Oracle® TeleSales

Concepts and Procedures

Release 11*i*

November 2001

Oracle TeleSales Concepts and Procedures, Release 11*i*

Part No. A95177-01

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Send Us Your Comments

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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle TeleSales Concepts and Procedures*.

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*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle TeleSales.

This guide is optimized for online use. It is organized in short topics that are linked to each other using hyperlinks. This means that this guide is best viewed in the PDF or HTML formats which permit you to use the hyperlinks and search the guide.

The main chapter of this document organizes topics in three groups:

- “Understanding Oracle TeleSales provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application’s relationships to other Oracle or third-party applications.
- “Using Oracle TeleSales” provides process-oriented, task-based procedures for using the application to perform essential business tasks.
- “Administering Oracle TeleSales” provides you with information about customizing your application and provides information on procedures for administering Oracle TeleSales.

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

Oracle TeleSales Implementation Guide

This guide explains how to implement the features of Oracle TeleSales. Many of the procedures and explanations in this guide can be used to administer the application after the product is implemented.

Installation and System Administration

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.

Installing Oracle Applications

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 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 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.

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 Oracle8i 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.

Understanding Oracle TeleSales

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

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 eBusines 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.

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

About Access to Information and Security

The application administrator determines what information you can access and modify in Oracle TeleSales by using a combination of:

- Responsibilities
- Sales teams
- Territory assignment
- System profile options
- Sales groups

What follows is a brief overview of the different elements which affect your access to information. A modification in any of these settings can determine whether you can modify or even view leads, opportunities, and other customer data in the database.

For more information about specific settings and profile options, see the *Oracle TeleSales Implementation Guide*.

Responsibilities

The application administrator can control access to information for whole groups of employees using the responsibility you select when you log into the application.

Sales Teams

Membership on a sales team gives you access to the information the sales team is attached to. If you are a member of an opportunity sales team, for example, you gain access to that opportunity.

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

Sales team members with the Full check box selected have the ability to update information. Members with the check box not selected have read-only access.

In some implementations, not being on a sales team for a customer means you cannot view any information about that customer at all or even know whether the customer exists in the database.

Territory Management

The eBusiness Suite's Territory Management module affects access to information by assigning agents to lead, opportunity, and customer sales teams. Territory assignment can be made based on postal code, customer type, or other criteria determined by the territory management team.

Note: In some implementations, it may be possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This may result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab to over-ride territory assignment and prevent this from happening.

System Profile Options

System profile options set by your application administrator determine the level of access provided by groups, roles, sales teams.

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

Sales Groups

Selecting a sales group before you start working in the eBusiness Center determines how opportunity information you enter is rolled up and reported in the sales hierarchy.

For managers, it also affects access to information created by that manager's subordinates.

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

About Working with the Oracle TeleSales User Interface

You will be using four main windows to do most of your work. All four windows can be launched directly from the Navigator:

- Universal Work Queue

Use this window to view a list of your open leads, opportunities, and daily tasks. The work queue serves also as a launching pad for the rest of the application. Select a lead you want to view and edit, for example, click the Get Work button, and the lead opens up in the Lead Center window where you can start work right away.

- eBusiness Center

  Use the eBusiness Center as the central work area for Oracle TeleSales when you are on the phone with your customer.

  Use it to create and manage customer records, to send out collateral, enroll your customers in events, and launch the Oracle Quoting - Forms window where you prepare quotes and orders.

  The eBusiness Center also gives you a fast way to enter the basic information for leads and opportunities.

  See An Overview of the eBusiness Center for more details.

- Lead Center

  Use the Lead Center to manage the details of a specific lead. You can use this window to create new leads or to add more detail to leads you have created using the eBusiness Center.

- Opportunity Center

  Use the Opportunity Center to create and manage individual opportunities until they close. This includes managing the sales team and partners on the opportunity. You can use this window for such tasks as entering purchase interests, forecast dates, partners, and sales credits for the sales team and any partners on the opportunity.

Oracle TeleSales user interface is based on Oracle Forms technology. For an understanding of the user interface including detailed explanations of standard features such as attachments, folders, and search methods, see the *Oracle Applications User's Guide*.

Additional information is available on:

- Searching in Oracle TeleSales
- Manipulating and copying table data
- Customizing the presentation of data using Folders

About Deleting and Modifying Information in Oracle TeleSales

Whether you can modify or delete information depends on permissions set up by your application administration team.

With the right permissions, you can delete information whenever the Delete button on the toolbar is enabled. This is the button marked by a white line with a red x running through it.

As a rule, you can delete any type of information if no other type of record depends on that information. For example, you can delete a purchase item in a lead or an opportunity because no other feature of the application depends on this information.

But you cannot delete a customer record because that customer may appear in other records in the database such as leads and opportunities. Customer information you cannot delete includes addresses, phone numbers, and contacts.

However, even if you cannot delete information you can still make modifications or remove the information from use by deselecting the Active check box or entering an end date.

Note: The current version of Oracle TeleSales automatically enters today's date as the end date after you deselect the Active check box and vice versa. However, entering a future date as the end date, does not automatically make the information inactive after that date.

For example, you can modify a phone number and all places that use that phone number are updated automatically. Making a phone number inactive means that the phone number is no longer visible to other users, unless these users specify that they wish to view inactive phone numbers.

Making information inactive does not remove it from existing records that use the information. For example, if a shipping address is being used in a quote that address remains on the quote regardless of the change you make.

Two exceptions to these rules are notes and interactions. You cannot delete them because they form an audit trail of your interaction with customers. However, you can prevent others in your organization from viewing a note after you save it by making it private.

About Customizing the Presentation of Data Using Folders

You can customize the presentation of data in any window marked by a folder icon using standard Oracle Forms folder tools.

For example:

- **To hide a field**: Click with the right button of your mouse in the field and choose **Folder > Hide Field** from the pop-up menu.
- **To show a hidden field**: Click the right mouse button in the field directly above the place where you wish to display the extra field and choose **Folder > Show Field.**
- **To move a field**: Click the right mouse button in the field you wish to move and choose one of the following commands: **Folder > Move Right**, **Folder > Move Left**, **Folder > Move Up**, or **Folder > Move Down**.

Note: The Show Field command places the new field directly below where your cursor is. You must therefore ensure there is enough blank space for the new field to display so it does not overlap and hide any fields which may appear below. You can do this by moving the other fields using one of the move commands.

You can save the custom layouts you create.

The regions you can customize include the profile section of the eBusiness Center header and the Person and Organization tabs.

See the Customizing the Presentation of Data chapter in the *Oracle Application's User's Guide* for detailed instructions.

About Searching In Oracle TeleSales

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

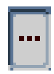
- Fast searches using the List of Values
- Searching on multiple criteria via the Universal Search window
- About optimizing your searches
- Finding text

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

Fast Searches Using the List of Values

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

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



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

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

Because searching on some fields can take up lots of computer resources, some LOV fields, including the Organization field, require you to enter two or more characters before you can start the search.

You can tell if a field requires you to make an entry before clicking the LOV button, by placing your cursor inside the field and reading the message in the message bar at the bottom of your window.

If you click the LOV button in one of the restricted fields before entering the required number of search characters, the application responds with an error message telling you to make an entry first.

If you wish to search on partial words in LOV searches, you must use the % sign to signify missing characters. See About Searching Using Partial Search Terms in Lists of Values for more details.

Note: In fields that require you to enter one or more search characters, you cannot use the % sign to substitute for all of the characters. For example, if your implementation requires you to enter three characters, then you cannot search on %%%.

Because LOV searches restrict you to one field at a time, this type of search is not suited to searching for common terms.

For example, searching for a name such as John Smith using the First Name LOV or the Last Name LOV, may return hundreds of John Smiths for your to sort through. In this case, you must use the multiple search criteria available via the Universal Search window.

Searching On Multiple Criteria Via the Universal Search Window

Use the Universal Search window to search for information using multiple search criteria. You can launch this window directly from the Navigator, by clicking the Find (the flashlight) icon in the toolbar, choosing Find from the View menu, or by clicking the Find button in the eBusiness Center. For more information see About Searching, Creating Lists, and Navigating with Universal Search.

About Optimizing Your Searches

For the fastest performance, you must narrow down the range of information you are searching as much as possible.

For example, if you receive a call from John Smith at ABC Corp., you should first use the Organization List of Values (LOV) to search for ABC Corp. and then use the First Name or Last Name LOVs to search for the name. Searching for the organization first narrows the range of individuals your application must search to just those who work for ABC Corp.

By contrast, searching for John using the First Name LOV searches all contacts for all organizations in your database. This can take some time if your organization has a large database of contacts.

Narrowing-down your searches using LOVs may create more work for you, however, if your database contains duplicate records. For example, if you have more than one ABC Corp. in your database and you pick the wrong one, then you will not find John Smith among the contacts. In this case, you must enter another ABC Corp. and try again.

If you are not sure about the best way to search, then use the Universal Search window for the greatest flexibility.

Finding Text

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

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

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

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

About Searching Using Partial Search Terms in Lists of Values

Many Lists of Values fields let you search for partial words and numbers by using the% sign to indicate missing or unknown characters.

For example, a search for `j%n` in the First name field retrieves all first names starting with the letter j and ending with the letter n, including John, Jon, and Johann. A search for `jo%` retrieves all names starting with the letters "Jo". A search for `%jo%` retrieves all names with the letters "jo" in the middle. To ensure quick performance, it is best not to use this last form of search.

You are restricted to using the % sign for searches in all fields where the user does the data entry. For example, it is users who enter first and last names, so you can use the % sign to search these. By contrast, the list of states is fixed and is entered by the application's implementer. You cannot use the % sign in the state field. This means, for example, that you cannot enter `c%` in the state field to search for opportunities in both California and Colorado. You have search for California or Colorado separately.

If you use the % incorrect fields, you receive an error message to use the list of values to enter the search term instead.

About Searching, Creating Lists, and Navigating with Universal Search

You can use the Universal Search window to:

- Search and display the results in the eBusiness Center, Lead Center, or Opportunity Center
- Create lists
- Track dynamic information by saving and reusing queries
- Navigate quickly to unrelated information

You can launch the Universal Search window either directly from the Navigator or by clicking on the Find icon in the toolbar.

Searching

In the Universal Search window, you must choose between two types of searches handled by separate tabs:

- Quick searches which are optimized for fast retrieval of commonly used information.
- Expanded searches which permit you to search using a large number of parameters and their values.

Note: When entering search terms, use the % sign to represent any unknown characters only in customer-related fields. These include First Name, Last Name, and Organization Name. See About Searching Using Partial Search Terms.

Quick Searches

Searches using the Quick Search tab are optimized for fast retrieval of basic information. You select a radio button for one of the available queries, fill in the search criteria in all the fields, and click **Search**.

There are ten different quick searches for organizational contacts, for example. The searches range from a last and first name search to a search by different product interests.

Expanded Searches

If you require a search based on a different sets of search criteria than those available on the Quick Search tab, or you wish to search by a range of values, then enter queries on the Expanded Search tab instead.

The Expanded Search tab consists of the Basic region with fields where you can enter a combination of the most common search criteria and the Advanced region, where you can enter search criteria and the range of values you are searching for. You can enter search terms in either region or both.

You can save your query criteria for later reuse. (See Saving and Reusing Query Criteria).

Displaying Results

The results of both the quick and advanced searches are displayed as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

You can display any item by selecting it and clicking the Apply or OK buttons. Apply leaves the search window open in the background so you can come back and make alternate selections. OK selects one item and closes the window.

The application displays an item where appropriate. Customer information appears in the eBusiness Center, leads in the Lead Center and opportunities in the Opportunity Center.

You can view all of the publicly accessible notes associated with an item by clicking the View Notes button.

Creating Lists

You can save the results of your search as a list by clicking the Save Results button. The lists you have saved appear in the Saved Results tab and can be used elsewhere in the application. You may wish to create a list a callback list or a list of contacts you wish to export to a spreadsheet.

Tracking Dynamic Data by Saving and Reusing Search Criteria

Lists are static. They give you a snapshot in time of your data. If you want to keep track of information that is changing all the time, then you may want to save your search criteria rather than creating a list. That way you can rerun the same query as often as you want and get the latest information each time. For example, you may want to refresh a list of your open opportunities and hot leads on a daily basis.

You can save your search criteria when you use the Expanded Search by clicking the Save Criteria button.

Using the Universal Search Window as an Information Navigator

You can use the universal search window to give you one-click access to information. Query up your hottest leads, for example, and display any of them with a click of a button in the Lead Center. Selecting a check box allows you to open up multiple Lead Centers, eBusiness Centers, and Opportunity Centers so you can work multiple customers at the same time.

An Overview of the eBusiness Center

The eBusiness Center is divided into four functional areas:

- Header
- Profile
- View Details For radio buttons
- Tabs for entering transactions and details about the customer

Header

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

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

Profile

This region, located to the right of the header, gives key information about the organization, consumer, or organizational contact you select using the View details for radio buttons below. The information in the Profile region comes from the tabs below. This region is folder-enabled. This means that you can customize the presentation of data using standard Oracle Folder tools.

View Details For Radio Buttons

Selecting one of the radio buttons here determines what party displayed in the tabs below. For example, if you select the radio button with the name of the person (the first from the left) and enter a phone number in the Address/Phone tab, then this phone number is stored in the database linked to the record of the party of Person (consumer).

If you enter the same phone number after selecting the radio button labeled with the name of the person and the organization (the third radio button from the left), then this number is linked to the Party Relationship party in the database and is not visible when you are looking at the phone numbers for the party of Person. See how customer information is organized for more information.

Tabs for Entering Transactions and Details About the Customer

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

See About eBusiness Tabs for more information on each tab.

Before you start using the eBusiness Center, you must familiarize yourself with how customer information is organized.

About eBusiness Center Tabs

The tabs of the eBusiness Center is where you enter and manage information for the party you select in the View Details For region. There are sixteen standard tabs, but your organization may implement more or less.

If not all tabs are visible on your screen at the same time, use the pop-up menu on the right of the tab region, to move to hidden tabs. The button used to launch the pop-up menu is labeled with the right and left arrow as shown below:

Which tabs are active and how the information you enter here is stored in the database depends on which of the View Details For radio buttons you select.

The tabs that are included with your Oracle TeleSales license are:

- Overview
- Dashboard
- Organization
- Person
- Address/Phone
- Relationship
- Account
- Lead
- Opportunity
- Quote/Order

- Event
- Collateral
- Task
- Notes

The following tabs provide additional functionality that is available only if your implementation licenses the appropriate application:

- Service Request
- Collection

About the Overview Tab

Use the Overview tab to:

- Enter the marketing source code relating to the promotion the customer or prospect is calling about and to view what marketing activities are targeted at the customer.
- Get an overview of the interactions anyone in your organization has had with a customer. See About Interactions for more details.
- Launch scripts for your customer interaction.

About the Dashboard Tab

The Dashboard tab provides a comprehensive overview of critical customer data pertaining to tasks, leads, opportunities, contracts, orders, service, installed base as well as customer intelligence.

Provided you have the appropriate responsibility assigned to you, you can view the individual records which contribute to the summary data for any category. In this way, the Dashboard can serve as a launching point for your work.

Note: The information in the dashboard is updated based on a schedule determined by your application administrator. If you wish to view the latest information, you must click the Refresh button.

About the Organization Tab

The Organization tab is where you:

- Enter information about an organization
- Restrict contact with the organization

Information About an Organization

You can enter basic information about an organization such as revenue and the number of employees in the tab directly.

You can access other information, including the sales team and multiple Standard Industrial Classification (SIC) classifications in a separate window which is available by clicking the Details button.

Contact Restrictions

The tab includes a Restriction(s) Exists check box which indicates whether any contact restrictions have been entered.

You can view the restrictions and set up your own in a separate window which is available by clicking the Restriction button.

> **Note:** Contact restrictions are specific to the party you selected using one of the View Details for radio buttons. If you specify that the individual as a contact at an organization (Party Relationship) does not want to be called, this does not set up restrictions for contact with that person as a consumer (Person).

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

About the Person Tab

The Person tab is where you:

- Enter and view information about a consumer or a contact at an organization
- Set up contact restrictions.

Personal Information

The personal information is divided into two regions:

- The Person Profile where you enter personal information on a contact or consumer.

  You can track the individual's personal interests, job experience, education, and leisure activities in a separate window which you can open by clicking the Details button.

- The Business Profile where you enter information on a contact at an organization including title and position. This region is disabled when you are viewing a consumer (party of type Person).

  You can classify the individual's role as a contact at the organization by using a separate window available by clicking the Contact Roles button.

Contact Restrictions

The tab includes a Restriction(s) Exists check box which indicates whether any contact restrictions have been entered for the individual.

You can view restrictions and set up your own in a separate window which is available by clicking the Restriction button.

Note: Contact restrictions are specific to the party you selected using one of the View Details for radio buttons. If you specify that the individual as a contact at an organization (Party Relationship) does not want to be called, this does not set up restrictions for contact with that person as a consumer (Person).

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

About the Address and Phone Tab

The Address/Phone tab of the eBusiness Center is where you enter contact information including addresses, phone numbers, email addresses, and URLs for the party you selected using one of the radio buttons in the View Details for region.

You can designate an address you enter here as primary by selecting the Primary check box. This is the address that appears whenever the party is displayed in the eBusiness Center header. A party can have only one primary address.

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

To create quote and orders, to ship collateral, and to enroll contacts in events, you must specify bill to and ship to addresses.

If more than one address falls in the same use category, you must specify which of these is the primary address for that type. For example, if you designate ten addresses as the billing addresses for an organization, then you must designate one of these as the primary billing address.

