSales	Leads	Sales Lead Aging No Action	1
		OS: Sales Lead Aging No Action-Action	Sales Online TeleSales	Leads	Sales Lead Aging No Action-Action	Abandon
		OS: Sales Methodology	TeleSales Sales Online	Opportunities	Sales methodology	1
		OS: Sales Team Creator Keep Flag	TeleSales Sales Online	Opportunities	Default keep flag for sales team creator.	Yes
		OS: Source Code Mandatory for Leads	Sales Online TeleSales	Lead	Source Code mandatory for leads	No
		OS: Source Code Required for Opportunity	Sales Online	Opportunities	Source Code Required for Opportunity	No
		OS: Territory Minimum Number of Records for Parallel Processing	Sales Online TeleSales		Minimum Number of Records for Parallel Processing	100
		OS: Territory Number of Child Processes	Sales Online TeleSales		Number of Child Processes	1
		OS: Territory Records to Open for Processing Changed Accounts	Sales Online TeleSales		The number of records to process per open cursor period, for processing changed accounts	10000
		OS: Total budget amount required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter the total budget amount for a lead before that lead can be qualified.	Yes
		OS: Use Forecast Materialized View	Sales Online	Forecasting	Determines whether or not to use materialized views to get pipeline data for forecast.	No
		OS: View Competitor Party Detail	Sales Online		View Competitor Party Detail	Yes
		OS: View Partner Party Detail	Sales Online		View Partner Party Detail	Yes
		OSO: Application Utility Class	Sales Online		Class name of AppUtility Class (e.g., oracle.apps.asf.util.OsoAppUtility)	

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Debug Messages On	Sales Online		Setting to display or hide debugging messages.	No
		OSO: Default Account Site Use	Sales Online		Default Account Site Use	BILL_ TO
		OSO: Default Address Lines	Sales Online		Default Address Lines	2
		OSO: Default Address Type	Sales Online		Default Address Type	MARKE T
		OSO: Default Country	Sales Online		Default Country	US
		OSO: Default Customer Category	Sales Online		Default Customer Category	CUSTO MER
		OSO: Default for Show Quick Task	Sales Online		Default for Show Quick Task	No
	Yes	OSO: Default Forecast Category	Sales Online	Forecasting	Setting to determine the default forecast category used when forecasting.	1
		OSO: Default Forecast Currency	Sales Online	Forecasting	Setting to determine the default forecast currency used for forecasting.	USD
		OSO: Default Forecast Period Type	Sales Online	Forecasting	Default Forecast Period Type	
		OSO: Default Forecast Worksheet Lines	Sales Online	Forecasting	Setting to determine what values should be used for defaults in the forecast worksheets, zero or pipeline.	Pipeline
		OSO: Default home page msg ID	Sales Online	home page	File ID for home page message	
		OSO: Default Lead Contact Role Type	Sales Online	Leads	Default Lead Contact Role Type	END_ USER
		OSO: Default Lead Contact Title	Sales Online	Leads	Default Lead Contact Title	MS
		OSO: Default Link Type	Sales Online		Default Link Type	URL
		OSO: Default Number of Days to Filter Interactions	Sales Online		Default Number of Days to Filter Interactions	180
		OSO: Default Organization Phone Type	Sales Online		Default Organization Phone Type	GEN
		OSO: Default Organization Relationship	Sales Online		Sales Online default Organization relationship	EMPLO YER_OF
		OSO: Default Person Phone Type	Sales Online		Default Person Phone Type	GEN

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Default Person Relationship	Sales Online		Default Person Relationship	EMPLOYEE_OF
		OSO: Default Preferred Language	Sales Online		Default Preferred Language	US
		OSO: Default Sales Compensation Period Type	Sales Online		Default Sales Compensation Period Type	
		OSO: Default Sales Group and Role	Sales Online		Default Sales Group and Role	
		OSO: Default Value for End of Day	Sales Online		Default Value for End of Day	17
		OSO: Default Value for Start of Day	Sales Online		Default Value for Start of Day	9
		OSO: Default Weekday to Begin With	Sales Online		Default Weekday to Begin With	2
		OSO: Default Weekday to End With	Sales Online		Default Weekday to End With	6
		OSO: Define Column On	Sales Online		To turn on / off the column define feature.	Null
		OSO: Disable Page Level Security	Sales Online		Disable Page Level Security	No
		OSO: Display Bubble Train	Sales Online		Display Bubble Train	Yes
		OSO: Display Opportunity Competitors in Detail	Sales Online		Display Opportunity Competitors in Detail	No
		OSO: Display Opportunity Worksheet Grand Totals	Sales Online	Forecasting	Setting to determine whether grand totals should be displayed for the opportunity worksheet	No
		OSO: Display Subordinate Current Pipeline	Sales Online	Forecasting	Setting to determine whether subordinate current pipeline should be displayed.	Yes
		OSO: Display Tracking Information	Sales Online	Controls indicators	Flag to display tracking information. Works in conjunction with OSO: Record View Tracking Max Period and OSO: Record View Tracking Period to control the star (new record) and circle (updated by another user) indicators on summary pages.	Yes
		OSO: Enable Lead Share	Sales Online		Enable lead share	No