Designating a billing address to be primary means that this address is automatically defaulted whenever an agent enters a billing address on a customer invoice, for example.

Each address type has its own primary address, but you can have only one primary address for each address type.

Note: A primary designation for an address type is not the same as the primary address for a party.

About the Relationship Tab

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

About the Account Tab

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

About the Lead Tab

Use the Lead tab to view and create leads for the customer displayed in the eBusiness Center header.

The left side of the tab lists all of the leads for the party you have selected.

Note: In the table listing leads, a green check mark means yes. For example, a green check mark in the Urgent column means that the lead is urgent. A red x mark means no. For example, a red x mark in the Open column means that the lead is closed.

Selecting a lead in the list on the left displays basic information about that lead on the right. You can also use the right side of the tab to enter the basic lead information while you are on the phone with your customer. To enter lead details you must use the Lead Center which you can launch form this tab by clicking the Details button.

See About Leads for more information.

About the Opportunity Tab

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

The tab provides you with a fast way to enter the basic opportunity information while you are on the phone with your customer. To enter some of the details for the opportunity, you must use the Opportunity Center which you can launch form this tab by clicking the Details button.

About the Quote and Order Tab

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

About the Event Tab

Use this eBusiness Center tab to enroll individual customers and prospects in events.

Here are the different features of the tab you use to create your enrollment order:

- Event description
- Enrollees
- Collateral
- Added to Order indicator
- Add to Order and Update Order button
- Event details

Event Description

The left half of the Select Event region is where you enter and view events.

You use it to view both the events you wish to add to the order as well as events already in the order.

Making an entry in the Source Code field narrows down the list of events that appears in the Event Name field List of Values. By leaving this field blank you can access all events regardless of source code, but you must enter at least one source code before you can complete the order. You can order events associated with multiple source codes in the same order.

Enrollees

The right side of the Select Event region is where you enter enrollees and select the pieces of collateral they will receive regarding the event.

You can enroll multiple consumers and organizational contacts in multiple events in single order, but all recipients must be entered in the database and have established relationships with the individual displayed in the eBusiness Center header.

This means that in any single order you can only enroll contacts at the same organization or, if you are enrolling consumers, you can enroll only individuals who have established relationships with the consumer displayed in the eBusiness Center header.

For example, if John Smith calls in and wants five friends enrolled in an event, these five friends must be entered into the database first and have relationships to John Smith recorded using the Relationship tab.

If the enrollees are not in the database or you do not know who they are, you can enroll one contact multiple times to hold spaces for the others.

Collateral

The Collateral region is where you check off what event collateral is sent to the enrollee shown in the name field. You can only select collateral that has been associated with this event in Oracle Marketing Online.

Added to Order Indicator

The Added to Order indicator at the top of the tab tells you:

- Whether the event you are viewing has been added to the order
- How many events you have in the order.

The first field tells you which event in the shopping cart you are viewing. The second field shows how many events are already in the shopping cart.

When there are no items in the order, both fields are blank:

When you are viewing an event on the Event tab and you already have added events to the order, then the first field is blank and the second field tells you how many items are already in the order.

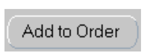
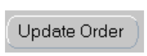
When you are viewing an item already in the order, both fields have numbers in them. The first number is the number of the item you are viewing. The second number tells you how many items there are in the order. The following indicator image tells you that you are viewing the first event of the three in the order.

Use the arrow controls to move through the items in the order:

Button	Function
	Go to the next item in the order.
	Go to the previous item in the order.

Add to Order / Update Order Button

The middle button, located between the Remove and Review Order buttons on the Event tab, changes from Add to Order to Update Order whenever you are viewing an event in the order.

Button	Meaning
	The item displayed in the Select Event region has not yet been added to the order. Users must click this button to add an event to the order.
	The item displayed in the Select Event region has been added to the shopping cart. Users must click this button to save any changes to an order.

Event Details

You can view detailed information about the event such as the event agenda, location, and driving directions, by clicking the Event Details button.

About the Collateral Tab

The Collateral tab is where you create an order for collateral to be sent, emailed, or faxed to one or more business contacts or consumers.

For faster performance, the application restricts the recipients you select to the party you are viewing in the eBusiness Center header and the View Details For radio button you have selected:

- If you are requesting collateral to be sent to consumers, you select recipients that have an established relationship with the consumer displayed in the header.

- If you are sending the collateral to contacts at an organization, then you can select recipients who are contacts at that one organization.

Here are the different features you use to create your order:

- Collateral item description
- Recipients
- Added to Order indicator
- Add to Order and Update Order button

Collateral Description

The left half of the Select Collateral region is where you enter and view the collateral items you wish to send to the customer.

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

Making an entry in the Source Code field narrows down the list of collateral that appears in the Collateral Name field List of Values. By leaving this field blank you can access the collateral associated with all source codes, but you must enter at least one source code before you can complete the order. You can order collateral associated with multiple source codes in the same order.

Recipients

The right side of the Select Collateral region is where you select recipients and shipping information.

You can send collateral to multiple recipients in one order, but all recipients must be entered in the database and have established relationships with the individual displayed in the eBusiness Center header.

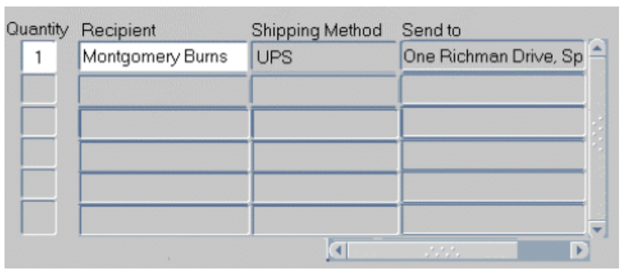
This means that in any single order you can only send collateral to contacts at the same organization or, if you are sending contacts to consumers, you can send collateral only to individuals who have established relationships with the consumer displayed in the eBusiness Center header.

For example, if John Smith calls in and wants five company brochures sent to five friends, these five friends must be entered into the database first and have relationships to John Smith recorded using the Relationship tab.

The layout of the tab changes, depending on what type of collateral you are adding to the order.

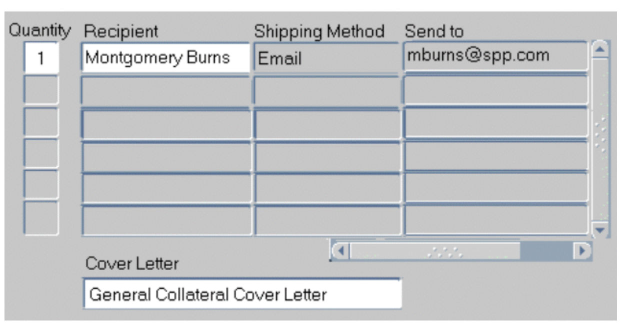
For physical collateral you:

- Enter the quantity of the collateral you wish to send.
- Enter the recipient
- If required, select the shipping method. The application administrator can select a default shipping method for your organization by setting a system profile option.
- If required, select an alternate address. The primary address for this recipient automatically defaults in the Sent to field, but you can select an alternate address.



For electronic collateral, you select the email address and the cover letter, the email to which the collateral will be attached. The cover is created within Oracle Marketing Online.

Application administrators can determine the default cover letter, by setting a system profile option.



Added to Order Indicator

The Added to Order indicator at the top of the tab tells you:

- Whether the item you are viewing has been added to the order
- How many items you have in the order.

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

When there are no items in the order, both fields are blank:

When you are viewing an item in the Collateral tab and you already added items to the order, then the first field is blank and the second field tells you how many items are already in the order.

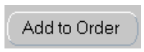
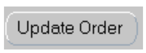
When you are viewing an item already in the order, both fields have numbers in them. The first number is the number of the item you are viewing. The second number tells you how many items there are in the order. The following indicator image tells you that you are viewing the first item of the three in the order.

Use the arrow controls to move through the items in the order:

Button	Function
	Go to the next item in the order.
	Go to the previous item in the order.

Add to Order / Update Order Button

The middle button, located between the Remove and Review Order buttons on the Collateral tab, changes from Add to Order to Update Order whenever you are viewing an item in the order.

Button	Meaning
	The item displayed in the Select Collateral region has not yet been added to the order.
	The item displayed in the Select Collateral region has been added to the shopping cart. Users click this button to save any changes in collateral or recipient information in an order.

About the Task Tab

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

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

Where you create a task determines how a task is categorized in the work queue. If you wish to assign a task for an opportunity, then create the task in the Lead Center. Use the Opportunity Center to create tasks related to opportunities.

The task tab is divided into two regions. The left side presents the list of existing tasks you can view in the region to the right.

You can sort the list of tasks in the list by any column and can restrict the list to displaying only private tasks by selecting the Private check box below. Selecting the Display All check box displays closed tasks in addition to open tasks.

You can use the right side of the tab to view the details of an existing task you have selected in the list or to enter a new task. To create a new task you must first click the New button.

About the Notes Tab

Use the Notes tab to review and enter notes on the party you have selected using the View Details For radio buttons.

About the Service Request Tab

Use the Service Request tab to create a quick service request for a customer. The service request may or may not be related to a problem with a product. If the problem is product-related, then you can validate it against the installed base of products for the customer.

From this tab, you can access Knowledge Base, a rich repository of solution sets, to resolve the customer problem during the very first customer interaction.The embedded knowledge management module, leveraging the Oracle Inter-Media technology, enables you to search, capture, and manage problem resolution information from existing service requests.It offers multiple search capabilities which allow you to find information easily.

Contract entitlements of the customer can also be viewed from the Service Request tab.Based on the contracts in effect, you can render the appropriate level of customer support.

To log complex service requests, you can use the Service Request window which you can launch by clicking the Details button.

See *Oracle TeleService Concepts and Procedures* for more information about how to use this feature.

About the Collection Tab

The Collection tab of the eBusiness Center displays overdue balances, payment information, aging, and delinquent invoice information. A collections agent clicks the Details button on the tab to access the Collections application where more Collections functionality is available.

About Interactions

An interaction records customer-related activities in the eBusiness Suite of applications. Each interaction record includes an identifier for the record involved, the time and date the interaction took place, and the individual who contacted the customer and information about the outcome of the interaction. When you end an interaction you are asked to enter information about the outcome of the interaction.

This topic covers:

- Overview
- Starting and ending your interactions

- Wrap up
- Viewing Interactions

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

You 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 you end the interaction by clicking on the Wrap-up button, you enter information about the outcome of the interaction in the wrap-up window. The interaction record lists all the activities you performed while the interaction was open.

Your implementation team can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever you search for or modify a customer record and ends when you search for a record belonging to another party, changes parties, or close the form where the interaction began.

Your implementation team can set up interactions to require you to record the outcomes of your interactions with customers in a wrap-up window or to record a default outcome automatically.

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).

Starting and Ending Your Interactions

Depending on your implementation, some interactions, such as a call to a customer, start an interaction automatically. Or you can start an interaction yourself by choosing Start Interaction from the Tools menu.

You can end the interaction by choosing End Interaction from the Tools menu, or you can wait for the application to prompt you to end the interaction automatically. This happens whenever you switch parties (change customers) and update the new record.

> **Note:** Merely switching parties does not automatically prompt you to end an interaction with the previous party. You must update the new record first. This allows you to view information from other parties without having to restart the interaction.

If you choose to start and end an interaction manually, use the Start Interaction and End Interaction buttons on the toolbar. These are the two buttons with a stop light icon: a green stop light for starting and red for ending the interaction.

You can tell when an interaction is being recorded by examining the start and end interaction buttons in the toolbar. If the Start Interaction button is disabled and the End Interaction button is enabled, this means that your interaction is being recorded.

Wrap Up

When you end an interaction, you are asked to enter information about the outcome of the interaction in the Interaction Wrap Up window.

Viewing Interactions

The list of interactions you can obtain on the Overview tab of the eBusiness Center gives you an audit trail of all of the interactions with customers in any eBusiness Suite application. For example, if someone else in your sales organization makes a change to an opportunity you are working on, you will find a record of the interaction here.

You can view the database record involved in any interaction by double clicking on the interaction entry. This displays the database record in the eBusiness Suite application where it was created. For example, double clicking on a record of an interaction on a lead, displays the lead in the Lead Center. Double clicking on a record of a service request, displays the service request in Oracle Customer Care.

About Sending Collateral

Sending collateral to prospects and customers is a two-step process. You use the Collateral Tab of the eBusiness Center to create the order and then confirm it in a separate window before it can be fulfilled.

Confirming the order requests the collateral to be sent. It is up to the different fulfillment services to ensure that collateral is actually delivered.

Information about the recipients and the collateral you wish to send must already be in the database. For electronic collateral, the database must have the collateral file itself.

For example, before you can create an order for prospects to receive an email about a new product, your database must already contain the email and the recipient information, including email addresses.

You can create new recipient records for the order by choosing New Contact from the Active menu when viewing the Collateral tab of the eBusiness Center.

About Enrolling Individuals in Events

This topic explains how to use Oracle TeleSales to enroll customers and prospects in marketing events.

Enrollment is a two step process. You first select the event and source code and add enrollees. You then confirm the enrollment in a separate window.

You can enroll people in either paid or unpaid events. When you enroll an individual in an unpaid event that has space available, you receive confirmation number for that enrollment immediately. When you enrol an individual in an event where payment is required, the space for that individual is reserved until payment is processed. You get a confirmation number only after the event is processed.

The cost of an event may vary depending on what source code you select. You may also be able to adjust the price for your order. Both factors depend on how the event is set up in Oracle Marketing Online.

If the event is full and has wait list set up and you try to enroll more people than the number of available spots, any individuals not registered are automatically wait listed. The wait list is kept on a first come first serve basis.

Enrollment Procedure

Use the Event tab to create an order to enroll one or more individuals in one or more events. For faster queries, the application restricts the enrollees you select in one order to the party you are viewing in the eBusiness Center header and the View Details For radio button you have selected:

- You can enroll multiple consumers in one order provided the consumers have an established relationship with the consumer displayed in the header.
- You can enroll multiple organizational contacts in one order, but they must be from the same organization.

About Leads

This topic covers:

- Lead Overview
- Lead routing
- About lead status
- Ranking
- Assigning qualified leads to sales representatives

Lead Overview

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

Agents use leads to gather information on:

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

The person creating a lead has the option of assigning it manually to a sales agent, who becomes the lead owner, and specifying other agents to be on the lead's sales team. Or the agent can let the CRM Territory Management module automatically assign an owner and a sales team to the lead.

Lead Routing

Depending on the implementation, Oracle TeleSales can automatically assign leads to individual agents who become the lead owners and to whole sales teams. When individual agents create leads, they automatically become the lead owners, and have the option of assigning the leads manually. Depending on the implementation, the assigned lead shows up on the work queues of the owner of the lead or the whole sales team. The agent can accept or refuse the lead assignment by displaying the lead in the Lead Center and clicking either the Accept or the Decline buttons.

Lead Status and Qualification

The progress of a lead is tracked by its status and qualification flag.

The status of a lead and lead qualification provide independent ways of tracking progress of a lead. A lead must become qualified before it can be turned into an opportunity.

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, and budget.

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

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

Lead Rank

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 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.

Lead 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.

Assigning Leads To Sales Representatives

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

About Opportunities

This topic covers:

- Opportunity Overview
- How you create an opportunity

Overview

Use an opportunity to enter and track:

- **Progress of Your Sale**
- **Purchase Interests:** Enter the products or categories of products the customer is interested in buying and the projected amounts.
- **Sales Team**: Add individual sales team members or entire sales groups to form a team.esor let the territory management module assign a team. The sales team
- **Sales Methodology:** Select a sales methodology
- **Sales Credit**: The sales credit the sales team members are to receive.
- **Contacts**: Contacts for the opportunity.

- **Obstacles**: Enter information about your competitors.
- **Closing Information**. Track orders placed for won opportunities as well as information about competitors for lost opportunities. If an opportunity results in a sale, you must remember to enter closing information for an opportunity so the sales team can receive sales credit for their work.
- **Classification**: Classify an opportunity according to categories defined by your implementation team. The values you enter here can be used to assign this opportunity to the appropriate sales team. If your company has a lead generation organization that forwards leads to you, then this window is likely to include information that they entered when the lead was created.
- **Tasks**: View and assign tasks relating to the opportunity. The tasks appear in the work queue of the individual you assign them to.
- **Leads**: View the leads linked to the opportunity.
- **Quotes and Orders**: View the quotes and orders resulting from the opportunity or launch the Order Capture window to create new quotes and orders.
- **Forecasts**: the amounts you enter in the purchase interests are added up as your pipeline forecasts
- **Partners**: View the history of what partners have been offered this opportunity, suggest criteria the channel manager in Oracle Partners Online will use to select a partner, or, when authorized, route the opportunity to a partner yourself.

How You Create an Opportunity

There are two ways you can create an opportunity.You can:

- Create an opportunity from a qualified lead
- Create it without a lead

Creating an Opportunity from a Qualified Lead

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

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

- Link the lead to the existing opportunity.

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

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

- Copy purchase line items to the duplicate opportunity.

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

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

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

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

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

Creating a New Opportunity Directly

You can create new opportunities without a prior lead in the eBusiness Center or the Opportunity Center. The Opportunity Tab of the eBusiness Center provides you with a way to quickly enter basic opportunity information while the Opportunity Center lets you fill in the details.

About Collateral

You can use Oracle TeleSales to create an order for sending electronic or physical collateral to prospects or customers.

Electronic collateral consists of an email body or fax cover letter and the electronic files of the collateral itself. Both are created within Oracle Marketing Online and emailed or faxed to customers through One on One Fulfillment, a module of the Oracle CRM eBusiness Suite.

Physical collateral is tracked in Oracle Inventory and shipped through Oracle Order Management. It can be created either in Oracle Marketing Online or in Oracle Inventory.

In the current release, you cannot use Oracle TeleSales to process payment for either type of collateral you send to customers.

The order you create in the Collateral tab of the eBusiness Center is executed either through an email server in the case of electronic collateral or through the shipment of one or more inventory items. You must check the Collateral History window available from the Actions menu to see whether the collateral has actually been sent out and delivered.

About Notes

You can use Oracle TeleSales to keep notes on customers, contacts, opportunities, and leads. Your ability to access notes is dependent on the permissions you have to access the objects the note is related to. If you do not have access to a lead, for example, you cannot view or create a note for that lead.

When you create a note, the application automatically saves information on the note's creator, the date and time the note was created, and the context in which it was entered. When a sales representative creates a note while working an opportunity in the Opportunity Center, for example, that note is automatically related to the opportunity and can be viewed by anyone with access to that opportunity. It cannot be viewed by anyone who does not have access to the opportunity. (The representative can also make the note private in which case it cannot be seen by anyone else.)

The note owner can relate a note to multiple objects, however, making that note available to a broader audience. For example, a sales representative writing n opportunity note about a problem the customer is having with the service department, may want to relate that note to the customer record itself. This way everyone with access to that customer record can view that note, not only those who have access to the opportunity.

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

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

You can view and create notes from the Notes tabs which appear in the eBusiness Center, the Lead Center, and the Opportunity Center or from the View Notes window which you can launch by clicking a button on the Lead and Opportunity tabs in the eBusiness Center, or from the Universal Search window, by clicking the View Notes button.

How Customer Information is Organized

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

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

- Customer model overview
- How party type affects the way you view and enter customer information

Customer Model Overview

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

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

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

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

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

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

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

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

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

You must use the person party type to:

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

You must use the organization party type to:

- Enter and view general information about the Hall of Justice, Jack Kirby’s employer.
- View quotes and orders for the organization. This includes those placed by Jack Kirby in his capacity as employee of the organization.

- Manage leads and opportunities for the Hall of Justice. This includes any leads and opportunities on which Jack Kirby is the contact.
- View all of the other contacts at the Hall of Justice.
- View all of the quotes and orders for the Hall of Justice.

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

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

How to Select the Party Type in the eBusiness Center

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

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

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

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

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

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

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

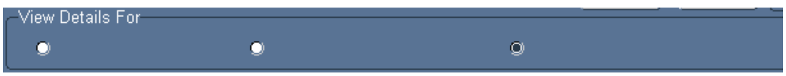
If the header displays an organization, then you are restricted to viewing and entering information for the organization.

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

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

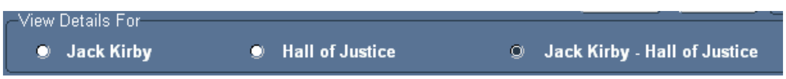
The radio buttons in the middle of the eBusiness Center is where you select what party type you wish to view and modify in the eBusiness Center tabs.

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



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

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



You can select:

- **Jack Kirby**: To enter and view information that pertains to Jack Kirby, the party type Person. This includes all personal information as well as any purchases he makes as a consumer.
- **Hall of Justice**: To enter and view all information about the Hall of Justice, the party type organization. This includes organizational details as well as all leads, opportunities, quotes, and orders. Leads, quotes, and orders are tied to the organization and not the contact.

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

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

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

Understanding Relationships in Oracle TeleSales

You can use the Relationship tab of the eBusiness Center to capture both business and personal relationships between any parties in the database and between outside parties and your internal organizations.

This topic covers:

- Type of relationships you can capture
- How to capture a relationship
- Reciprocal relationships are captured automatically

Types of Relationships You Can Capture

You can capture:

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

- Relationships between different organizations, such as "is a subsidiary of". You can establish these relationships for organizations (party of type Organization).
- Relationships between outside organizations and your own internal organizations. For example, you can track the actions of your competitors by setting up the relationship "is the competitor of" between outside organizations and your own internal organizations.

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

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

How You Capture a Relationship

You capture a relationship between two parties by displaying one of the parties in the eBusiness Center and entering the relationship to another party on the Relationship tab.

If you wish to capture relationships your organization has with other organizations such as competitors or suppliers, then you must enter your organization into the database as you would a customer. The only difference is that you flag your organization as internal by selecting the Internal check box on the Organization tab.

Reciprocal Relationships are Captured Automatically

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

For example, if you specify that John is the father of Mary, then you want Mary’s record to reflect the fact that she is the daughter of John. If you specify that ABC is the subsidiary of Walt Disney, then you want Walt Disney’s record to record to reflect the fact that it is the parent company of ABC.

Oracle TeleSales supplies the reciprocal relationships for you automatically. You only need to enter one of the relationships.

About Attaching Documents, Notes, and Web Pages

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

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

- Persons
- Organizations
- Relationships
- Addresses
- Leads
- Opportunities
- Quotes
- Orders
- Tasks

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

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

Using Oracle TeleSales

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

Choosing Sales Group Roles

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

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

Prerequisites

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

Steps

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

Recording Your Interactions with a Customer

Use this procedure to start recording interactions with a customer.

Prerequisites

Display the customer in the eBusiness Center, the Lead Center, or the Opportunity Center.

Steps

1. Choose Start Interaction from the Tools menu or click the Start Interaction button on the Toolbar

> **Note:** If the Start Interaction selection is disabled, this means that you are already recording your interactions.

Your interactions with this customer are recorded until you terminate the recording process by clicking **End Interactions** in the toolbar.

References

About Interactions

Wrapping Up an Interaction with a Customer

Use this procedure to stop recording your interactions with a customer and to enter information about the outcome of your interactions.

Prerequisites

Display the customer in the eBusiness Center, the Lead Center, or the Opportunity Center.

Steps

1. Choose End Interaction from the Tools menu or click the Start Interaction button on the Toolbar

   > **Note:** If the End Interaction selection is disabled, this means that you are not currently recording interactions.

   The Interaction Wrap Up window appears listing the interactions you have had with the customer.

2. Use the Outcome List of Values (LOV) to select an outcome for the interaction.

3. Optionally, use the Result and Reason LOV to record more details about the activity.
4. Optionally, you can also record the outcomes, results, and reasons for each individual activity recorded below.
5. Click **End Interaction** when you are done.

References

About Interactions

Setting Up a Default Sales Role for Yourself

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

Prerequisites

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

Steps

1. Navigate to Profile User Values.

   The Find Personal Profile window appears.
2. In Profile Name enter: `OTS: Default User Role%`

   The Personal Profiles window appears displaying the system profile OTS: Default User Role and Sales Group.
3. Use the User Value List of Values to select a default role and sales group.
4. Click **Save** on the toolbar.

Using the Universal Search Window

You can use the Universal Search window for:

- Searching
- Creating a list
- Saving a query for reuse

- Searching using a saved query
- Viewing a list you have created
- Changing the status of a list you have created

For more information on the Universal Search window, see About Searching, Creating Lists, and Navigating with Universal Search.

Searching Using the Universal Search Window

Use this procedure to search your database using the Universal Search window. You can search either by using the Quick Search tab, which is optimized for fast retrieval, or by using the Expanded Search tab. You cannot combine the two methods of searching.

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

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

Prerequisites

If you are searching for events, collateral, or source codes you must have the eBusiness Center open and use the appropriate search button to launch the Universal Search. This is because searches for this type of information can be done only using those buttons.

Steps

1. If you are searching for collateral, then click **Search Collateral** on the Collateral tab of the eBusiness Center.
2. If you are searching for Events then, click **Search Events** on the Event tab of the eBusiness Center.
3. If you are searching for a Source Code, then click **Search** on the Overview tab of the eBusiness Center.

4. For customer and other information, launch the Universal Search window from the Navigator, or by clicking **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.

5. From the Find drop-down list, select the type of information you wish to search for.

6. If you wish to use a query you have saved for your search, then follow the procedure outlined in Searching Using a Saved Query.

7. If you wish to use one of the queries optimized for fast retrieval, then:

   a. On the Quick Search tab, select the radio button corresponding to the query you wish to use.

   b. Enter search terms in all fields.

   Note: Limit the use of the % character to customer-related fields. These include First Name, Last Name, and Organization Name. You can use the % character to represent any unknown characters in a search term. See About Searching Using Partial Search Terms for more details.

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8. If you wish to search using the expanded search, then:

   a. Select the Expanded Search tab.

   b. Enter search criteria in any of the fields in the Basic region.

   c. Enter search criteria in the Advanced region. This is done by selecting a search term using the Item List of Values (LOV), entering an operator using the Condition LOV, and entering the value of that condition in the Value field.

9. If you wish to include inactive records in the search, then select the Include Inactive Records check box.

10. Click **Search**.

    The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

11. If you wish to save the results of your search as a list, then follow the procedure in Creating a List.

12. If you wish to display an item on the list, then:

    a. If you wish to view this item in a separate window, then select the check box labeled with one of the following Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.

    b. If you wish to display one item and close the window, then click **OK.**

    c. If you wish to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

The application displays an item where appropriate. Customer information appears in the eBusiness Center, leads in the Lead Center and opportunities in the Opportunity Center.

You can view all of the publicly accessible notes associated with an item and create new notes by clicking the View Notes button.

Creating a List

Use this procedure to save the results of a search as a list. The lists you have saved appear in the Saved Results tab of the Universal Search window and can be used elsewhere in the application. You may wish to create a list a callback list or a list of contacts you wish to export to a spreadsheet.

Prerequisites

None

Steps

1. Click Find in the toolbar and perform a search using the Universal Search Window.

1. Click **Save Results.**

   The Save Results window appears.

2. Enter a list name.

3. Optionally, enter a description.

4. Check to make sure that Active is displayed in the List field.

5. Click **Save**.

The list you have created can be viewed on the Saved Results window.

Saving a Query for Reuse

Use this procedure to save queries for reuse in your searches. You may want to save queries if you wish to track information that can change rapidly. Your hot leads and opportunities, for example. That way you can rerun the same query every day or often as you like and always get the latest information.

Prerequisites

None

Steps

1. Click **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.

2. Using the Find drop-down list, select the type of information you are querying.

   > **Note:** The query you save is available for use only when you are searching for the same information type.

3. Select the Expanded Search tab.
4. Enter search criteria in any of the fields in the Basic region.
5. If desired, enter search criteria in the Advanced region. For each search term:
   a. Select the search term using the Item List of Values (LOV).
   b. Enter an operator using the Condition LOV.
   c. Enter the value of that condition in the Value field.
   d. If you wish to include inactive records in the search, then select the Include Inactive Records check box.
6. Click **Save Criteria**.

   The Save Criteria window displays.

7. Enter a name for the query you are saving. For example: `my hot leads`.
8. Enter an optional description.

9. Click **Save**.

Searching Using a Query You Have Saved

Use this procedure to search using a query you have saved.

Prerequisites

You must save your query first.

Steps

1. Navigate to the Universal Search window from the navigator of by clicking **Find** in the toolbar (this is the flashlight icon).

   The Universal Search window appears.

2. From the Find drop-down list, select the type of information you wish to search for.

   Note: Saved queries are listed only when you select the same information type used to create them.

3. Click **Open Criteria**.

   The Open Criteria window opens.

4. Select the query you wish to use from the list.
5. Click **OK**.

   The query criteria are populated in the Universal Search window.

6. If you wish, you can modify any of the search criteria now.
7. Click **Search**.

   The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

8. If you wish to save the results of your search as a list, then follow the procedure in Creating a List.
9. If you wish to display an item on the list, then:

a. If you wish to view this item in a separate window, then select the check box labeled with one of the following Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.

b. If you wish to display one item and close the window, then click **OK.**

c. If you wish to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

The application displays an item where appropriate. Customer information appears in the eBusiness Center, leads in the Lead Center and opportunities in the Opportunity Center.

You can view all of the publicly accessible notes associated with an item and create new notes by clicking the View Notes button.

Viewing a List You Have Created

Use this procedure to view a list you have created using the Universal Search window.

Prerequisites

You can only view and use lists you have created.

Steps

1. Launch Universal Search from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.

2. From the Find drop-down list, select the type of list you with to view. Lists are grouped by this information type. For example, to see a list of organizations, you must select Organization here.

3. Select the Saved Results tab.

   The tab displays the lists you have created in a dynamic table which you can sort by clicking on a column heading.

4. If you wish to filter the list by list status, then enter a status using the View Status List of Values (LOV).

5. If you wish to view all lists, then make sure the Display All Statuses check box is selected.
6. Select a list you wish to view.
7. Click **Open** to view the list.

   The tab displays the list in a dynamic table.
8. If you wish to display an item on the list in the eBusiness Center, Lead Center, or Opportunity Center, then:
   a. If you wish to open this item in a separate window, then select the check box labeled with one of the following: Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.
   b. If you wish to display one item and close the Universal Search window, then click **OK.**
   c. If you wish to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

      The application displays an item where appropriate. Customer information appears in the eBusiness Center, leads in the Lead Center, and opportunities in the Opportunity Center.

      You can view notes associated with an item by clicking the View Notes button.

Changing List Status

Use this procedure to change the status of a list you have created using the Universal Search window.

Prerequisites

You can only change the status of lists you have created.

Steps

1. Launch the Universal Search window from the Navigator or click **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.

2. From the Find drop-down list, select the type of list you with to view. Lists are grouped by this information type. For example, to see a list of organizations, you must select Organization here.
3. Select the Saved Results tab.

   The tab displays the lists you have created in a dynamic table which you can sort by clicking on a column heading.
4. If you wish to filter the list by list status, then enter a status using the View Status List of Values (LOV). A list can be either active or inactive.
5. If you wish to view all lists, then make sure the Display All Statuses check box is selected.
6. Select the list you wish to modify.
7. Use the Status LOV in the Update List Status region to select a different status.
8. Click **Save**.

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

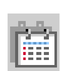
Use this procedure to access work assigned to you from your work queue. For more information about using the work queue, please see Oracle Universal Work Queue documentation.

Prerequisites

None

Steps

1. Click on the Work Queue button in the toolbar. This is what the button shows an icon of a miniature wall calendar:



   The Universal Work Queue window appears.

   The Queue pane on the left side of the window lists the categories of tasks and objects. The following are specific to Oracle TeleSales:

   - **My Leads (Owner):** All leads you own.

- **My Leads (Sales Team)**: All leads where you are a member of the sales team.
- **My Opportunities (Sales Team)**: All opportunities where you are on the sales team.
- **My Opportunities (Sales Credits)**: All opportunities for which you receive sales credit.
- **Marketing Lists**: This category displays lists of people for you to contact organized by marketing schedules. Clicking on a list displays only those people on the list you are authorized to access.

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

   The item launches in the appropriate section of the application.

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

Contacting Lists of Customers Supplied by Marketing

You can use the Universal Work Queue to contact lists of customers passed to you by the marketing team using Oracle Marketing Online. Use this procedure for contacting customers passed on to you from marketing.

Prerequisites

Your application administrator must assign campaign schedules to agents for the marketing lists to show up in your Work Queue. See the *Oracle TeleSales Implementation Guide* for more details.

Steps

1. Navigate to the Universal Work Queue.

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

2. In the left pane, click on **Marketing Lists**.

   The lists of people for you to contact are displayed below organized by the names of the marketing schedules (activities) they are associated with.

3. Select a schedule and list.

   The right hand pane displays the individuals on that list you are authorized to contact.

4. Double-click on the name of an individual you wish to display.

   The eBusiness Center launches displaying information on that individual.

Manipulating Data in Your Work Queue and Other Dynamic Tables

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

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

- Sorting
- Finding
- Copying and exporting
- Customizing layout
- Refreshing

Sorting Information in Dynamic Tables

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

Prerequisites

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

Steps

1. If you wish to sort on a field in the table, click on the grey dot in the column header.

   The blue arrow that replaces the grey dot indicates a direction of order, for example, ascending, descending, alphabetical, or chronological order.

2. You can sort in the opposite direction by clicking the header arrow again.

Finding Information in Dynamic Tables

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

Prerequisites

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

Steps

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

Copying Data from Dynamic Tables

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

Prerequisites

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

Steps

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

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

Guidelines

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

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

Refreshing Data in Dynamic Tables

Use this procedure to refresh the data in a table. You will need to do this if you think new entries were created in a different window while you have the table open.

Prerequisites

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

Steps

1. Right-click in the table.

   The table refreshes to reflect the latest information.

Customizing the Layout of Your Work Queue and Other Dynamic Tables

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

Prerequisites

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

Steps

1. You can resize any column or row by placing your cursor at the edge of the header. When the double arrow appears, you can drag the column or row to the desired size.
2. If you wish to change the order the columns, then:

   a. In a header, left-click and hold the mouse key down until a black box appears around the header.
   b. Move the header to the selected position. Allow for a delay before making the move.

3. If you wish to hide a column from view, then:
   a. Right-click the header of the column you wish to hide.
   b. Select Hide Column on the pop-up menu.

   Note: Hidden information is not copied to the clipboard.

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4. If you wish to display columns which are hidden, then:
   a. Right-click on any column header.
   b. Choose **Show Column** from the pop-up menu.

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

Creating a Note

You can create a note on a consumer (party of Person), an organization (party of Organization), a business contact (party of Party Relationship), a lead, and an opportunity. You can create notes in two places in the user interface:

- Using the View Notes window. This is available in the Leads and Opportunities tabs of the eBusiness Center or by clicking **View Notes** in the Universal Search window.
- By using the Notes tabs in the eBusiness Center, Lead Center, and Opportunity Center.