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Enable Product Category in Opportunity Advanced Search	Sales Online		Enable product category in opportunity advanced search	No
		OSO: Enable Quote	Sales Online		Enables quotes	No
		OSO: Enable Record Count in Tables	Sales Online		Enables record count in tables	No
		OSO: Forecast Autosubmit Worksheets	Sales Online	Forecasting	Setting to determine which worksheets are automatically submitted with submitting a forecast.	None
		OSO: Forecast Calendar Month	Sales Online	Forecasting	Setting to determine the number of calendar months you can move forward or backwards when viewing.	6
		OSO: Forecast Max Generate Months	Sales Online	Forecasting	Maximum number of months generated when generating multiple forecasts.	6
		OSO: Home Page Timeout	Sales Online	home page	Time used to retrieve bin data on home page.	5000
		OSO: Lead Share Application ID	Sales Online	Leads	Lead Share Application ID	
		OSO: Lead Share Company Code	Sales Online	Leads	Lead Share Company Code	
		OSO: Lead Share Default Org Text	Sales Online	Leads	Lead Share Default Org Text	
		OSO: Lead Share Host Name	Sales Online	Leads	Lead Share Host Name	
		OSO: Lead Share LETS Server	Sales Online	Leads	Lead Share LETS Server	
		OSO: Lead Share Partner ID	Sales Online	Leads	Lead Share Partner ID	
		OSO: Lead Share Port Number	Sales Online	Leads	Lead Share Port Number	
		OSO: Lead Share Proxy Host	Sales Online	Leads	Lead Share Proxy Host	
		OSO: Lead Share Proxy Port	Sales Online	Leads	Lead Share Proxy Port	
		OSO: Lead Share Responsibility ID	Sales Online	Leads	Lead Share Resp ID	
		OSO: Lead Share Salesforce ID	Sales Online	Leads	Lead Share Salesforce ID	
		OSO: Lead Share User ID	Sales Online	Leads	Lead Share User ID	

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Max Attachment Size	Sales Online		Maximum allowable attachment size in bytes.	100000
		OSO: Max Chart Legends	Sales Online		Maximum number of legends in a chart.	20
		OSO: Max Legend Label Length	Sales Online		Maximum number of characters in chart legend labels.	22
		OSO: Min Rows Top Navigate	Sales Online		Minimum number of rows on a table that will enable top and bottom navigate links.	20
		OSO: Minimum Search String Length	Sales Online		Minimum number of characters required for any search from a text field.	4
		OSO: Number of News Headlines	Sales Online		Number of news headlines	5
		OSO: Number of Rows for Fetch	Sales Online		Number of rows to be fetched. For internal use only.	1000
		OSO: Opportunity Detail Security Check	Sales Online		Opportunity detail security check	Yes
		OSO: Opportunity Variance Bin Reports Aging Days	Sales Online		Aging days value to be used in Opportunity Variance Aging Opportunities Bin report.	365
		OSO: Opportunity Variance Bin Reports Amount	Sales Online		Amount to be used in Opportunity Variance Aging Opportunities Bin Report.	100000
		OSO: Opportunity Variance Bin Reports Number of Days	Sales Online		Number of days to be used in Opportunity Variance Bin Reports as Time Range in Queries	7
		OSO: Opportunity Variance Bin Reports Win Probability	Sales Online		Win Probability values to be used in Opportunity Variance Bin Reports as query criteria.	20
		OSO: Oracle Internal	Sales Online		Is this installation Oracle Internal?	No
		OSO: Organization Detail Security Check	Sales Online		Organization Detail Security Check	Yes
		OSO: Original System Reference URL	Sales Online			URL
		OSO: Performance Warning	Sales Online		Performance Warning	
		OSO: Person Detail Security Check	Sales Online		Person Detail Security Check	
		OSO: Person Original System Reference URL	Sales Online		Person Original System Reference URL	

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Projects Integrated	Sales Online		Whether Projects application is installed and should be integrated with Sales Online.	No
		OSO: Quick Find On	Sales Online		Profile to render Quick Search	
		OSO: Quick Find Security Check	Sales Online		Quick Find Security Check	
		OSO: Record View Tracking Max Period	Sales Online	Controls indicators	Works in conjunction with OSO: Display Tracking Information and OSO: Record View Tracking Period to control the star (new record) and circle (updated by another user) indicators on summary pages.	14
		OSO: Record View Tracking Period	Sales Online	Controls indicators	Record view tracking period must be a value less than ASF_RECORD_VIEW_PERIOD. Works in conjunction with OSO: Record View Tracking Max Period and OSO: Display Tracking Information to control the star (new record) and circle (updated by another user) indicators on summary pages.	14
		OSO: Relationship Original System Reference URL	Sales Online		Relationship Original System Reference URL	
		OSO: Resultset Cache On	Sales Online		This should be turned off if translated values are not seen in tables.	No
		OSO: Search Lead Wildcard	Sales Online		This profile determines if the % character can be the first character in search sent to list of values.	No
		OSO: SQL Trace On	Sales Online		SQL trace on	No
		OSO: Subordinate Current Pipeline	Sales Online		Display subordinate current pipeline	Yes
		OSO: Wireless User Device	Sales Online Wireless		Wireless device used by the user	PHONE
		OTS: Advanced Inbound Installation	TeleSales	Universal Work Queue	Set to *Yes* if Advanced Inbound has been installed.	Yes
		OTS: Advanced Outbound Installation	TeleSales	Universal Work Queue	Set to *Yes* if Advanced Outbound has been installed.	Yes
		OTS: Amount Scaling Factor	TeleSales		To display the amount field	