Creating Leads

You can use both the eBusiness Center and the Lead Center to create new leads and enter lead information. The eBusiness Center is designed for quick information entry while you are talking to a customer on the phone. The Lead Center permits you to enter a lead in more detail. Select from one of the help topics below:

- Creating a lead in the Lead Center
- Creating a lead in the eBusiness Center

Note: In some implementations, it may be possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This may result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab to over-ride territory assignment and prevent this from happening.

Creating Opportunities

You can create opportunities from a lead or without a prior lead.

To create an opportunity from a lead navigate to the follow the procedure outlined in Turning a lead into an opportunity

If you are creating a lead without a prior opportunity you can use both the eBusiness Center and the Opportunity Center. The eBusiness Center is designed for quick information entry while you are talking to a customer on the phone. The Lead Center permits you to enter an opportunity in more detail. Select from one of the help topics below:

- Creating an opportunity in the Opportunity Center
- Creating an opportunity without a prior lead in the eBusiness Center

Using the eBusiness Center

The eBusiness Center is where you conduct most of you work while you are on the phone with your customer or prospect. This includes entering customer information, generating leads, and tracking opportunities.

For an overview of eBusiness Center layout functionality, see An Overview of the eBusiness Center.

Help is available on the following:

- Displaying and entering customers and prospects
- Using the Overview tab
- Using the Dashboard tab
- Using the Address/Phone tab
- Using the Person tab
- Using the Organization tab
- Using the Relationship tab
- Using the Account tab
- Using the Lead tab
- Using the Opportunity tab
- Using the Quote/Order tab
- Using the Event tab
- Using the Collateral tab
- Using the Task tab
- Using the Notes tab
- Using the Service Request Tab
- Using the Collection Tab

Using the Overview Tab

Use the Overview tab of the eBusiness Center to enter the marketing source code for the promotion the customer is calling about and to view interactions your organization has had with the customer.

You can obtain help on the following:

- Entering the marketing source code associated with the call
- Searching for the marketing source code using the Universal Search window
- Launching a script for your customer interaction
- Viewing the most recent interactions
- Viewing the marketing activities targeted to your customer

Using the Dashboard Tab

Use the Dashboard tab to obtain a comprehensive overview of critical customer data pertaining to tasks, leads, opportunities, contracts, orders, service, installed base as well as customer intelligence.

Help is available on:

- Viewing a summary of customer data
- Displaying the data behind the Dashboard summary

For more information about this tab see About the Dashboard Tab.

Displaying a Summary of Customer Data

Use this procedure to view a comprehensive overview of critical customer data pertaining to tasks, leads, opportunities, contracts, orders, service, installed base as well as customer intelligence.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. In the View Details For region, select the radio button corresponding to the party you wish to view. For example, if you wish to view data on a consumer, then select the first radio button from the left which is labeled with the

individual's name. If you wish to view data about an organization, then select the second button from the left, the one labeled with the name of the organization.

> **Note:** Some of the radio buttons may be disabled depending on the party displayed in the header.

2. Select the Dashboard tab.

   The tab displays data on your customer. You may need to use the scroll bars to view all of the available data categories.

   This data is current as of the date and time displayed in the Last Refresh Date field.

3. If you wish to view more update information, then click **Refresh.**
4. If you have the appropriate permissions you can view the data behind the summaries provided by the Dashboard.

Viewing the Data Behind the Dashboard Summary

Provided you have the appropriate permissions, you can view the individual records which contribute to the summary data for any category on the Dashboard.

Prerequisites

Display the summary of customer data in the Dashboard tab of the eBusiness Center.

Steps

1. Double-click on an item in the Dashboard tab you wish to examine in more detail.

   The Drill down List window appears detailing the items that contribute to the summary.

2. Double-click on any row to display the item in the eBusiness Suite application that created it.

Using the Address and Phone Tab

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

- Entering an address
- Entering an address for a contact at an organization
- Entering an address for an organization
- Entering an address for a consumer
- Specifying uses for an address
- Indicating an address is no longer used for a purpose
- Deleting an address
- Viewing contact points and restrictions for an address

For more information see About the Address/Phone tab.

Using the Person Tab

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

You can obtain help on:

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

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

For more information see About the Person Tab.

Using the Organization Tab

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

You can obtain help on:

- Entering revenue, fiscal year, and other organization details
- Viewing an organization's products under service contracts
- Classifying an organization by purchase interests
- Selecting sales team members for an organization
- Classifying the organization by SIC and other codes

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

For more information see About the Organization Tab

Using the Relationship Tab

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

You can obtain help on:

- Capturing a relationship between a person and an organization
- Capturing a relationship between two organizations
- Capturing a relationship between two people
- Ending a relationship between a person and an organization
- Viewing contact points and restrictions for an address

For more information see About the Relationship Tab

Using the Account Tab

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

You can obtain help on:

- Viewing accounts a customer has with your organization

Using the Lead Tab

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

Note: In the table listing leads, a green check mark means yes. For example, a green check mark in the Urgent column means that the lead is urgent. A red x mark means no. For example, a red x mark in the Open column means that the lead is closed.

You can obtain help on the following lead management tasks that you can carry out from this tab.

- Searching for a lead using the Universal Search window
- Displaying a lead in the Lead tab
- Creating a lead in the eBusiness Center
- Displaying the details of a lead in the Lead Center
- Qualifying a lead
- Turning a lead into an opportunity

For more information see About the Lead Tab.

The following tasks are best carried out in the Lead Center which you can launch by clicking the Details button on the Lead tab:

- Entering purchase interests, contacts, and other details for a lead
- Viewing opportunities created from a lead
- Checking for duplicates when creating an opportunity from a lead
- Entering notes on a lead

- Viewing lead notes
- Accepting a lead assigned to you
- Refusing a lead assigned to you
- Assigning a lead to someone else
- Select individuals and sales groups for the lead sales team

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

Using the Opportunity Tab

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

Help is available on the following:

- Searching for an opportunity using the Universal Search Window
- Displaying the opportunities for a consumer or organization
- Entering a note for an opportunity
- Viewing notes for an opportunity
- Creating an opportunity without a prior lead

For more information about this tab see About Opportunities.

To carry out the following tasks you must first launch the Opportunity Center by clicking the Details button:

- Entering purchase interest for an opportunity
- Entering sales credit for purchases in an opportunity
- Entering opportunity contacts
- Classifying an opportunity
- Selecting an opportunity sales team and partners
- Viewing sales credits for an item in an opportunity
- Viewing sales credit totals for an opportunity
- Tracking obstacles to an opportunity
- Closing an opportunity so you can receive sales credit
- Assigning tasks for an opportunity
- Viewing tasks associated with an opportunity
- Viewing leads associated with an opportunity
- Viewing customer quotes and orders from the opportunity center
- Freezing an opportunity so nobody can modify it
- Creating a quote or order from an opportunity
- Splitting up an opportunity if only some items can close
- Deleting purchase items from an opportunity

- Copying an opportunity

Using the Quote and Order Tab

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

You can obtain help on:

- Viewing and modifying quotes
- Viewing and modifying orders
- Creating a quote or an order without a lead or an opportunity

Using the Event Tab

Use the Event tab of the eBusiness Center to enroll customers or prospects in events.

See About the Event Tab for an overview of this tab.

Help is available on the following tasks:

- Searching for an event using multiple search criteria
- Creating an order to enroll individuals in events.
- Viewing event details
- Completing the enrollment process
- Viewing enrollment history
- Recording attendance at an event

Using the Collateral Tab

Use the Collateral tab of the eBusiness Center to send both electronic and physical collateral to customers and prospects.

Help is available on the following:

- Creating contacts or consumers for collateral shipment
- Searching for collateral using multiple search criteria
- Preparing a collateral order for one or more recipients

- Requesting your collateral order to be sent
- Viewing collateral order history and order status

For more information see About the Collateral Tab

Using the Task Tab

Use the Task tab in the eBusiness Center to view and create general tasks for a consumer, an organization, or an organizational contact. The task you create here appears in the Work Queue of the individual you assign as the owner of the task.

If you wish to view or create tasks specific to an opportunity or a lead, then use the Lead Center or Opportunity Center instead.

Help is available on the following:

- Viewing tasks assigned for a consumer, an organization, or a contact
- Creating a task for a consumer, an organization, or a contact

Using the Notes Tab

Use the Notes tab of the eBusiness Center to view and create notes on the party displayed in the eBusiness Center header. Help is available on:

- Viewing notes
- Creating a note
- Relating a note to multiple objects

Using the Service Request Tab

Use the Service Request tab to create a quick service request for your customer. Help is available on:

Creating a quick service request

Creating a Quick Service Request

Use this procedure to create a service request for your customer on the Service Request tab of the eBusiness Center.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. In the View Details For region, select the radio button corresponding to the party for the service request. For example, if you are entering a service request for a consumer, then select the first radio button from the left which is labeled with the individual's name. If you are entering the request for an organization, then select the second button from the left, the one labeled with the name of the organization.

   > **Note:** Some of the radio buttons may be disabled depending on the party displayed in the header.

2. Select the Service Request tab.
3. The Owner, Type, Severity, Urgency, Status, and Date fields default based on the setting of system profile options.You can use the List of Values (LOV) to change these values.
4. Select the Installed Base check box if the issue is about a customer product. If this check box is selected, the Product list of values displays only the products installed at the customer site, otherwise it displays all inventory items.
5. Optionally, select a product and a serial number for the product. If you selected the Installed Base check box, then you can select a serial number from the LOV. If not, you can enter a serial number yourself.
6. If you selected the Installed Base check box, then you must use the LOV to select a reference number.This field is mandatory if Installed Base is checked.
7. Enter a brief description of the problem in the Summary field. This field is mandatory.
8. Optionally, select a problem type in the Problem field.
9. The Resolution field can be populated after the service request is resolved.
10. Optionally, select the time frame for the resolution of the problem in the Resolution By field.
11. Optionally, enter a note:
    a. Choose a note type and note status.

b. Enter a note.

c. In the Related to field, select the context to which the note is to be associated.

d. Optionally, use the Value field to select the value for the context you have selected.

For example, you can associate a note to another service request. Assuming that the service request number is 10152, you would select Service Request in the Related to field and 10152 in the Value field.

12. To check if there is a contract available, click **Get Contracts**.You can choose to view either Active Contracts or All Contracts by using the radio buttons.

13. The contracts area shows the various contracts for the customer. Double-click the contract number to view coverage information for a specific contract. Select the contract that applies to this service request.

    The date in the Respond By field is defaulted based on the contract selected.

14. Click **Submit**.

    The system generates a service request number and displays it in the Request field.You can give this number to the customer as reference.

15. You can perform a search of the knowledge base by clicking the button next to **Details** at the bottom of the window. The summary, product, contact and symptom are passed to the knowledge base. Refer to Oracle Service Concepts and Procedures for more information about searching the knowledge base.

Using the Collection Tab

Use the Collection tab to view overdue balances, payment information, aging, and delinquent invoice information. Clicking **Details** launches Oracle Collections where more collection functionality is available.

Displaying and Entering Customer Information in the eBusiness Center

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

- Searching using the Universal Search window
- Displaying a party in the eBusiness Center
- Checking if an organizational contact already exists in the database
- Checking if a consumer already exists in the database
- Checking if an organization already exists in the database
- Viewing all contacts at an organization
- Entering a new contact for an existing organization
- Entering a new contact at a new organization
- Entering a new consumer
- Entering a new organization

Displaying a Party in the eBusiness Center Header

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

- Displaying consumers
- Displaying organizational contacts
- Displaying organizations

Displaying a Consumer in the eBusiness Center Header

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

Prerequisites

The customer or prospect must already exist in the database.

Steps

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

Displaying an Organization in the eBusiness Center Header

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

Prerequisites

The organization must already exist in the database.

Steps

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

Displaying an Organizational Contact in the eBusiness Center Header

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

Prerequisites

The relationship must already exist in the database.

Steps

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

Checking if an Organizational Contact Already Exists in the Database

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

Prerequisites

None

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list in the header, select Party Relationship.
3. Search for the contact's organization using the Organization List of Values (LOV).
4.
5. If the contact's organization is listed in the Organization LOV, then:
    a. Select the Organization and click **OK** to close the LOV.
    b. Place your cursor in the First or Last Name fields.
    c. Select CTRL+L on your keyboard and use the List of Values to search for the name of the individual.

d. If a duplicate is not listed in the results of your search, then click **Cancel** to return to the eBusiness Center where you can make your new entry.

Note: If the individual does not exist as a contact at the organization, he or she may still exist as an individual consumer in the database. To ensure no records are duplicated, check if the individual already exists in the database as a consumer.

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e. If you find the individual in the search results, then click **OK** and the name is entered in the eBusiness Center automatically.

f. If too many results appear for you to examine easily, then click **Cancel** to close the LOV window and perform a complex search for the individual using multiple search criteria instead.

Checking to See If a Consumer Already Exists in the Database

Use this procedure to check if a consumer (a party type of Person) exists in the database.

Prerequisites

None

Steps

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

Checking if an Organization Already Exists in the Database

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

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Organization.
3. Place your cursor in the Organization field.
4. Select CTRL+L on your keyboard and use the List of Values to search for the organization name.
5. If the organization is not listed in the results of your search, then click **Cancel** to return to the eBusiness Center where you can make your new entry.
6. If you find the organization in the search results, then click **OK** and the name is entered in the eBusiness Center automatically.

Viewing All Contacts at an Organization

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

Prerequisites

None

Steps

1. If the eBusiness Center is blank or does not display the correct organization, then:
   a. From the Party Type drop-down list, select Party Relationship.
   b. Use the Organization List of Values (LOV) to select the organization.
   c. Use the First or Last field LOV to view the list of contacts at the organization. You can search on partial names provided you use the wild card % to indicate missing letters. See About Searching Using Partial Search Terms for more details.
2. If the eBusiness Center header displays the correct organization and Organization is selected from the Party Type drop-down list, then:

a. In the View Details for region, select the button labeled with the name of the organization.
b. Select the Relationship tab.
c. The Object Relationship region displays the contacts for the organization.
d. If you wish to view or modify the details of any of the contacts, then select one by clicking on the drill-down button to the left of the record you wish to view. The drill-down button is the unlabeled blue button all the way to the left of the record.

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

Entering a New Contact for an Existing Organization

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

Prerequisites

Check to see if the contact already exists at the organization to prevent duplicate entries.

Steps

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

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

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

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

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

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

Entering a New Contact at a New Organization

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

Prerequisites

Check to make sure the contact does not already exist in the database to prevent duplicate entries.

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Party Relationship.
3. Click **Create**.

   The New Party dialog box appears.
4. Click **Both**.
5. Use the Organization List of Values (LOV) to check if the organization does not already exist in the database.
6. Enter the organization name.

7. Select a title for the contact.
8. Enter the contact's name.
9. If you wish to change the default relationship for the contact, then use the Relationship LOV to select a different one.
10. Enter the contact's primary phone number in four separate fields: the country code, the calling area code, the phone number itself, the extension if any.
11. Using the Type drop-down list, select the phone number type.
12. Enter the contact's email address.

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

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

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

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

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

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

- Enter details about the contact's organization

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

Guidelines

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

Entering a New Consumer

Use this procedure to enter a new consumer.

Prerequisites

Check to make sure the consumer does not already exist in the database to prevent duplicate entries.

Steps

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

You are now ready to:

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

Guidelines

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

Entering a New Organization

Use this procedure to create a new organization.

Prerequisites

None

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select Organization.
3. Use the Organization List of Values (LOV) to check if the organization does not already exist in the database.

> **Note:** To improve performance, your implementation may require you to enter one or more characters of the name you are searching for. In this case, the application displays an error message if you do not enter the required number of characters.

4. Enter the organization's name.
5. Enter the organization's primary phone number in four separate fields: the country code, the calling area code, the phone number itself, the extension if any.

6. Using the Type drop-down list, select the phone number type.
7. Enter the organization's primary email address.

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

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

You are now ready to:

- Enter other phone numbers, email, and URLs for the organization.
- Enter other details about the organization.

Entering the Marketing Source Code in the eBusiness Center

Use this procedure to enter the marketing source code for your customer. The source code can represent a marketing campaign, an offer, a promotion or other marketing activity. You must enter a source code before preparing quotes or launching scripts.

Prerequisites

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

Steps

1. Select the Overview tab.
2. If the caller does not know the source code name, then click **Search Source Code** and searching for the source code using the Universal Search window.
3. If the caller knows the source code name, then enter it using the Source Code List of Values.
4. Click **Save** on the toolbar or press CTRL+S on your keyboard.

Launching a Script for Your Customer Interaction

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

Prerequisites

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

Steps

1. In the eBusiness Center, select the Overview tab.
2. If the caller knows the name of the source code, then enter it using the Source Code List of Values.
3. If the caller does not know the source code name, then click **Search Source Code** and search for the marketing source code using other criteria, such as the source code name or the medium where the promotion is run.
4. If the View Script button is enabled, click on it to launch the script.
5. If the View Script button is disabled, this means no specific script has been associated with this source code. In this case, you may wish to view a list of all of the available scripts:
   a. Click **All Scripts**.

      The Agent Scripts window appears.
   b. If an appropriate script is available, then select the script and click **View Script** to launch the script.
   c. If no appropriate script is listed, then click **Close**.

Creating a Note Using the Universal Search Window

Use this procedure to create a note for an object using the Universal Search window. An object can be a consumer (party of Person), an organization (party of Organization), a business contact (party of Relationship), a lead, or an opportunity.

Prerequisites

None

Steps

1. Search for the object using the Universal Search window.
2. Select the object in the list.
3. Click **View Notes**.

   The View Notes window appears.
4. Click **New**.
5. Enter the note in the Note text box.
6. If you wish to make this note viewable by everyone in the organization who has permission to access to the object, then make sure the Public check box is selected.
7. If you wish to make this note private and therefore invisible to others in your organization, then deselect the Public check box and select the Private check box.
8. Click **Save** on the toolbar.

   The note is automatically linked to the object you are viewing and contains information about the note creator and date and time the note was created.

   If you wish the note to be visible from other objects within Oracle TeleSales, then you must relate the note to those objects. See Relating a Note to Other Objects for more details.
9. If you wish to create a second note, then:
   a. Place your cursor in the Note text box again.
   b. Click **New** in the toolbar. This is the button with a green plus sign.
   c. Enter the note and click **Save**.

Creating a Note Using the Notes Tab

Use this procedure to create a note on the Notes tabs which appear in the eBusiness Center, Lead Center, and Opportunity Center.

Prerequisites

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

Steps

1. If you wish to enter a note on the party you have selected in the eBusiness Center using one of the View Details For radio buttons, then select the Notes tab in the eBusiness Center.
2. If you wish to create a note for a lead, then:
   a. On the Lead tab, select the lead.
   a. Click **Details**.

      The Lead Center window appears displaying the lead details.
   b. Select the Notes tab.
3. If you wish to create a note for an opportunity, then:
   a. On the Opportunity tab, select the opportunity.
   b. Click **Details**.

      The Opportunity Center window appears displaying the details of the opportunity.
   c. Select the Notes tab.
4. Click **New**.
5. Enter the note in the Note text box.
6. If you wish to make this note viewable by everyone in the organization who has permission to access to the object, then make sure the Public check box is selected.
7. If you wish to make this note private and therefore invisible to others in your organization, then deselect the Public check box and select the Private check box.
8. Click **Save** on the toolbar.

   The note is automatically linked to the object you are viewing and contains information about the note creator and date and time the note was created.

   If you wish the note to be visible from other objects within Oracle TeleSales, then you must relate the note to those objects. See Relating a Note to Other Objects for more details.
9. If you wish to create a second note, then:
   a. Place your cursor in the New Note text box.

b. Click **New** in the toolbar. This is the button with a green plus sign.

c. Enter the note and click **Save**.

Guidelines

The note you create is automatically linked to the object where you create it:

- If you are viewing a lead in the Lead Center or the Lead tab of the eBusiness Center, then the note is linked to that lead.
- If you are viewing an opportunity in the Opportunity Center, then the note is linked to that opportunity.
- If you are viewing a contact at an organization in the eBusiness Center, than the lead is related to both the party type of relationship and the party type of Organization.
- If you are viewing a consumer, then the lead is linked to that individual. In the Related to field, the term used is "Person" because in the customer model this is the party of Person.

References

About Notes

Relating a Note to Other Objects

Creating a note relates that note to the object where you created it. For example, a note you create on the Note tab of the Lead Center is automatically linked to the lead you are viewing. Use this procedure to relate the note to additional objects.

Prerequisites

You must display the note you wish to relate to other objects in the Notes tab or in the View Notes window.

Steps

1. On the Notes tab or the View Notes window, click **Related to**.

   The Related to window appears.

2. Use the Related to List of Values (LOV) to select the type of object you wish to relate the note to.

   - Relationship (the organizational contact)

- Organization (the organization itself)
- Person (the consumer)
- Opportunity
- Lead

3. Use the Name LOV to select the object.
   - When the type you selected is Relationship, then the Name LOV contains a list of other contacts at the organization, or, for consumers, persons with a relationship to the consumer displayed in the eBusiness Center. The names are a concatenation of the contact first and last name and the organizational name, if any.
   - When the type you selected is Organization, then the Name LOV contains the names of any organizations that have an established relationship with the organization or person.
   - When the type you selected is Opportunity, then the Name LOV contains the names of the opportunities for the organization or consumer. The name is a free text description of the opportunity entered in the Opportunity Name field concatenated with the opportunity number.
   - When the type you selected is Lead, then the Name LOV contains all the lead names for the organization or person. The lead name is the free text description of the opportunity entered in the Lead Name field.
4. If you wish to relate the note to another object, then repeat the above procedure.
5. Click **OK**.

Viewing Notes

You can view notes entered on a consumer (party of Person), an organization (party of Organization), a business contact (party of Relationship), a lead, and an opportunity in one of two ways:

- By finding the object Using the Universal Search window and clicking **View Notes**.
- By using the Notes tabs in the eBusiness Center, Lead Center, and Opportunity Center.

Viewing a Note Using the Universal Search Window

Use this procedure to view notes for an object using the Universal Search window. An object can be a consumer (party of Person), an organization (party of Organization), a business contact (party of Relationship), a lead, or an opportunity.

Prerequisites

None

Steps

1. Search for the object using the Universal Search window.
2. Select the object in the list.
3. Click **View Notes**.

   The View Notes window appears listing the last month of notes.

   Because they appear in a dynamic table, you can sort the notes by any of the columns. See Manipulating Data in Your Work Queue and Other Dynamic Tables.
4. If you wish to change the date range of notes displayed, then:
   a. Enter the date range in the View Notes From and To fields.
   b. Click **Display**.

      A new list of notes appears for the date range you selected.
5. To view a note you can place your cursor over the Note field in the list, or you can select the note in the list to display the text on the right.
6. If you wish to view the full text of all of the notes in a continuous list, then:
   a. Click **Summary**.

      The first page of notes displays in the Notes Summary window.
   b. Click **Next** to display more notes.

References

Searching for Text Within Notes

About Notes

View Notes using the Notes Tab

Use this procedure to view notes for a consumer (party of Person), an organization (party of Organization), a business contact (party of Relationship), a lead, or an opportunity.

Prerequisites

You must have view access to the object the note is related to. To view a note on a lead, for example, you must have access to that lead.

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

Steps

1. If you wish to view notes on the party you have selected in the eBusiness Center using one of the View Details For radio buttons, then select the Notes tab in the eBusiness Center.
2. If you wish to view notes for a lead, then:
   a. On the Lead tab, select the lead.
   a. Click **Details**.

      The Lead Center window appears displaying the lead details.
   b. Select the Notes tab.
3. If you wish to view notes for an opportunity, then:
   a. On the Opportunity tab, select the opportunity.
   b. Click **Details**.

      The Opportunity Center window appears displaying the details of the opportunity.
   c. Select the Notes tab.

The Notes tab lists notes entered in the last month for that object type are listed in the dynamic table on the left.

4. If you wish to change the date range of notes displayed, then:
   a. Enter the date range in the View Notes From and To fields.
   b. Click **Display**.

A new list of notes appears for the date range you selected.

5. To view a note you can place your cursor over the Note field in the list, or you can select the note in the list to display the text on the right.
6. If you wish to view the full text of all of the notes in a continuous list, then:
   a. Click **All Notes**.

      The first page of notes displays in the Notes Summary window.
   b. Click **Next** to display more notes.

References

Searching for Text Within Notes

About Notes

Searching for Text Within Notes

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

Prerequisites

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

Steps

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

   The application highlights the record containing the first instance of your search term.
6. You can click **Cancel** to stop a long running search.

References

About Notes

Viewing Interactions

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

Prerequisites

You must display the party in the eBusiness Center header.

Steps

1. In the eBusiness Center, select a radio button in the View Details For region corresponding to the party you wish to view interactions for.
2. Select the Overview tab.
3. Enter a date range in the View Interactions From and To fields.
4. Click **Display**.

   The tab displays the interactions for the party for the date range you provided. The interactions are organized by date. You must open each date node by clicking on the + sign to reveal the interaction records for the date.

   The Doc# field provides the unique identifier for the interaction. For example, if the interaction involved an opportunity, then the identifier represents the opportunity number.

   The Handler field displays the eBusiness Suite application where the interaction occurred.

   You may have to scroll over to view the User Name, the name of the user who had the interaction with the customer.
5. If you wish to view the database record linked to the interaction, then double-click anywhere in the interaction. This launches the record in the eBusiness Suite application where it was created.
6. If you wish to view all of interactions for the party, then click **All Interactions**. See Interaction History documentation in *Oracle CRM Foundation Concepts and Procedures* for details.

Viewing What Marketing Activities are Targeted to Your Customer

Customers may have a wide range of promotions targeted at them at the same time but they may be aware of only one. Use this procedure to view the range of marketing activities targeted to your customer.

Prerequisites

You must display the party in the eBusiness Center header.

Steps

1. In the eBusiness Center, select a radio button in the View Details For region corresponding to the party you wish to view interactions for.
2. Select the Overview tab.
3. If no marketing activity appears in the Source Code field, enter the marketing source code associated with the call.
4. Other marketing activities are listed in the Targeted Source Codes region on the left side of the tab.
5. If you wish to view the details of any of the marketing activities in this list, then:
    a. Select the activity.
    b. Click **Details**.

Entering an Address

Use this procedure to enter an address on the Address/Phone tab of the eBusiness Center.

Prerequisites

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

Steps

1. Navigate to the eBusiness Center.
2. Follow one of the procedures for entering addresses for organizations, consumers and contacts for an organization are slightly different, so select the appropriate party below:

- Contact at an organization.
- Consumer
- Organization

3. Select the uses for the address, such as billing and shipping.

Entering an Address for a Contact at an Organization

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

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

Prerequisites

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

Steps

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

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

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

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

3. Select the Address/Phone tab.
4. In a blank line, enter the street address in the Address 1 field.

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

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

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

Guidelines

> **Note:** By default, an address you enter for a contact at an organization (party of type Party Relationship) automatically becomes an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. This feature can be turned off by your application administrator by resetting the profile option OTS: Associate Relationship Location To Organization to No.

Entering an Address for an Organization

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

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

   ---

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

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

   ---

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

Entering an Address for a Consumer

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

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

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

7. Specify the different uses using the Address Usage column. A single address can have multiple uses, as the shipping and billing address, for example:
   a. Use the Address Usage field LOV to specify a use for this address.

b. For specify additional uses, select a new line and repeat the previous step.

Specifying Uses for an Address

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

Prerequisites

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

Steps

1. Select the Address / Phone tab.
2. Select the address. You can do so by either clicking in any address field or on the select button all the way to the left.
3. Place the cursor in a blank Address Type field (located on the right of the tab) and use the List of Values specify a use for this address.
4. If the address is the primary address for that Address Type, select the Primary check box. If this check box is not visible, scroll to the right using the scroll bar at the bottom of Address Type column.

   You must select this check box only if you have specified more than one address for a specific type. For example, if you specified ten addresses to be the billing addresses for an organization, then you must select one of these as the primary billing address. Designating an address to be primary means that this address is automatically defaulted whenever you enter an address for that type. For example, the billing address designated as primary is the one that will show up by default on a customer invoice.

   Note: A primary designation for an address type is not the same as the primary address for a party.

5. Repeat the last step for any additional uses for this address. A single address can have multiple entries in the Address Type column.
6. Click **Save** on the toolbar.

Guidelines

See About the Address/Phone Tab for more information.

Indicating an Address is No Longer Used for a Purpose

Use this procedure to delete the use of an address by making an address type inactive. You will want to use this procedure to indicate an address is no longer used as a shipping address.

Prerequisites

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

Steps

1. Select the Address/Phone tab.
2. Select the address you wish to modify. You can do so by either clicking in any address field or on the select button all the way to the left.
3. If you wish to delete a use for this address, for example, if you want to indicate an address is no longer the shipping address, then:
   a. Scroll using the scroll bar under the Address Type field to view the Active check box.
   b. Deselect the Active check box.

      Note: The current version of Oracle TeleSales automatically enters today's date as the end date after you deselect the Active check box and vice versa. However, entering a future date as the end date, does not automatically make the information inactive after that date.

      ---

   c. Click **Save**.
4. If you wish to add additional uses for this address, then follow the procedure described in Specifying Uses for an Address

Guidelines

See About the Address/Phone Tab and About Deleting and Modifying Information in Oracle TeleSales for more information.

Deleting an Address by Making It Inactive

You cannot delete an address because other types of information, including leads and opportunities, may depend on it. But you can either edit the address or effectively remove it from use by deselecting the Active check box. Making an address inactive means that it is no longer visible to other users, unless these users specify that they wish to view inactive addresses.

Prerequisites

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

Steps

1. Select the Address / Phone tab.
2. Select the address. You can do so by either clicking in any address field or on the select button all the way to the left.
3. Deselect the Active check box next to the address.
4. Click **Save**.

> **Note:** The current version of Oracle TeleSales automatically enters today's date as the end date after you deselect the Active check box and vice versa. However, entering a future date as the end date, does not automatically make the information inactive after that date.

Guidelines

See About Deleting and Modifying Information in Oracle TeleSales for more information.

Entering Phone, Email, and URLs

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. In the View Details For region, select the radio button corresponding to the party you are entering information for. For example, if you are entering a private phone, then select the first radio button from the left which is labeled with the individual’s name. If you are entering a number for a contact at an organization, then select the third button from the left, the one labeled with the name of the person and the organization.

   > **Note:** Some of the radio buttons may be disabled depending on the party displayed in the header.

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

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

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

Note: A consumer can have only one primary email address.

---

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

Note: A consumer can have only one primary URL.

---

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

Viewing Contact Points and Restrictions for an Address

Use this procedure to view the contact points for an address you are viewing using the eBusiness Center tabs and any restrictions placed on that party.

Prerequisites

Display the party in the eBusiness Center header and select the party using one of the View Details For region buttons.

This feature is available in the Address/Phone and Relationship tabs, wherever the contact points button is visible. This button contains a page of an address book with green check marks and a hand with a pen as shown below:

Steps

1. Navigate to the Contact Points window.
2. If you wish to view the phone numbers, URLs, emails and other contact points for the party you are viewing, then select Contact Points from the drop-down list.
3. If you wish to view restrictions for the party, then select Restrictions from the drop-down list.

Using the Person Details Window

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

- Entering details about a person’s educational background
- Entering details about a person’s product interest
- Entering details about a person’s employment and military history
- Entering details about a person’s personal interests
- Specifying a sales team for a consumer
- Classifying a person

Classifying a Person

Use this procedure to classify a consumer or an organizational contact according to your organization's classification scheme. You can classify a single person in multiple ways. You can use the seeded the U.S. government’s Standard Industrial Classification (SIC) code, for example.

Prerequisites

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

Steps

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

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

   ---

2. Select the Person tab.
3. Click **Details**.

   The Person Details window appears.
4. Select the Party Classification tab.
5. For each classification:

   a. Click **New**.

b. Use the Class Category List of Values (LOV) to enter a classification category. This entry changes the available classifications in the next step.

c. Use the Class Code LOV to enter a classification.

d. Enter a date in the Start Date Active if different from today's date.

e. Optionally, enter an end date.

f. Optionally, enter a rank. This field is a free-text field.

g. If this classification is the primary classification for this individual, then select the Primary Flag. You can only select one classification as the primary classification.

6. Click **Save** on the toolbar.

Entering Details About a Person's Educational Background

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

Prerequisites

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

Steps

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

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

2. Select **Person** tab.
3. Click **Details**.

   The Person Details window appears.

4. Select the Education tab.
5. You can enter multiple schools and courses of study. For each entry:

   a. Place your cursor in the School field.

b. Click **New**.

c. Enter the school name and other details about the individual's education in the fields provided.

d. Click **Save** on the toolbar.

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

---

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

Entering Details About a Person's Product Interest

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

Prerequisites

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

Steps

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

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

---

2. Select **Person** tab.

3. Click **Details**.

   The Person Details window appears.

4. Select the Product Interest tab.

5. You can enter multiple product interests. For each entry:

   a. Place your cursor in the Type, Primary, or Secondary fields.

b. Click **New**.

c. Enter the product interest using the List of Values provided.

d. Click **Save** on the toolbar.

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

---

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

Entering Details About a Person’s Employment and Military History

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

Prerequisites

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

Steps

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

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

---

2. Select **Person** tab.
3. Click **Details**.

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

   a. Place your cursor in any of the entry fields in the bottom half of the tab.

b. Click **New**.

c. Enter the job or military history in the fields provided.

d. Click **Save** on the toolbar.

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

---

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

Entering Details About an Individual's Personal Interests

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

Prerequisites

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

Steps

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

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

---

2. Select **Person** tab.
3. Click **Details**.

   The Person Details window appears.
4. Select the Personal Interest tab.
5. You can enter multiple interests. For each entry:

   a. Place your cursor in any of the entry fields in the bottom half of the tab.

   b. Click **New**.

c. Enter the interests using the fields provided.

d. Click **Save** on the toolbar.

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

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

Specifying a Sales Team for a Consumer

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

Prerequisites

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

Steps

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

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

2. Select the Person tab.
3. Click **Details**.

   The Person Details window appears.

4. Select the Sales Team tab.
5. You can add multiple sales team members and partners to the sales team or a whole sales team:

a. If you wish to select a partner for the sales team, then, from the Display drop-down list, select Partner. The selection is Employee by default.

b. Place your cursor in the Name field. It does not matter if this field is blank or displays a name.

c. Click **New**.

d. Use the Name List of Values (LOV) to select a sales team member.

e. If you wish this individual to have view-only access to all opportunities and leads for this customer regardless of whether they are on the opportunity or lead sales team, then use the Role LOVs to select Account Manager.

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

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

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

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

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

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

Entering Name Pronunciation, Language, and Other Personal Details

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

Prerequisites

Display the organizational contact in the eBusiness Center header.

Steps

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

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

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

Guidelines

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

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

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

Restricting Interactions with Organizational Contacts

Use this procedure to restrict your organization's interactions via email or phone with organizational contacts. You may want to use this procedure if a contact is away on vacation, for example, or does not want to be contacted by telephone. The restrictions you place are for information only and must be enforced by your organizational procedures.