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: ANI with No Area Code	TeleSales		Used to match the Telephony Caller ID with Customer Telephone Number	
		OTS: Associate Relationship Location To Organization	TeleSales	Addresses	A setting of Yes, causes any address you enter for a contact at an organization (party of type party relationship) automatically to become an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. A setting of No turns this feature off.	Yes
		OTS: Contact Role	TeleSales	Organizations, Persons	Sets the default contact role for an organizational contact.	Contact
		OTS: Create Order for Event	TeleSales		Creates an order for an event.	No
		OTS: Default Collateral Reply to Email Address	TeleSales	Event confirmation letter	Enter the email address you want collateral recipients to use when replying collateral confirmation emails.	
		OTS: Default Collateral Subject Line	TeleSales	Collateral		
		OTS: Default Collateral Subject Line	TeleSales	Event confirmation letter	Enter the subject line for the collateral confirmation email.	
		OTS: Default Country	TeleSales Sales Online	Organizations, Persons	Sets the default country used for address creation.	US
	new	OTS: Default Cover Letter for Collateral Requests	TeleSales	Collateral	Used to populate the cover letter item once a collateral is selected from the list of values.	
		OTS: Default Event Reply to Email Address	TeleSales	Event confirmation letter	Enter the email address you want event enrollees to use for replying to enrollment confirmation emails.	
		OTS: Default Event Subject Line	TeleSales	Event confirmation letter	Enter the subject line for the enrollment confirmation email.	
	new	OTS: Default Note Type	TeleSales		Default type for a new note	AS_ USER
		OTS: Default Party Type	TeleSales	Organizations, Persons	Sets the default party type for the eBusiness Center header. Available values are: Person Organization Party Relationship	PARTY_ RELATI ONSHIP

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: Default Person Title	TeleSales	Organizations, Persons	Sets the default title for a person in the eBusiness Center header.	
		OTS: Default Phone Line Type	TeleSales	Organizations, Persons	The default phone type for the eBusiness Center header.	GEN
		OTS: Default Relationship	TeleSales	Organizations, Persons	The default relationship between parties.	CONTACT_OF
	new	OTS: Default Shipping Method for Electronic Collateral	TeleSales	Collateral	Defines the shipping method for electronic collateral.	EMAIL
	new	OTS: Default Shipping Method for Physical Collateral	TeleSales	Collateral	Defines the default shipping method for physical collateral.	
		OTS: Default Site Usage	TeleSales	Organizations, Persons	The default type for the address in the eBusiness Center header. For example: Bill to, Ship to.	
	new	OTS: Default Tab in eBusiness Center	TeleSales	eBusiness Center	Determines which tab is active when the user launches the Oracle TeleSales eBusiness Center	AST_EBC_INT
	new	OTS: Default Tab in Opportunity Center	TeleSales		Determines which tab is active when the user launches the Opportunity Center	AST_OPC_PRI
	new	OTS: Default Tab in Sales Lead Center	TeleSales	eBusiness Center	Determines which tab is active when the user launches the Oracle TeleSales Lead Center	AST_SLC_PUR
		OTS: Default Task Status	TeleSales		Default Task Status	15
	new	OTS: Default Universal Search Tab	TeleSales		Default Universal Search Tab	Quick Search
	new	OTS: Default Universal Search Type	TeleSales		Default Universal Search Type	Organization
		OTS: Default User Role and Sales Group	TeleSales	Selection of role and group	Entering a default user role and group in this profile means that the user no longer has to choose a role and group each time they launch the eBusiness Center. You need not set a default for a user that has only one role and group.	
		OTS: Display Customer Profile	TeleSales	eBusiness Center	A setting of *Yes* enables the customer profile area of the eBusiness Center. A setting of *No* means the fields are disabled.	No
	new	OTS: Dump UWQ Params	TeleSales		Setting this profile will dump the parameters from UWQ to TeleSales into the log file.	Yes
		OTS: Enable Address Validation	TeleSales	Organizations, Persons	A setting of *Yes* turns on address validation.	No

Req.	New	Profile Name	Product	Functions	Description	Default
	new	OTS: Enable Customer Standard Navigation	TeleSales		To enable or disable navigation to Customer Standard from the eBusiness Center.	Yes
		OTS: Enable SQL Tracing	TeleSales		To enable or disable SQL tracing	No
		OTS: Generate Collateral Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of collateral activities such as sending out collateral.	No
		OTS: Generate Customer Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to customer records.	No
		OTS: Generate Event Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to events.	No
		OTS: Generate Lead Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to leads.	No
		OTS: Generate Opportunity Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to opportunities.	No
		OTS: Hang Up on End	TeleSales		Hang up the telephone at the end of the interaction.	
		OTS: Identifying Address	TeleSales	Organizations, Persons	A *Yes* setting sets the address displayed in the header to be the identifying (primary) address for the party.	
	new	OTS: Interaction Auto Wrap-up Enabled	TeleSales		If set to Yes, interaction will be wrapped up automatically without showing the wrap-up window.	
	new	OTS: Interaction Default Action	TeleSales		Interaction Default Action	
	new	OTS: Interaction Default Action Item	TeleSales		Interaction Default Action Item	
	new	OTS: Interaction Default Outcome	TeleSales		Interaction Default Outcome	
	new	OTS: Interactions-Record Media Item ID	TeleSales		Setting this profile will not Record Media Item during interaction.	
	new	OTS: Interactions-Start On Query	TeleSales		When interaction is enabled, setting this profile to Yes will start an interaction when a record is queried up.	
	new	OTS: JSP Details from OTS	TeleSales		Allow JSP Details from OTS	
		OTS: Lookup Export Directory Path	TeleSales		Lookup Export Directory Path	/home/

Req.	New	Profile Name	Product	Functions	Description	Default
	new	OTS: Match DNIS FOR Campaign	TeleSales		Setting this profile will enable the TeleSales Universal Work Queue to search campaigns by DNIS.	No
		OTS: Max Interactions Displayed	TeleSales	eBusiness Center	Determines how many interactions to display in the overview tab.	10
		OTS: Minimum Number of Characters for Lookup	TeleSales	All searches	Improves search performance by forcing agents to use a minimum number of characters for their searches.	None
		OTS: No Media Item Interaction	TeleSales		Setting this profile will not record media item during interactions.	
		OTS: Notes Interaction Activity	TeleSales	Interactions	If you wish to track activities for notes, then set this profile option to *Yes*.	
	new	OTS: Number of Months to view Notes and Interactions for	TeleSales		Default value for months of notes/interactions to view	
		OTS: Order Source Code	TeleSales		To order collateral through order capture, this collateral source code is used.	1
		OTS: Primary Contact Role Flag	TeleSales	Organizations, Persons	Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window.	Y
		OTS: Queue Order: Forecasts	TeleSales		Determines the order of appearance for the queue.	
		OTS: Queue Order: Leads	TeleSales		Determines the order of appearance for the queue.	
		OTS: Queue Order: Opportunities	TeleSales		Determines the order of appearance for the queue.	
	new	OTS: Queue Order: Quotes	TeleSales		Determines the order of appearance for the queue.	
	new	OTS: Script Launch on Interaction	TeleSales		Script Launch on Interaction	
	new	OTS: Script Launch on UWQ Delivery	TeleSales		Script Launch on UWQ Delivery	
		OTS: Scripting Installation	TeleSales	Universal Work Queue	Set to *Yes* if scripting has been installed for TeleSales.	
	new	OTS: Show Campaign and Offer Names Instead of Codes	TeleSales		If set to yes, shows the campaign and offer name instead of code.	
	new	OTS: TeleSales Interaction Enabled	TeleSales	Interactions	If set to Yes, TeleSales records interactions after the interaction is started.	No

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: TeleSales Interactions on Query Enabled	TeleSales	Interactions	If set to Yes, will begin an interaction once the record is queried up.	
	new	OTS: UWQ Default Source Code	TeleSales		Source Code to be used during Advanced Inbound Screen Pop	
		Start Menu In Quick Menu	TeleSales	eBusiness Center	Set the value to `TeleSales Quick Menu` to enable the Quick Menu for TeleSales. All applications using Quick Menu share this profile option.	
		Task Manager: Default Priority	TeleSales			
		Task Manager: Default Task Status	TeleSales			
		Task Manager: Default Task Type	TeleSales			

B

Lookups

This appendix provides a table the lookups used by the Oracle Sales Family of eBusiness Suite applications. It includes lookups with three different levels of modification:

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

For information about viewing and modifying lookups, please refer to the *Oracle Applications System Administrator's Guide*.

B.1 Table of Lookups

The following table lists lookups for the Sales Family of eBusiness Suite applications, their values or defaults, the areas they affect, and the access level.

App.	Lookup Type	Values	Affects	Level
	ASF_CHART_SERIES_COUNT		Number of series to show in a chart.	U
	ASF_CHART_VALUE_TYPES		Value type for Y axis in charts (Count/Amount).	U
	ASF_MODULE_FUNCTION_ATTR		Lookup for default login page features.	U
	BUDGET_STATUS	APPROVED (Approved0 NOT_APPROVED (Not approved) PENDING (Pending)	Leads budget status	
	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Leads close reason	
	DECISION_TIMEFRAME	1-3 MONTHS 3-6 MONTHS 6-12 MONTHS MORE THAN 1 YEAR WITHIN 1 MONTH WITHIN 1 WEEK	Leads time frame	
	LEAD_CONTACT_ROLE	DECISION_MAKER (Decision maker) END_USER (End user)	Leads contact role	
	LINK_TYPE		Lookup for tools administration page.	