Prerequisites

Display the organizational contact in the eBusiness Center header.

Steps

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

   Note: This radio button is disabled if the header displays information on either the party type of Organization or Person.

2. Select the Person tab.
3. Click **Restrictions**.

   The Restrictions window opens.

4. Enter one or more restrictions on your company's interaction with the contact. For each restriction:

   a. Use the Restriction List of Values (LOV) to specify the type of contact you wish to restrict.

b. Enter a period for the restriction. If you do not enter an end date, then the restriction remains in effect indefinitely.

c. Use the Reason LOV to enter a reason.

5. Click **OK** when you are done.

Restricting Interactions with Consumers

Use this procedure to restrict your organization's interactions with consumers. You will want to use this procedure to indicate a person is away on vacation, for example, or does not want to be phoned at dinner time. The restrictions you place are for information only and must be enforced by your organizational procedures.

Prerequisites

Display the consumer in the eBusiness Center header.

Steps

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

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

---

2. Select the Person tab.
3. Click **Restrictions**.

   The Restrictions window opens.

4. Enter one or more restrictions on your company's interaction with the contact. For each restriction:

   a. Use the Restriction List of Values (LOV) to specify the type of contact you wish to restrict.

   b. Enter a period for the restriction. If you do not enter an end date, then the restriction remains in effect indefinitely.

   c. Use the Reason LOV to enter a reason.

5. Click **OK** when you are done.

Entering Phone, Email, and URL Information for an Organization

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

   ---

2. Select the Address / Phone tab.
3. At the bottom of the tab, use the Contact Method LOV select the information type that you wish to enter.
4. If you are entering a phone number, then:

   a. Use the Type LOV to select the phone type.

   b. Enter the phone number in the three Value fields: international code, area code, phone number. Be sure to use a standard format for your entries. Searches on phone numbers are sensitive to punctuation such as dashes or spaces.

   c. Enter an extension if any.

   d. Optionally, suggest a time this number can used by making entries in the Best Time From and Best Time To fields.

   e. If this phone number is the primary phone number which is to appear in the eBusiness Center header, then select the Primary check box.

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

   ---

5. If you are entering an email address, then:

   a. Enter the email in the last of the three Value fields.

b. If this email is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

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

6. If you are entering a URL, then:

   a. Enter the URL in the last of the three Value fields.

   b. If this URL is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

   Note: An organization can have only one primary URL.

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

Entering Revenue, Fiscal Year, and Other Organization Details

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

Prerequisites

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

Steps

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

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

2. Select the Organization tab.
3. In the Organization Focus region, enter information about the company. See the guidelines section below for information on specific fields.
4. Click **Save** on the toolbar.

5. If you wish to enter a sales team for the organization or classify the organization according to product interest, then click **Details** and follow the procedures for:
   - Classifying an organization by purchase interests
   - Selecting sales team members for an organization
   - Classifying the organization by SIC and other codes

Guidelines

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

Field/Box	Explanation
Alias	A free-text field where you can enter any other names this organization is known by.
Business Line	A free-text field for classifying the organization's line of business.
Customer Category	List of Values used to categorize the organization. This is specified by your implementation team.
Tax ID	Tax identification for the organization.
SIC Code	LOV to enter a Standard Industrial Classification (SIC) code. To enter additional SIC codes and other classifications to capture the whole range of business activities, click the Details button and follow the procedure for Classifying an Organization Using SIC and Other Codes
DUNS Number	Nine-digit Dun & Bradstreet number for the organization
Projected Revenue	Projected revenue for the organization
Rating	This is a read-only field
Internal radio button	Indicates the organization is an internal customer.
External radio button	Indicates the organization is an external customer.
Inactive	This check box must be unselected. Select this check box only to indicate the organization is no longer a customer or prospect
Prospect	This read-only check box is selected only if the organization has made a purchase.

Using the Organization Details Window

Use the Organization Details window, which is available by clicking **Details** in the eBusiness Center, to capture details about an organization. You can obtain help on the following topics:

- Viewing an organization's products under service contracts
- Classifying an organization by purchase interests
- Selecting sales team members for an organization
- Classifying an organization using SIC and other codes

Classifying an Organization Using SIC and Other Codes

Use this procedure to classify an organization according to your organization's classification scheme. You can apply multiple classifications to one organization. For example, you can apply multiple codes from the seeded the U.S. government's Standard Industrial Classification (SIC) to capture the whole range of areas where the organization does business.

Prerequisites

Display the organization in the eBusiness Center header

Steps

1. In the View Details For region, select a radio button labeled with the organization's name. This is the middle radio button.
2. Select **Organization** tab.
3. Click **Details**.

   The Organization Details window appears.
4. Select the Party Classification tab.
5. For each classification:

   a. Click **New**.

   b. Use the Class Category List of Values (LOV) to enter a classification category. This entry changes the available classifications in the next step.

   c. Use the Class Code LOV to enter a classification.

   d. Enter a date in the Start Date Active if different from today's date.

e. Optionally, enter an end date.

f. Optionally, enter a rank. This field is a free-text field.

g. If this classification is the primary classification for this individual, then select the Primary Flag. You can only select one classification as the primary classification.

6. Click **Save** on the toolbar.

Viewing an Organization's Products Under Service Contracts

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

Prerequisites

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

Steps

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

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

2. Select the Organization tab.
3. Click **Details**.

   The Organization Details window appears.

4. Select the Install Base tab to view the products under a service contract.

Classifying an Organization by Purchase Interests

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

Prerequisites

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

Steps

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

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

2. Select the Organization tab.
3. Click **Details**.

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

Selecting Sales Team Members for an Organization

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

Prerequisites

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

Steps

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

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

2. Select the Organization tab.
3. Click **Details**.

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

   a. If you wish to select a partner for the sales team, then, from the Display drop-down list, select Partner. The selection is Employee by default.

   b. Place your cursor in the Name field. It does not matter if this field is blank or displays a name.

   c. Click **New**.

   d. Use the Name List of Values (LOV) to select a sales team member.

   e. If you wish this individual to have view-only access to all opportunities and leads for this customer regardless of whether they are on the opportunity or lead sales team, then use the Role LOVs to assign the role of Account Manager.

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

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

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

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

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

Capturing a Relationship Between a Person and an Organization

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

Prerequisites

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

Steps

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

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

---

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

References

Understanding Relationships

Capturing a Relationship Between Two Organizations

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

Prerequisites

You must display one of the organizations or display a contact at one of the organizations in the eBusiness Center header.

Steps

1. In the View Details For region, select the radio button labeled with the name of one of the two organizations.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship of the organization to the second organization.
4. From the Object Type drop-down list, select Organization.
5. Use the Object Name List of Values to enter the second organization.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

References

Understanding Relationships

Capturing a Relationship Between Two People

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

Prerequisites

You must display one of the consumers or display one of the two organizational contacts in the eBusiness Center header.

Steps

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

2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship that person has to the second person. For example, "Is the manager of", "Is the spouse of" or "is the father of".
4. From the Object Type drop-down list, select Person.
5. Use the Object Name List of Values to enter the second person.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

Ending a Relationship Between a Person and an Organization

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

Prerequisites

You must display the contact in the eBusiness Center header.

Steps

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

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

   ---

2. Select the Relationship tab.
3. Select the relationship you wish to terminate.
4. Select the Inactive check box.
5. If you know the relationship has ended permanently, then enter a date in the End Date field.
6. Click **Save** on the toolbar.

Viewing Accounts a Customer Has with Your Organization

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

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

   The tab displays the accounts in a dynamic table.
4. If you wish to view the details of an account, then:
   a. Select the account in the table.
   b. Click **Details**.

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

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

Searching for a Lead Using Universal Search

Use this procedure to search for an lead using the Universal Search window and display it in the Lead Center.

You can search either by using the Quick Search tab, which is optimized for fast retrieval, or by using the Expanded Search tab. You cannot combine the two methods of searching.

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

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

Prerequisites

None

Steps

1. Click **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.

2. From the Search drop-down list, choose Lead.
3. If you wish to use one of the queries optimized for fast retrieval, then:
   a. On the Quick Search tab, select the radio button corresponding to the query you wish to use.
   b. Make entries in all fields.
4. If you wish to search using the expanded search, then:
   a. Select the Expanded Search tab.
   b. Enter search criteria in any of the fields in the Basic region.
   c. Enter search criteria in the Advanced region. This is done by selecting a search term using the Item List of Values (LOV), entering an operator using the Condition LOV, and entering the value of that condition in the Value field.

      For example, to search for opportunities worth more than $100,000, enter `Total Amount` for Item, > for the Condition and `100000` for the value.
5. If you wish to include inactive records in the search, then select the Include Inactive Records check box.
6. Click **Search**.

The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

7. If you wish to save the results of your search as a list, then follow the procedure in Creating a List.
8. If you wish to display a lead on the list, then:
   a. If you wish to view this item in a separate lead center window, then select the Multiple Lead Centers check box.
   b. If you wish to display one lead and close the window, then click **OK.**
   c. If you wish to display a lead but leave the search window open in the background so you can come back and select another lead from the list, then click **Apply**.

The application displays the lead in the Lead Center.

You can view all of the publicly accessible notes associated with the lead by clicking the View Notes button.

Guidelines

The Basic region of the Expanded Search allows you to search on:

- Customer
- Status
- Rank
- Time Frame
- Budget Status
- Budget Amount (header level)
- Lead Number
- Owner First Name (The owner of the lead is the employee who created the lead or the person who it is assigned to)
- Owner Last Name
- Creation Date From
- Creation Date To
- Urgent check box

The Advanced region of the Expanded Search allows you to search on:

- Project Name
- Lead Name
- Primary Contact First Name (The primary contact is a consumer or a contact at the organization the lead belong to)
- Primary Contact Last Name
- Channel
- Source Code
- Source Code Name
- Offer Code
- Budget Amount
- City
- State
- Province
- Country
- Qualified Flag
- Sales Person (Last name, First name)
- Flex Fields (These are special fields set up by your implementation team.)
- Contact Role
- Purchase Interest Type
- Purchase Interest Primary
- Purchase Interest Secondary
- Sales Group
- Include Inactive check box

Displaying a Lead in the eBusiness Center

Use this procedure to display a lead for an organization or a consumer in the eBusiness Center.

In this procedure you must find your lead in a list of leads displayed in Leads tab of the eBusiness Center. If you have a large number of leads to sort through or need to search on leads using specific criteria, then instead follow the procedure for Searching for a Lead Using the Universal Search Window.

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

   The leads that have been created for this person or organization, if any, are listed in the left side of the tab.
4. If you wish to view only open leads, then make sure the Display All radio button is not selected.
5. If you wish to view only leads where you are the owner, then select the Owner check box.
6. You can sort the leads in the table by any of the available fields by clicking on the field header. See Manipulating Data in the Work Queue and Other Dynamic Tables for more information.
7. Select the lead you wish to view or modify from the list. The basic information about the lead appears on the right side of the tab.
8. If you wish to view more details about the lead, then click **Details** to launch the Lead Center.

Guidelines

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

Creating a Lead in the eBusiness Center

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

   ---

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

   If you do not select the Qualified check box, the application checks to see if the lead is qualified ever time the lead is updated. If the application determines the lead is qualified, then this check box is selected automatically.

   The application qualifies a lead automatically if you or someone else on your sales team enters information in a set of fields determined by your implementation team. These include project name, time frame, and budget. To qualify a lead, the application looks to see only if an entry has been made in specified fields, it does not evaluate the quality of the lead.

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

    The application ranks the lead using a lead score card set up by your application administrator. For example, a time frame of 1-3 months receives more points than a time frame of 1 year. A budget of $1 million receives more points than a budget of $10,000.
12. Specify the sales channel. By default, this can be either direct or indirect.
13. If you entered the source code for the customer in the Overview tab, then the Source Code is prefilled. If you did not make the entry, then enter it now using the List of Values (LOV). If you do not know the source code name, then save your work and search for the source code using other criteria.
14. If you entered the offer in the Overview tab, then the Offer Code is prefilled. If you did not make the entry, then enter the offer now using the LOV.
15. Use the Time Frame LOV to enter a time frame in which you expect the lead to close.
16. Enter the budget status.
17. Enter an approximate budget for the lead.
18. If an organization has many locations, then enter a location for the lead.
19. If you wish to enter the lead purchase interests, including the quantity the customer wishes to purchase and the purchase amount, you can do so using the lists of values and fields on the bottom right hand side of the tab. You must scroll to see all of the fields available to you.
20. Optionally, use the Primary Contact LOV to enter the individual that will be the primary contact for this lead. For consumers, this field will default to the name of the consumer.
21. If you have entered a primary contact, then select a role for the contact using the Contact Role LOV.
22. Click **Save** on the toolbar.

23. If you wish to add other lead information, click **Details** to launch the Lead Center.

Guidelines

Note: In some implementations, it may be possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This may result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab in the Lead Center to over-ride territory assignment and prevent this from happening.

Viewing and Modifying Quotes

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

---

3. Select the Quote / Order tab.
4. From the View drop-down list, select Quotes.

   The tab displays the list of quotes.
5. Select a quote from the list.

6. Click **Details**.

   Oracle Quoting - Forms appears displaying the quote. Follow the procedures outlined in the Oracle Quoting - Forms documentation to modify quotes.

Viewing and Modifying Orders

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

3. Select the Quote / Order tab.
4. From the View drop-down list, select Orders.

   The tab displays the list of orders.
5. Select an order from the list.
6. Click **Details**.

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

Creating a Quote or an Order Without a Lead or Opportunity

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

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

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

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

Searching for an Event Using Multiple Search Criteria

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

Prerequisites

None

Steps

1. On the eBusiness Center Event tab, click **Search Events**.

   The Universal Search window opens.
2. Enter search criteria on the Basic tab.

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

---

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

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

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

Displaying an Event in the Event Tab

Use this procedure to display an event in eBusiness Center Event tab that is not already in the order you are creating. If you wish to display an event already in the order, then instead use the Added to Order arrow buttons at the top of the tab to navigate to it.

Prerequisites

None

Steps

1. Navigate to the Event tab.
2. If the Event tab already displays another event, then:

a. Place your cursor in the Source Code or Event Name fields.

b. Click **New** in the toolbar.

3. If you know the source code associated with the event, then use the List of Values (LOV) to enter it. Selecting a source code restricts the Event Name LOV and determines event pricing.

> **Note:** An event can be associated with multiple source codes offering customers different discounts. If you wish to explore different pricing options that may be offered by different source codes, then leave the source code field blank.

4. If you know at least a partial name of the event, then use the Event Name LOV to enter it.

5. If you do not know the event name, or wish to search by some other criteria such as the date the event is being offered, then click **Search Events** to search for it.

   Basic information about the event displays in the Select Event region of the Event tab.

6. If you wish to view enrollment, availability and other information about the event, then click **Event Details**. For more information see using the Event Details Window.

7. You are now ready to create the order.

References

About the Event tab.

Creating an Order to Enroll Individuals in Events

Use this procedure to create an order to enroll one or more individuals in one or more events. In one order, all enrollees must have a relationship set up in the database to the party displayed in the eBusiness Center header. For business contacts, this means all must belong to the same organization.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you are enrolling consumers, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you are enrolling contacts at an organization, then, In the View Details For region, select the radio button labeled with the name of the person and the organization. This is the third button from the left. If this button is disabled, you can also enroll contacts with the organization button selected.
3. Select the Event tab.
4. Add events and enrollees to your order.
5. Click **Review Order** and complete processing the order.

Adding an Event and Enrollees to Your Order

Use this procedure to add an event and enrollees to an order you are creating on the Event tab. You can only use this procedure to add an event to an order before you confirm the order.

Prerequisites

None

Steps

1. Display the event you wish to add to the order in the Event tab.
2. The Event tab automatically displays the name of the person displayed in the eBusiness Center header as the first enrollee. If you do not wish to enroll this person you can select a different individual.
3. Select the event collateral you wish to send to this enrollee:
   a. Select the Select check box next to the item you wish to send.
   b. If you are sending physical collateral you may be able to select an alternate shipping method using the Shipping Method List of Values (LOV).
   c. If you wish to send the collateral item to a different destination than the one displayed in the Send to field, then select it using the LOV.
4. Add additional enrollees to this event by clicking More Enrollees.
5. Click **Add to Order**.

6. After you have completed adding events to your order, you must click Review Order to complete the enrollment and send out confirmation emails.

Enrolling Additional People in an Event in Your Order

Use this procedure to select additional enrollees for an event in your order.

Prerequisites

The event displayed on the Event tab must already be added to your order. You can tell if the event is in the order when the middle button on the bottom right hand side of the Event tab is **Update Order**.

Steps

1. In the Event tab, click **More Enrollees**.

   The More Enrollees window appears.

2. For each enrollee you wish to add:

   a. Use the Enrollee Name List of Values (LOV) to enter the name.

   b. Select the check boxes for the collateral you wish this enrollee to receive.

   c. If you are sending physical collateral, you may be able to select alternate shipping methods.

3. Click **OK** when you are done.

Using the Enrollment Details Window

Use this window to view details about an event. Help is available on:

- Viewing detailed event information
- Viewing the roster for an event, enrollee status, and confirmation codes
- Recording attendance at an event

Viewing Detailed Event Information

Use this procedure to view detailed information about an event such as the agenda of the event, hotel and venue information, and directions. What information you can view depends on the information entered in Oracle Marketing Online.

Prerequisites

Display the event in the Event tab of the eBusiness Center.

Steps

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

   The Enrollment Details window appears.

2. From the View By drop-down list, select Information.

   The Available Event Information displays available types of information.

3. Select the type of information you wish to view to display it in the Description text box below.

4. Click **OK** or **Cancel** to exit.

References

Click here for a detailed overview of the Event tab.

Viewing the Event Roster and Enrollment Status

Use this procedure to view who is enrolled for an event and the status of their enrollment.

Prerequisites

Display the event in the Event tab of the eBusiness Center.

Steps

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

   The Enrollment Details window appears.

2. From the View By drop-down list, select Roster

   The window displays the list of enrollees with enrollment status, confirmation code for each.

3. Click **OK** or **Cancel** to exit.

Recording Attendance at an Event

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

Prerequisites

Display the event in the Event tab of the eBusiness Center.

Steps

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

   The Enrollment Details window appears.

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

Completing the Enrollment Process for an Order

Use this procedure to confirm an order to enroll individuals in events.

Prerequisites

You must first create the enrollment order on the Event tab of the eBusiness Center.

Steps

1. In the Event tab of the eBusiness Center, click **Review Order**.

   Note: If the Review Order button is disabled, this means that you have not added any events to the order.

   The Event Registration Review window appears listing the events and enrollees for your order and their status.

2. If the order requires payment, then:

   a. Select the payment type.

   b. Enter credit card or other information below.

   Note: To see the payment authorization code for credit cards, you must refresh the window. You can do this by closing and opening it again.

   ---

3. Click **Enroll**.

   The application adds the confirmation number and enrollment status to the enrollee information in the list above. For orders requiring payment, you do not get a confirmation number until the payment has been cleared.

References

Click here for a detailed overview of the Event tab.

Creating Contacts or Consumers

Use this procedure to create new consumers or organizational contacts. This procedure provides an alternate way of creating parties in your database and can be used only in tabs which enable the Actions menu. Use this method when you need a fast way of entering basic customer information for sending collateral, enrolling customers in events, and creating leads and opportunities.

Prerequisites

You can only access this method of creating new customers while you have the Collateral, Events, Lead, or Opportunity tabs selected.

Steps

1. Choose **New Contact** from the Actions menu.

   The Creation of Party window appears.

2. From the Party Type drop-down list, select the party type you are creating:

   - **Person**: to create a consumer.
   - **Party Relationship**: to create a contact at an organization.

3. If you are creating a contact at an organization, then the Organization field prefills automatically with the name of the organization.
4. Enter the individual’s name.
5. If you are creating a contact at an organization, then use the Relation List of Values (LOV) to enter a relationship. Usually this is "Contact".
6. Enter the person’s email address. You need this to send the confirmation email and electronic collateral.
7. Enter other contact information.
8. Click **OK**.

Using the Registration History Window

Use this window to view the status and history of enrollments for a customer or prospect and to adjust enrollment by cancelling, transferring the enrollment to another individual, or substituting a different enrollee.

Help is available on:

- Viewing enrollment history and status
- Adjusting enrollment by cancelling, transferring, and substituting

Viewing Enrollment History and Status

Use this procedure to view the enrollment history and status for a consumer, a contact at an organization, or for all the organization as a whole.

Note: You cannot view information relating to payments for events in this release.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you wish to view the enrollment history of a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.

2. If you wish to view the enrollment history of the whole organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to view the enrollment history of a specific contact at an organization, then, In the View Details For region, select the radio button labeled with the name of the person and the organization. This is the third button from the left.
4. Select the Event tab.
5. From the Actions menu, select **Registration History**.

   The Registration History window appears showing the enrollment history for the individual or organization you selected in View Details For.

   If you are viewing enrollment for a consumer, then the Customer field displays the name of the consumer and the Enrollee List of Values (LOV) contains the names of all of the individuals in the database that have an established relation with that consumer, if any.

   If you are viewing enrollment history for an organization or for contacts at an organization, then the Customer field displays the name of the organization and you can use the Enrollee LOV to select any of the contacts at that organization.
6. If you wish to view all of the enrollments for an organization, then make sure the Enrollee field is blank. If it is not, then clear the field by clicking **Clear Record** on the toolbar.
7. If you wish to view the enrollment history for a contact at an organization, then select the contact using the Enrollee LOV.
8. If you wish to view enrollment history for a consumer, then select the name of the consumer using the Enrollee LOV.
9. Click **Find**.

   The window displays the enrollee history for the party you selected. Each line represents one enrollment.

   The Primary Contact field displays the party which was displayed in the eBusiness Center header at the time the order was made.
10. Select the historical period you wish to view using the View List drop-down list.
11. Select an enrollment line to view its status and other details in the Enrollee Information region below.

An Enrollee Status status of Registered means the individual is registered for the event. If the event requires payment, then the payment has been confirmed.

The Primary Contact field displays the party who made the enrollment order. The Enrollee Name displays the actual person enrolled.

12. If you wish to adjust any enrollment, then:
    a. Select the enrollment line you wish to adjust.
    b. Click **Adjust Enrollment** and follow the procedure described in Adjusting Enrollment by Cancelling, Transferring, and Substituting.
13. Click **Cancel** when you are done reviewing event history.

References

Click here for a detailed overview of the Event tab.

Adjusting Enrollment by Cancelling, Transferring, and Substituting

Use this procedure to adjust enrollment by cancelling the enrollment, transferring the enrollment to a different individual, or by substituting a different enrollee.

Note: For paid events, adjusting an enrollment by cancelling, transferring or substituting does not adjust the original payment for the enrollment.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. View the enrollment history for the individual whose enrollment you wish to adjust.
2. In the Registration History window, Select the enrollment line you wish to adjust.
3. Click **Adjust Enrollment**.

   The Adjust Enrollment window appears.
4. If you wish to cancel enrollment, then:

   a. Select the **Cancel** radio button.
   b. Select a reason from the Cancellation Reason drop-down list.
5. If you wish to transfer the enrollment of this individual to another event, then
   a. Select the **Transfer** radio button.
   b. Use the Event Name List of Values (LOV) to select an alternate event.
6. If you wish to substitute a different individual as the enrollee, then:
   a. Select the **Substitute** radio button.
   b. Select the name of the substitute using the Enrollee Name LOV.
7. Click **OK**.

Searching for Collateral Using the Universal Search Window

Use this procedure to search for collateral using the Universal Search window and display it in the eBusiness Center.

You can search either by using the Quick Search tab, which is optimized for fast retrieval, or by using the Expanded Search tab. You cannot combine the two methods of searching.

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

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

Prerequisites

None

Steps

1. Click **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.
2. From the Search drop-down list, choose Collateral.

3. If you wish to use one of the queries optimized for fast retrieval, then:
   a. On the Quick Search tab, select the radio button corresponding to the query you wish to use.
   b. Make entries in all fields.
4. If you wish to search using the expanded search, then:
   a. Select the Expanded Search tab.
   b. Enter search criteria in any of the fields in the Basic region.
   c. Enter search criteria in the Advanced region. This is done by selecting a search term using the Item List of Values (LOV), entering an operator using the Condition LOV, and entering the value of that condition in the Value field.

      For example, to search for collateral where the available quantity is more than 100 pieces, enter `Qty Avail` for Item, > for the Condition and `100` for the value.
5. If you wish to include inactive records in the search, then select the Include Inactive Records check box.
6. Click **Search**.

   The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.
7. If you wish to save the results of your search as a list, then follow the procedure in Creating a List.
8. If you wish to display a collateral item on the list, then:
   a. If you wish to view this item in a separate eBusiness Center window, then select the Multiple eBusiness Centers check box.
   b. If you wish to display one collateral item and close the window, then click **OK.**
   c. If you wish to display a collateral item but leave the search window open in the background so you can come back and select another collateral item from the list, then click **Apply**.

The application displays the collateral in the eBusiness Center.

Guidelines

The Basic region of the Expanded Search allows you to search on:

- Collateral Name
- Source Code Name
- Source Code
- Release Date: Start (Available From)
- End date (Available To)

The Advanced region of the Expanded Search allows you to search on:

- Qty Avail (the quantity available for physical collateral)
- UOM (units of measure)
- Any flex fields set up by your organization
- Language
- Include Inactive

Preparing a Collateral Order for One or More Recipients

Use this procedure to prepare an order to email, fax, or mail one or more pieces of collateral to consumers or organizational contacts related to the party in the eBusiness Center header.

While you can select multiple recipients for each piece of collateral in the order, the choice of recipients is restricted by the party you are viewing in the eBusiness Center header and the View Details For radio button you have selected:

- If you are requesting collateral to be sent to consumers, you can only select recipients that have an established relationship with the consumer displayed in the header.
- If you are sending the collateral to contacts at an organization, then you can only select recipients who are contacts at that one organization.

Prerequisites

Display the party you are speaking to in the eBusiness Center header.

Steps

1. If you are sending collateral to a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to send collateral to one or more recipients at an organization, then, In the View Details For region, select either the radio button labeled with the name of the organization or the organizational contact.

   > **Note:** You are restricted to sending collateral to one organization in any one order.

3. Select the Collateral tab if it is not already selected.
4. For each piece of collateral you wish to add to the order:
   a. Select the collateral.

      The party you have entered in the header of the eBusiness Center, automatically appears as the first recipient.

   b. If you do not wish to send collateral to this person, then select a different individual.
   c. If you are sending physical collateral to this recipient, then enter the quantity you wish to send.
   d. Select any additional recipients and, for physical collateral, the number of copies they are to receive.
   e. If you are sending or faxing electronic collateral, then select a confirmation letter using the Cover Letter LOV. A confirmation letter is either an email or a fax cover sheet. Recipients receive a separate confirmation letter with each piece of collateral.
   f. Click **Add to Order**.
5. When you have completed adding collateral items and recipients, click **Review Order** and complete the order creation procedure by clicking **Send Request**. You must complete this last step for your order to be processed.

The collateral order is processed on a schedule set up by your organization.

You can check if the collateral order has been fulfilled by choosing Collateral History from the Actions menu.

References

About Collateral

About the Collateral Tab

Adding Collateral to an Order

Use this procedure to select collateral for an order you are creating on the Collateral tab of the eBusiness Center.

Prerequisites

To add collateral to an order you must be in the process of preparing a collateral order on the Collateral tab.

Steps

1. If you know the source code the collateral is associated with, then select a source code using the Source Code List of Values (LOV) in the Select Collateral region of the Collateral tab.

   The source code is prefilled if you made an entry in the Overview tab.

   Selecting a source code restricts the number of collateral available in the Collateral Name LOV.

2. If you know the name of the collateral you wish to send, then use the Collateral Name LOV to select it.

3. If you do not know the collateral name you wish to send, then click **Search** to search for it.

   The left side of the Select Collateral region displays basic information about the collateral.

Note: Quantity Available and Back Order fields are reserved for future functionality.

You are now ready to select the recipients and, for physical collateral, the number of copies they are to receive.

Selecting Additional Collateral Recipients

Use this procedure to select additional collateral recipients to an order you are creating in the Collateral tab.

Prerequisites

- To select recipients you must be in the process of preparing an order on the Collateral tab.
- The recipients must be created first and must have a relationship to the party displayed in the eBusiness Center header before you can select them. This means that in any single order you can only send collateral to contacts at the same organization or, if you are sending contacts to consumers, you can send collateral only to individuals who have established relationships with the consumer displayed in the eBusiness Center header.

> **Note:** After you confirm an order by clicking the Send Request button on the Collateral Request Confirmation window, you cannot modify it.

Steps

1. If the collateral item is not displayed in the Collateral tab, then navigate to that item using the Added to Order arrow buttons or add the item to the order.

   The party you have entered in the header of the eBusiness Center, automatically appears as the first recipient. If you do not wish to send collateral to this person you can select a different individual.

2. Enter the individuals who are to receive the collateral on separate lines. For each person:

   a. If you are sending physical collateral, then enter the quantity of the collateral you wish to send to that individual. For electronic collateral, this field is disabled.

   b. In the Recipient field, use the List of Values (LOV) to select the name of the recipient.

Note: If the recipient is not listed in the LOV, then create the contact by selecting New Contact from the Actions menu. See the procedure described in Creating Contacts or Consumers for Event Enrollment or Collateral Shipment.

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c. If you are sending physical collateral, then your organization's preferred shipping method is filled in automatically. You can use the Shipping method LOV to select an alternate shipping method.

d. If you are sending electronic collateral, then the method of delivery is either email or fax. Depending on your implementation, you may be able to change the default delivery method using the Shipping method LOV.

e. Depending on the type of shipping method you selected, the individual's primary street address, email address, or fax number appears automatically in the Sent to field. You can select an alternate destination using the Sent to LOV.

Note: If the LOV contains incorrect information or no address, email, or fax number appears, you must enter the correct information on other tabs of the eBusiness Center.

---

3. Click **Add to Order**.

References

About Collateral

About the Collateral Tab

Modifying a Collateral Order

Use this procedure to modify an order you have created.

Prerequisites

You must be in the process of preparing an order on the Collateral tab. You cannot modify an order once you have committed it using the Send Request button.

Steps

1. If you wish to modify individual items in the order, then:

   a. Navigate to the item you wish to modify using the Added to Order arrow buttons located at the top left hand side of the Collateral tab.

   - If you wish to replace this item with another, then:

     * If you know the name of the new item, then select it using the Collateral Name List of Values (LOV).

       Changing the source code in the Source Code field will give you a different list of collateral to select from. Deleting any entry in the Source Code field displays all available collateral in Collateral Name LOV.

     * If you do not know the name, use the search function to search for it.

   - For physical collateral, you can modify the quantity you wish to send to any recipient by entering a different quantity.

   - You can modify the shipping method for any recipient. For electronic collateral shipping methods are restricted to either fax or email.

   - If you wish to remove a recipient from the order, then place your cursor in the recipient's name and click **Clear Record** in the toolbar.

   - Add any additional recipients and, for physical collateral, the number of copies they are to receive.

2. Click **Update Order**.

3. You can add additional collateral and recipients to the order.

4. When you have completed modifying the order, click **Review Order** and complete the order creation procedure by clicking **Send Request**. You must complete this last step for your order to be processed.

The collateral order is processed on a schedule set up by your organization.

You can check if the collateral order has been fulfilled by choosing Collateral History from the Actions menu.

Requesting Your Collateral Order to Be Sent

Use this procedure to request delivery of a collateral order you have prepared in the Collateral tab of the eBusiness Center. This procedure only requests the order to be sent. It is up to the individual fulfillment services to ensure they are.

Prerequisites

Prepare the collateral order in the Collateral tab.

Steps

1. On the Collateral tab of the eBusiness Center, click **Review Order**.

   The Collateral Request Confirmation window appears.

2. If you wish to remove or modify any item in the order, then click **Close** to return to the Collateral tab where you can make your changes.

3. Click **Send Request.**

   Your request is submitted for processing. You can check the Collateral History window, available by choosing Collateral History from the Actions Menu, to view the status of your request. The order is fulfilled when the status is Sent.

Viewing Collateral Order History and Order Status

Use this procedure to view the status of individual collateral items in collateral orders that have been submitted for delivery.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you wish to view collateral orders for a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first radio button from the left.

   > **Note:** This button is disabled if you are viewing an organization in the eBusiness Center header.

2. If you wish to view collateral orders for an entire organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second radio button from the left.

   > **Note:** This button is disabled if you are viewing a consumer in the eBusiness Center header.

3. If you wish to view the collateral orders sent individual contacts at an organization, then, In the View Details For region, select the radio button labeled with the name of one the contacts and the organization. This is the third button from the left.

> **Note:** This button is disabled if you are viewing an organization or a consumer in the eBusiness Center header.

4. Select the Collateral tab if it is not already selected.
5. Choose Collateral History from the Actions menu.

   The Collateral History window appears.

   If you are viewing consumer collateral orders, then the Customer field displays the name of the consumer and the Recipient List of Values (LOV) contains the names of all of the individuals in the database that have an established relation with that consumer.

   If you are viewing collateral orders for an organization or contacts at an organization, then the Customer field displays the name of the organization and the Recipient LOV allows you to select all contacts at that organization.
6. If you wish to view all of the collateral orders for an organization then make sure the Recipient field is blank. If it is not, then you can clear the field by clicking the Clear Record button on the toolbar.
7. If you wish to view collateral orders for a contact at an organization, then select the contact using the Recipient LOV.
8. If you wish to view collateral orders for a consumer, then select the name of the consumer using the Recipient LOV.
9. Click **Find**.

   The window displays a history of collateral orders made for the party.

   Each line represents one collateral item and one recipient. This means that if you are sending the same item to five different individuals, this item appears listed five times with each recipient’s name.

   The Primary Contact field displays the party which was displayed in the eBusiness Center header at the time the order was made.
10. Select a collateral item to view more details about it in the Request Information region below.

11. If an item has the Request Status of delivered, this means that the item was sent out to the recipient.
12. Click **OK** to close the window.

Viewing Tasks Assigned for a Consumer, an Organization, or a Contact

Use this procedure to view all of the tasks assigned to agents regarding a consumer, an organization, or an organizational contact. If you wish to view tasks assigned to you, then use the work queue instead.

Prerequisites

Display the party you wish to create a task for in the eBusiness Center header.

Steps

1. If you wish to view the tasks relating to a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to view the tasks relating to an organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to view the tasks relating to a contact at an organization, then, In the View Details For region, select the radio button labeled with the names of the contact and the organization. This is the third button from the left.
4. Select the Task tab.
5. The tasks associated with this party are listed on the left.
6. Selecting the Display All check box, lists both open and closed tasks.
7. If you wish to view only private tasks, then select the Private check box.
8. Select a task on the list to view its details on the right.
9. If you wish to see further details, then click **Details**.