App.	Lookup Type	Values	Affects	Level
	PARTY_RELATIONS_TYPE	BENEFACTOR_OF (Benefactor of) BOARD_MEMBER_OF (Board member of) CONTACT_OF (Contact of) CUSTOMER_OF (Customer of) EMPLOYEE_OF (Employee of) STOCK_HOLDER_OF (Stock holder of)	Leads relationship type	

App.	Lookup Type	Values	Affects	Level
	PARTY_RELATIONS_TYPE (continued)	MEMBER_OF (Member)		
		MOTHER_OF (Mother)		
		OWNED_BY (Owned)		
		PARENT_OF (Parent)		
		PARTNER_OF (Partner)		
		PAYFROM_OF (Alternate party to pay for a buyer)		
		PAYTO_OF (Alternate payee name for the seller)		
		PUBLISHER (Publisher)		
		REFERENCE_FOR (Reference)		
		_OF (Relative)		
		REPAIR_DEPOT_PROVIDER_FOR (Repair depot provider)		
		REPORTS_TO (Reports to)		
		SELLER_FOR (Seller)		
		SELLER_TO (Seller to)		
		SHIPTO_OF (Alternate shipping party for the buyer)		
		SIBLING_OF (Sibling)		
		SISTER_OF (Sister)		
		SON_OF (Son)		
		SPOUSE_OF (Spouse)		
		STOCK_HOLDER_OF (Stockholder)		
		STUDENT_OF (Student)		
		SUBSIDIARY_OF (Subsidiary)		
		THIRD_PARTY_OF (Third party)		
		UNCLE_OF (Uncle)		
		VAD_OF (VAD of)		
		VAR_OF (VAR of)		
		VENDOR_OF (Vendor)		

App.	Lookup Type	Values	Affects	Level
	RANK_ID	1 (Cold lead) 2 (Low lead) 3 (Medium lead) 4 (Hot lead)	Lead rank	
	REJECT_REASON _CODE	ASSIGN_ERROR (Assign error) DUPLICATE (Duplicate) VACATION (Vacation)	Leads decline reason	
	SALES_CHANNEL	DIRECT (Direct) INDIRECT (Indirect)	Sales Channel	S
	STATUS_CODE	NEW (new) UNQUALIFIED (unqualified) QUALIFIED (qualified) ACCEPTED (accepted) LOSS (loss) DEAD_LEAD (dead lead) DECLINED (declined) CONVERTED_TO_OPPORTUNITY (lead converted to opportunity0	Lead status	
	VEHICLE_RESPONSE_CODE	EMAIL FAX LETTER PHONE USER VOICE_MESSAGES WEB	Lead response channel	
	RELATIONSHIP_TYPE	ALL (seeded value)	Accounts	
	TAX_CODE		Accounts	
	PAYMENT_TERM		Accounts	
AMS	AMS_EVENT_PAYMENT_ STATUS		Events	

App.	Lookup Type	Values	Affects	Level
AR	ACCOUNT_STATUS		Accounts	
AR	ACCT_ROLE_TYPE		Accounts	
AR	ADDRESS_LABEL		eBusiness Center	
AR	CODE_STATUS		Persons, organizations, Accounts	
AR	COMMUNICATION_TYPE		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE	ADMINISTRATIVE_CONTACT_FOR (Administrative Contact For)	Persons, organizations	E
		BILL_PRESENTMENT_ADMIN (Bill Presentment System Administrator)		
		BILL_PRESENTMENT_CSR (Bill Presentment System Customer Service Representative)		
		BILL_PRESENTMENT_ORG_REP (Bill Presentment System Organization Representative)		
		BILL_PRESENTMENT_SITE_ADMIN (Bill Presentment System Site Administrator)		
		BILL_TO (Bill To)		
		BUYING_CONTACT_FOR (Buying Contact For)		
		CEO_OF (CEO)		
		CFO_OF (CFO)		
		CIO_OF (CIO)		
		CONTACT (Contact)		
		CORR (Correspondence)		
		DEPT_HEAD (Department Head)		
		DUN (Dunning)		
		EXECUTIVE (Executive)		
		KEY_DECISION_MAKER_FOR (Key Decision Maker)		
		LEGAL (Legal)		
		LEGAL_CONTACT_FOR (Legal Contact For)		

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE (continued)	MARKET (Market) MIDDLE_MANAGER (Middle Manager) PRIMARY_CONTACT_FOR (Primary Contact For) RECEIVING_CONTACT_FOR (Receiving Contact For) SHIPPING_CONTACT_FOR (Shipping Contact For) SHIP_TO (Ship To) STMTS (Statement) STOCK_HOLDER_OF (Stock Holder) TECHNICAL_CONTACT_FOR (Technical Contact For)		
AR	CONTACT_TITLE	DR (Dr.) MISS (Miss) MR (Mr.) MRS (Mrs.) MS (Ms.) SIR (Sir)	Persons, organizations	E
AR	CONTACT_TYPE		Persons, organizations, events, collateral	
AR	COUNTRY		eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting	
AR	CREDIT_RATING		Persons, Organizations	
AR	CUSTOMER_CATEGORY	CUSTOMER (Customer) PROSPECT (Prospect)	Accounts. persons, organizations	E

App.	Lookup Type	Values	Affects	Level
AR	CUSTOMER_TYPE		eBusiness Center	
AR	DAY		eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue	
AR	DECISION_FACTOR_TYPE		Accounts, Opportunity Contacts	
AR	DECISION_PRIORITY_TYPE		Accounts	

App.	Lookup Type	Values	Affects	Level
AR	DEPARTMENT_TYPE	ACCOUNTING ADMINISTRATION CUSTOMER SERVICE DISTRIBUTION / LOGISTICS ENGINEERING FACILITIES HUMAN RESOURCES INFORMATION TECHNOLOGY LEGAL MANUFACTURING MARKETING MERCHANDISING OPERATIONS PURCHASING QUALITY ASSURANCE R&D (Research & Development) RISK ANALYSIS SALES TRAINING	Persons, organizations, lookup	U
AR	FOLLOW_UP		Opportunities, Universal Work Queue	
AR	FORM_NAME		eBusiness Center, persons, organizations, leads, quotes / orders, Universal Work Queue	

App.	Lookup Type	Values	Affects	Level
AR	INTEREST_TYPE	ENTERTAINMENT HOBBIES PREFERENCES SPORTS TRAITS	Leads, opportunities, lookup	E
AR	JOB_TITLE_CODE		Persons, Organizations	
AR	LANGUAGE	ENG (English) FRE (French) GER (German) ITA (Italian) SPA (Spanish)	Persons, organizations, opportunities, events, lookup, scripting	E
AR	MONTH		Lookup	
AR	NOTE_TYPE		eBusiness Center, leads, opportunities, events	
AR	OWNER_TABLE_NAME		Persons, organizations, opportunities, lookup	

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE	ADVERTISER (Advertiser)	Persons, Organizations	
		AFFILIATE_TO (Affiliate)		
		AGREEMENT_SIGNER_OF (Party that signs agreement on behalf of another party)		
		ASSOCIATE_OF (Associate of)		
		AUNT (Aunt)		
		BENEFACTOR_OF (Benefactor of)		
		BENEFICIARY (Beneficiary)		
		BILLER_AT (When an organization is registered biller)		
		BILLER_FOR (Biller For)		
		BILLTO_OF (Alternate billing party for the buyer)		
		BILL_CONSOLIDATOR_AT (Bill consolidator at)		
		BILL_CONSOLIDATOR_FOR (Bill Consolidator for)		
		BILL_PRESENTER_FOR (Bill Presenter at)		
		BILL_PUBLISHER_AT (Bill publisher at)		
		BILL_PUBLISHER_FOR (Bill publisher for)		
		BOARD_MEMBER_OF (Board Member)		
		BROTHER_OF (Brother)		
		BUSINESS_PARTNER_FOR (Business partner		
		CEO_OF (CEO)		
		CFO_OF (CFO)		
		CHANNEL_FOR (Channel)		
		CHILD_OF (child of)		
		CIO (CIO)		
		COMPETITOR_OF (Competitor)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE (continued)	CONSULTANT_FOR (Consultant)		
		CONTACT_OF (Contact)		
		CONTAINS_MEMBER (Contains member)		
		COUSIN_OF (Cousin)		
		CUSTOMER_OF (Customer)		
		DAUGHTER_OF (Daughter)		
		DEPENDENT_OF (Dependent)		
		DIVISION_OF		
		DOMESTIC_PARTNER_OF (Domestic Partner)		
		DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of)		
		DOMESTIC_ULTIMATE_OF (Domestic Ultimate of)		
		EMPLOYEE_OF (Employee)		
		EMPLOYER_OF (Employer)		
		FATHER_OF (Father of)		
		FIELD_SERVICE_PROVIDER_FOR (Field Service provider)		
		GENERAL_EMPLOYEE_OF (General Employee)		
		GLOBAL_SUBSIDIARY_OF (Global subsidiary of)		
		GLOBAL_ULTIMATE_OF (Global Ultimate of)		
		GUARANTOR_FOR (Guarantor)		
		GUARDIAN_OF (Guardian)		
		HEADQUARTERS_OF (Headquarters of)		
		KEY_DECISION_MAKER_FOR (Key decision maker)		
		LEGAL_COUNSEL_FOR (Legal counsel for)		
		MANAGER_OF (Manager_of)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE	ACK (Acknowledgments)	Persons, Organizations	
		ADMINISTERED_BY (Administered By)		
		BILL_TO (Bill To)		
		BOL (Bills of Lading)		
		BUSINESS (Business)		
		CM (Credit Memos)		
		COLLATERAL_MAIL_TO (Collateral Mail To)		
		CORR (Correspondence)		
		CUSTOMER_REGION (Customer Region)		
		DELIVER_TO (Deliver To)		
		DRAWEE (Drawee)		
		DUN (Dunning)		
		GENERAL_MAIL_TO (General Mail)		
		HEADQUARTERS_FOR (Headquarters for)		
		HOME (Home)		
		INCORPORATED_TO (Incorporated)		
		INSTALL_AT (Install At)		
		INV (Invoice)		
		ISSUED_BY (Issued By)		
		KEY_SITE (Key Site)		
		LEGAL (Legal)		
		LEGAL_ADDRESS_OF (Legal Address)		
		LEGAL_RESIDENCE_OF (Legal Residence)		
		MARKET (Market)		
		MARK_FOR (Mark For)		
		NOT_ALLOWED_INTO (Not Allowed Into)		
		OFFER_TO (Offer to)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE	OTHER (Other)		
	(continued)	PAYMENT_WILL_BE_MADE_BY (Be Made By)		
		PAY_TO (Pay To)		
		REPLY_TO (Reply To)		
		REPORT_TO (Report To)		
		RESIDES_AT (Resides At)		
		SHIP_FROM (Ship From)		
		SHIP TO (SHIP_TO)		
		SOLD_TO (Sold To)		
		STMTS (Statements)		
		STORE (Store)		
		SUPPORT_SITE (Support Site)		
		WORKS_AT (Works At)		
		WORK_PERFORMED_AT (Work Performed At)		
AR	PARTY_TYPE		eBusiness Center, persons, organizations, accounts, leads, opportunities, quotes/orders, events, collateral	
AR	PAYMENT_TYPE		Events	

App.	Lookup Type	Values	Affects	Level
AR	PHONE_LINE_TYPE	FAX (Fax) GEN (General) IW (Inbound watts) OW (Outbound watts) VM (Voice mail) ASSISTANT (Assistant) HOME (Home0 MOBILE (Mobile) OFFICE (Office) PAGER (Pager)	Persons, organizations, opportunities	E
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	RESPONSIBILITY	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Recievable Supervisor) CFO (Chief Financial Officer) COLCT (Collections) COLCTSUP (Collections Supervisor) CONTRLR (Controller) GLC (General Ledger Clerk) GLS (General Ledger Supervisor0 SOC (Sales Operation Clerk) SOS (Sales Operations Supervisor) TRSUR (Treasurer)	Persons, organizations, Universal Work Queue	E
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	ACCESS_PRIVILEGE	F (Full unrestricted access) P (Prospecting Access) T. (Sales Team Access)	Access privilege for employee	S

App.	Lookup Type	Values	Affects	Level
AS	ASTATA_RUN_MODE	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)	Run mode for Territory Assignment concurrent program	S
AS	AUTO_ASSIGNMENT_TYPE	Both None PRM TAP	Automatic assignment type	S
AS	BUDGET_AMOUNT		Leads, lookup	
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Opportunity close reason	E
AS	CONTACT_RANK_ON OPPORTUNITY	DECISION_MAKER END_USER	Opportunity contact rank	U
AS	DECISION_TIMEFRAME		Leads	
AS	FLAG	N (No) Y (Yes)	Flag	S
AS	INTEREST USE	COMPANY_CLASSIFICATION (Customer Classification) CONTACT_INTEREST (Contact Interest) LEAD_CLASSIFICATION (Lead or Opportunity Classification)	Interest use	S
AS	INTEREST_USE		Opportunities	

App.	Lookup Type	Values	Affects	Level
AS	ISSUE		eBusiness Center, leads, opportunities	
AS	LEAD_CONTACT_ROLE		Leads	
AS	LEAD_SOURCE		Leads, opportunities	
AS	MC_DATE_MAPPING_TYPE	E (End date of a period) S (Start date of a period)	Date mapping type	U
AS	METHODOLOGY_TYPE	OOP (Object Oriented)	Opportunity methodology type	E
AS	OPP_ACCESS_PRIVILEGE	F (Full Unrestricted Access) O (Full Access by Operating Unit) P (Prospecting Access) T (Sales Team Access)	Opportunity access privilege	S
AS	OPP_PROBABILITY_LINK	Error (New value is not acceptable) Warning (Warn user about error)	Opportunity probability links	S
AS	PLAN_ELEMENT_MAPPING	PCODE (Map quota to primary interest code) SCODE (Map quota to secondary interest code TYPE (Map quota to interest type)	Sales categories mapping with sales quotas (Oracle Incentive Compensation)	S
AS	PRM_LEAD_TYPE		Opportunities	
AS	REJECT_REASON_CODE	ASSIGN_ERROR DUPLICATE VACATION	Leads	
AS	ROLE_TYPE		Persons, Organizations, accounts, lookup	
AS	ROLE_TYPE	AM (Account Manager) PS (Product Specialist)	Role type	U

App.	Lookup Type	Values	Affects	Level
AS	SALESFORCE_RELATIONSHIP		Opportunities	
AS	SCD_REFRESH_MODE	1 (Complete refresh) 2 (Incremental refresh)	Sales Credit Denorm refresh mode	U
AS	SCD_RUN_MODE	1 (Complete) 2 (Update)	Sales Credit Denorm run mode	E
AS	UPDATE_ACCESS		eBusiness Center	
AS	UPDATE_ACCESS	I (Inherit data) R (View data) U (Update subordinate's data)	Update access	S
AS	VEHICLE_RESPONSE_CODE		Leads	
AS	VEHICLE_RESPONSE_CODE		Opportunities	
AS	VEHICLE_RESPONSE_CODE		Lookup	
ASO	ASO_ITEM_TYPE		Accounts	

App.	Lookup Type	Values	Affects	Level
ASO	ASO_QUOTE_RELATED_ OBJECTS		Quotes/Orders	
JTF	ACTION_TYPE	ADD ANSWER CREATE_FSR DEL INQ INTERACT RECONCILE SENT TRANSFER UPD UPDATE_FSR UPSELL WAIT XSELL	Events, Universal Work Queue	
JTF	ROLE_TYPE		Sales Team	

Table B–1

C

Concurrent Programs

This appendix provides a table of all of the concurrent programs used by the Oracle Sales Family of eBusiness Suite applications. Each concurrent program in this table is also described in the implementation step where it is set.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)

C.1 Running Concurrent Programs

The procedure for running concurrent programs is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide.*

C.2 Table of Concurrent Programs

The following table lists by name and in alphabetical order the concurrent programs used by the Oracle Sales Family of eBusiness Suite applications. The table includes the following columns from left to right:

- **Mandatory:** Is the program mandatory for the function?
- **Concurrent Program Name:** Name of the concurrent program.
- **Description:** Explains what the concurrent program does.

Mandatory	Concurrent Program Name	Description
No	Assign Territory Accesses	This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting two profile options: OS: Territory Minimum Number of Records for Parallel Processing OS: Territory Number of Child Processes Run this program after completing the setups in Setting Up Territory Management, and after the JTF Concurrent program "Generate Territory Package" has run.
No	Autocreate Opportunity from Sales lead	Creates opportunities from existing sales leads. This program should be run after the Import Sales Leads program. Parameters: Debug Mode Trace Mode
No	Drop Temp Tables for Home Page Materialized Views	This will clean up all the Temp tables that were created during the Initial Load or Opportunity and Leads Reports bin jobs. This does not require any parameters.
No	Generate Access Records	This is a child program of Assign Territory Accesses and does not need to be run separately.
	Generate Keys for Fuzzy Match	This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically
	Generate Territory Packages.	This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.

Mandatory	Concurrent Program Name	Description
No	Index Creating for Missing Indexes for Materialized Views	This will create any missing index for the materialized views and reanalyzes the materialized view tables. This does not require any parameters
Yes	Initial Build of Forecast Summary Tables	This program will build the materialized view used for forecasting. This program must be run initially before users can forecast. Run after Refresh AS_PERIOD_DAYS, Refresh of AS_PERIOD_RATES, and Refresh of AS_SALES_CREDITS_DENORM.
Yes	Initial Build of Opportunity and Lead Bins	Used for the Opportunity and New Leads home page bins. This program must be run initially before users can set up opportunity and new leads bins. This program loads the opportunity and leads materialized view with sales credit information. No parameters are needed. **Note:** This program must be run anytime the as_sales_ credit_denorm is rebuilt or when values such as sales stages and statuses have changed. You should also run when Refresh AS_ PERIOD_DAYS is run.
Yes	Initial Load for Lead Reports	This program is used to build New Leads reports.
	Initial Load for Opportunities Reports	This program is used to build opportunity reports.
No	Load Interest Types and Codes to Inventory Categories (Load Categories)	This concurrent program creates inventory categories under the inventory category set "Oracle Sales and Marketing" for each combination of interest types and codes. In order to use this concurrent program, the OS: Inventory Category Integration profile value must be set to Yes.
	Opportunity Exchange - Get Opportunities	This program will poll the LETS server and retrieve the relevant partner opportunity details. This program should be run at regular intervals by users with Opportunity Exchange privileges.
	Opportunity Exchange - Push Opportunities	This program will send the information to the LETS server to be picked up by the partners. This program should be run at regular intervals by users with Opportunity Exchange privileges.
No	OTS: Load Sales Lead Interface Table from Flat File	Use this program to import sales leads from the interface. This program must be run before Auto Create Opportunity from Sales Lead. This moves data from the interface table to AS_SALES_LEADS, AS_SALES_LEADS_LINES, and AS_SALES_LEAD_CONTACTS. If you want to import data from a flat file, you must first run OTS: Load Sales Lead, which will move data from the flat file to the interface table.

Mandatory	Concurrent Program Name	Description
Yes	Periodically Purge ASF_ RECORD_VIEW_ HISTORY	This table memorizes which records a user has visited. In order to prevent the table from growing too large, the program should be run as least once a week. If you are running on a database whose table space is a problem, run this program daily.
No	Refresh AS_PERIOD_ DAYS table	This program must be run before you can run the Refresh of as_ sales_credits_denorm (in complete mode), Initial Build of Opportunity Bins, and the Build Materialized View for Forecast Main Page. This sequence of programs must be rerun if the GL period definitions are changed. If this program is run, then the following programs must also be run: Refresh of AS_SALES_CREDITS_DENORM (Complete), Refresh of Forecast Summary Tables,Initial build of Opportunity Bins Data
No	Refresh Materialized Views for Forecast Reports	This program is used to refresh the leads reports.Run on an as needed basis. Always run after applying a patch. Always run after Refresh AS_PERIOD_DAYS is run.
	Refresh Multi-Currency Conversion Rates (AS_ PERIOD_RATES)	Will refresh the multi-currency conversion rates in setting multiple currency.
Yes	Refresh of as_sales_ credits_denorm	Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters are: Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh). Incremental Refresh = Run in this mode for an incremental refresh
	Refresh of Forecast Summary Tables	This program is used to refresh the materialized view used for forecasting. This program should be run periodically.
No	Refresh of Leads Bin Data	This program is used to run an incremental refresh of the materialized view used for the New Leads bins. This program should be scheduled to run periodically.
	Refresh of Opportunity Bins Data	This program is used to run an incremental refresh of the materialized view used for the opportunity bins. This program should be scheduled to run periodically. **Note:** Users will not see opportunities in bins created after the last refresh of "refresh sales credit".
	Setup Checking for Oracle Sales application	This program validates Sales Setups and produces an error log that the system administrator can use to diagnose invalid setups. Parameters: Upgrade - Yes/No