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

Creating a Task for a Consumer, an Organization, or a Contact

Use this procedure to create a task for a consumer, an organization, or an organizational contact. The task you create will appear in the Work Queue of the individual you assign as the owner of the task.

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

Prerequisites

Display the party you wish to create a task for in the eBusiness Center header.

Steps

1. If you wish to create a task for a consumer, then, In the View Details For region, select the radio button labeled with the name of the consumer. This is the first button from the left.
2. If you wish to create a task for an organization, then, In the View Details For region, select the radio button labeled with the name of the organization. This is the second button from the left.
3. If you wish to create a task for a contact at an organization, then, In the View Details For region, select the radio button labeled with the names of the contact and the organization. This is the third button from the left.
4. In the Task tab, click **New**.
5. Use the Lists of Values (LOVs) to enter the task type and priority.
6. Enter a name for the task in the Name field.
7. Enter a date you wish this task to be performed in the Planned Start field.
8. In Owner, use the LOV to enter the person who is being assigned this task.

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

9. Enter a description.
10. If you wish to keep this task private, then select the Private check box.

11. Click **Save** on the toolbar.

Using the Lead Center

Use the Lead Center to manage leads for your customers.

You can obtain help on the following:

- Displaying a customer in the Lead Center
- Displaying a lead in the Lead Center
- Creating a lead in the Lead Center
- Entering purchase interests, contacts, and other details for a lead
- Viewing opportunities created from a lead
- Viewing opportunities created from a lead
- Qualifying a lead
- Turning a lead into an opportunity
- Checking for duplicates when creating an opportunity from a lead
- Entering notes on a lead
- Viewing lead notes
- Accepting a lead assigned to you
- Refusing a lead assigned to you
- Assigning a lead to someone else
- Select individuals and sales groups for the lead sales team

Displaying a Customer in the Lead Center

Use this procedure to display a customer in the Lead Center.

Prerequisites

Your customer, an organization or a consumer, must already exist in the database.

Steps

1. Navigate to the Lead Center

2. From the Party Type drop-down list choose either Organization or Person (consumer).
3. Use the Customer field List of Values to enter the organization or consumer name.

Displaying a Lead in the Lead Center

You can display a lead in the Lead Center in a number of ways. These include:

- Search for the lead using the Universal Search window
- Display the lead in the eBusiness Center first and then click **Details** to open the Lead Center.
- Double click on a lead listed in the Universal Work Queue.
- Navigate to the lead from the opportunity summary in the Dashboard tab of the eBusiness Center.

Creating a Lead in the Lead Center

Use this procedure to create a lead for an organization or a consumer in the Lead Center.

Prerequisites

None

Steps

1. Navigate to the Lead Center
2. Click **New**.
3. From the Party Type drop-down list choose either Organization or Person (consumer).
4. Use the Customer field List of Values to enter the organization or consumer name.
5. Use the Primary Contact List of Values (LOV) to enter the individual that will be the primary contact for this lead. For consumers, this field will default to the name of the consumer.
6. Enter a unique name in the Lead Name text field.

7. Enter a name of the project. The name you enter in this free-text field is also used as the project name for any opportunity you create from this lead.
8. Optionally, enter the address for the project using the Location LOV.
9. Optionally, enter a source code this lead is related to using the Source Code LOV.
10. Enter a currency amount in the Budget field and select a budget status using the Budget Status LOV.
11. Use the Time Frame LOV to select a time frame for closing the deal.
12. The status of the lead is new by default. You can choose to override the default designation by selecting a status of your own.
13. If the lead is qualified, then select the Qualified check box.

    If you do not select the Qualified check box, the application checks to see if the lead is qualified ever time the lead is updated. If the application determines the lead is qualified, then this check box is selected automatically.

    The application qualifies a lead automatically if you or someone else on your sales team enters information in a set of fields determined by your implementation team. These include project name, time frame, and budget. To qualify a lead, the application looks to see only if an entry has been made in specified fields, it does not evaluate the quality of the lead.
14. A close reason is required only if you change the status of a lead to closed.
15. Use the Lead Rank field to evaluate the desirability of the lead. If you leave the Lead Rank field blank, then the application ranks the lead based on the information you have entered. The ranking takes place after you save the lead.

    The application ranks the lead using a lead score card set up by your application administrator. For example, a time frame of 1-3 months receives more points than a time frame of 1 year. A budget of $1 million receives more points than a budget of $10,000.
16. Specify the sales channel. By default, this can be either direct or indirect.
17. If you wish to assign this lead to someone in your sales team, then use the Lead Owner LOV to enter the name of the individual. The person becomes the owner of the lead and receives notification in the work queue of this assignment.
18. Click **Save** on the toolbar.

You are now ready to:

- Enter purchase interests on the Purchase Interest tab
- Enter notes on the lead on the Notes tab
- Select individuals and sales groups for the lead sales team

Entering Interests, Contacts, and Other Details in the Lead Center

Use this procedure to enter a prospect's purchase interests and other details into an existing lead using the Lead Center. While you can also enter purchase interests directly in the Lead tab of the eBusiness Center, the Lead Center provides you with a better interface for entering lead details.

Prerequisites

You must create the lead and display it in the Lead Center.

Steps

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

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

4. You can designate one contact as the primary contact by selecting the primary check box.
5. If you wish to assign tasks to others in your organization for this lead, then select the Task tab and follow the instructions for creating tasks.

Viewing Opportunities Created from a Lead

Use this procedure to view opportunities that have been created from a lead using the Lead Center.

Prerequisites

Display the lead in the Lead Center.

Steps

1. Select the Opportunity tab.

   Any opportunities created from the lead are listed.

2. If you wish to view an opportunity, then select the opportunity from the list and click **Opportunity Center**.

   The Opportunity Center displays the details of the opportunity.

Qualifying a Lead

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

Prerequisites

Display the lead you wish to qualify in the Lead tab of the eBusiness Center. or in the Lead Center

Steps

1. A lead can become qualified automatically when you enter information in a set of required fields.

   These include project name, time frame, and budget. Which fields must be entered for a lead to qualify automatically depends on your implementation. To qualify a lead, the application looks to see only if an entry has been made in specified fields. It does not evaluate the quality of the lead.

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

2. If you wish to qualify a lead manually, then select Qualified from the Status List of Values.

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

Turning a Lead into an Opportunity

Use this procedure to turn a lead into an opportunity.

Prerequisites

- Display the lead in the Lead Center or on the Lead tab of the eBusiness Center.
- The lead must be qualified before you can turn it into an opportunity.

Steps

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

Checking for Duplicates When Creating Opportunity from a Lead

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

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

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

Prerequisites

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

Steps

1. The left pane displays the current lead. The right pane displays information on possible duplicate opportunities.

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

Guidelines

Your application administrator sets the criteria that are used to check for potential duplicate opportunities. See Administering Leads.

Entering Notes for a Lead in the Lead Center

Use this procedure to enter a note on a lead.

Prerequisites

Display the lead in the Lead Center

Steps

1. Navigate to the Notes tab.
2. Click **New**.
3. Enter the note in the Note text box.
4. If you wish to make this note viewable by everyone in the organization who has permission to access to the object, then make sure the Public check box is selected.
5. If you wish to make this note private and therefore invisible to others in your organization, then deselect the Public check box and select the Private check box.

6. Click **Save** on the toolbar.

   The note is automatically linked to the object you are viewing and contains information about the note creator and date and time the note was created.

   If you wish the note to be visible from other objects within Oracle TeleSales, then you must relate the note to those objects. See Relating a Note to Other Objects for more details.

7. If you wish to create a second note, then:

   a. Place your cursor in the New Note text box.

   b. Click **New** in the toolbar. This is the button with a green plus sign.

   c. Enter the note and click **Save**.

Guidelines

The lead note you create is automatically linked to the lead and customer record.

References

About Notes

Viewing Lead Notes

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

Prerequisites

Display the lead in the Lead Center

Steps

1. Navigate to the Notes tab.

The Notes tab lists notes entered in the last month for that object type are listed in the dynamic table on the left.

2. If you wish to change the date range of notes displayed, then:

   a. Enter the date range in the View Notes From and To fields.

   b. Click **Display**.

      A new list of notes appears for the date range you selected.

3. To view a note you can place your cursor over the Note field in the list, or you can select the note in the list to display the text on the right.
4. If you wish to view the full text of all of the notes in a continuous list, then:
   a. Click **Summary**.

      The first page of notes display sin the Notes Summary window.
   b. Click **Next** to display more notes.

References

Searching for Text Within Notes

About Notes

Accepting a Lead Assigned to You

Use this procedure to accept a lead that has been assigned to you. When a lead is assigned to you, it automatically appears in the Universal Work Queue.

Prerequisites

None

Steps

1. Display the lead in the Lead Center. You can do so by double clicking on the lead name in the Universal Work Queue. For more details, see Accessing Leads, Opportunities, and Other Work from Your Work Queue.

   The lead appears in the Lead Center window.
2. Select the Accepted check box.
3. Click **Save** on the toolbar.

Refusing a Lead Assigned to You

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

Prerequisites

None

Steps

1. Display the lead in the Lead Center by double clicking on the lead name in the Universal Work Queue. For more details, see Accessing Leads, Opportunities, and Other Work from Your Work Queue.

   The lead appears in the Lead Center window.

2. Click **Decline**.

   The Decline Reason window appears.

3. Use the Decline Reason List of Values to select the reason.

4. Click **OK.**

Assigning a Lead to Someone Else

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

Prerequisites

Display the lead in the Lead Center

Steps

1. If you wish to leave the territory management program to automatically assign the lead to a member of the sales team, then delete any name, if any, from the Lead Owner field.

2. If you wish to over-ride the territory assignment program and assign this lead to an agent manually, then use the Lead Owner field List of Values to enter an agent's name.

3. Click **Save**.

Selecting Individuals and Sales Groups for a Lead Sales Team

Use this procedure to manually add sales agents and partners to a lead sales team. You can add individuals or entire sales groups to your team with this procedure.

Adding someone to the sales team makes them able to view a the lead and add notes and tasks. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the opportunity.

If your organization has implemented CRM territory management module, then a sales team is assigned to the lead automatically. However you can use this procedure to override any automatic assignment by selecting the Keep check box.

Prerequisites

Display the lead in the Lead Center

Steps

1. Select the Sales Team tab.

   The tab lists the current sales team.

   If your organization has set up the CRM territory management module, then the sales team is automatically assigned to the lead when you create it.

2. If you wish to add the team members of an entire sales group, then:

   a. Click **Add Resource Team**.

      The Add Resource Team window appears.

   b. Search for the sales team you wish to add by entering its name or partial name in the Team Name and clicking **Find**. Use the % sign to substitute for any missing characters.

      The sales team(s) that match your search criteria appear in the Team Name column below.

   c. Select the sales team you wish to add by placing your cursor anywhere in the record.

   d. The names of the individuals on the sales team appear below.

   e. If you wish to provide the new team members with rights to modify lead information, then select the Provide Full Access check box.

   f. Click **OK**.

      The sales group sales team is added to the lead sales team. Each individual has the Keep check box selected. This means that their assignment cannot be overridden by the Territory Manager module.

3. If you wish to add an individual sales team member, then, in the Internal Sales region:

   a. Use the Sales Agent List of Values to add the agent.

b. If you wish this individual to have update privileges for this opportunity, then select the Full check box. All team members have view privileges.

c. If you wish to keep this individual regardless of the assignment made by the CRM territory management module, then make sure the Keep check box is selected.

d. Click **Save** on the toolbar when you have completed adding agents.

Guidelines

Note: In some implementations, it may be possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This may result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab to over-ride territory assignment and prevent this from happening.

Searching for and Displaying an Opportunity Using Universal Search

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

You can search either by using the Quick Search tab, which is optimized for fast retrieval, or by using the Expanded Search tab. You cannot combine the two methods of searching.

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

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

Prerequisites

None

Steps

1. Click **Find** in the toolbar. This is the flashlight icon.

   The Universal Search window appears.

2. From the Search drop-down list, choose Opportunity.

3. If you wish to use one of the queries optimized for fast retrieval, then:

   a. On the Quick Search tab, select the radio button corresponding to the query you wish to use.

   b. Make entries in all fields.

4. If you wish to search using the expanded search, then:

   a. Select the Expanded Search tab.

   b. Enter search criteria in any of the fields in the Basic region.

   - Enter a range for win probabilities and dates.
   - Selecting the Sales Credit check box limits your search to only those opportunities you are listed to receive sales credit for. Deselecting this check box searches for all opportunities where you are listed in the sales team regardless whether you receive sales credit or not.

   c. Enter search criteria in the Advanced region. This is done by selecting a search term using the Item List of Values (LOV), entering an operator using the Condition LOV, and entering the value of that condition in the Value field.

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

5. If you wish to include inactive records in the search, then select the Include Inactive Records check box.

6. Click **Search**.

   The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

7. If you wish to save the results of your search as a list, then follow the procedure in Creating a List.

8. If you wish to display an opportunity on the list, then:

a. If you wish to view this item in a separate opportunity center window, then select the Multiple Opportunity Centers check box.

b. If you wish to display one opportunity and close the window, then click **OK.**

c. If you wish to display an opportunity but leave the search window open in the background so you can come back and select another opportunity from the list, then click **Apply**.

The application displays the opportunity in the Opportunity Center.

You can view all of the publicly accessible notes associated with the opportunity by clicking the View Notes button.

Guidelines

The Basic region of the Expanded Search allows you to search on the following fields:

- Opportunity Name
- Customer Name (The name of the organization or the consumer)
- Status
- Opportunity #
- Win % (From and To)
- Close Date (From and To)
- Channel
- Sales Stage
- Opportunity Total Amount (From and To)
- Sales Credit

Here are the fields you can search on using the Advanced region of the Expanded Search:

- Purchase Interest Type
- Purchase Primary Interest
- Purchase Secondary Interest
- Project Name
- Contact: First Name

- Contact: Last Name
- Source code
- Offer Code
- Source Code Name
- Flex Fields (15)
- City
- State
- Province
- Country
- Sales Person (Last, First)
- Include Inactive

Displaying an Opportunity in the eBusiness Center

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

   The opportunities that have been created for this person or organization, if any, are listed in the left side of the tab.
4. If you wish the list to display only opportunities you receive sales credit for, then select the Sales Credits check box.
5. If you wish to view only open opportunities, then deselect the Display All check box.

6. You can sort the opportunities any column in the list by clicking on the column heading. See Manipulating Data in Your Work Queue and Other Dynamic Tables.
7. Select the opportunity you wish to view or modify from the list on the left. The basic information about the opportunity appears on the right side of the tab.
8. If you wish to view notes for this opportunity, then click **Opportunity Notes**.
9. If you wish to view more details about the opportunity, then click **Details** to launch the Opportunity Center.

Entering a Note for an Opportunity

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

Prerequisites

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

Steps

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

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

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

Viewing Notes for an Opportunity

Use this procedure to view the notes for an opportunity.

Prerequisites

None

Steps

1. Display the opportunity in the eBusiness Center.
2. Click **All Notes**.

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

References

Searching for Text Within Notes

About Notes

Creating an Opportunity Without a Prior Lead in the eBusiness Center

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

Prerequisites

Display the party in the eBusiness Center header.

Steps

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

2. If you wish to create an opportunity for an organization, then select the radio button labeled with the name of the organization. This is the second button from the left.

3. Select the Opportunity tab.

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

4. Click **New**.

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

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

   ---

6. Enter a close date for the opportunity. This date determines the forecast in which your opportunity information appears.

   Note: You can enter a customer's purchase interests directly on the Opportunity tab, but you must scroll to view additional fields. If you want more room to work in, then click **Details** and make your entries on the Purchase Interest tab of the Opportunity Center instead.

   ---

7. If you wish to enter customer purchase interests directly on the Opportunity tab, then for each purchase line:

   a. If you know the inventory item number, then use the Inventory Id List of Values (LOV) to enter it. The product description and interest type fields fill in automatically.

   b. If you do not know the inventory item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by product description.

      You can search for partial words and numbers using the % sign to indicate missing or unknown characters. The search is not case sensitive. For example, a search for `desktop%`, finds all product descriptions starting with the word Desktop or desktop. Searching for `%desktop%` brings up all products with the word "desktop" or Desktop anywhere in the description.

See About Searching Using Partial Search Terms for more details about using the % sign in searches.

When you enter an item, the product inventory ID and interest type fields fill in automatically.

c. If you do not know the exact product the customer is interested in, then you can use the Primary and Secondary interest type Lists of Values (LOVs) to enter the customer's general purchase interest.

d. Enter an Interest Type if none appears.

Note: Interest Type is required.

e. Optionally, enter a secondary product interest.

f. The Forecast Date automatically defaults to the Close Date of the opportunity. Changing this date does not affect the forecast unless the Roll. check box is selected. See Splitting Up a Purchase Line for Inclusion in Multiple Forecasts.

g. The Source Code and Offer fields default to the source code entered in the header for the opportunity as a whole. If this purchase line is related to a different source code than the opportunity header, then make another selection.

h. Optionally, enter the Units of Measure and quantity of the item.

i. Enter a currency amount of the purchase. This is the amount included in forecasts and added to the other purchase line amounts to give you the total purchase amount for the opportunity.

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

9. To enter other detailed information for the opportunity, click **Details** and follow the procedure outlined in Entering Purchase Interests in an Opportunity.

Guidelines

> **Note:** In some implementations, it may be possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This may result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab in the Opportunity Center to over-ride territory assignment and prevent this from happening.

Viewing Reports

You can launch a variety of reports, including reports on your pipeline, revenue, leads, and opportunities, directly from the Navigator. The reports, which are located under the Reports heading, open in a separate browser window. See Oracle Sales Online Concepts and Procedures for more information.

Using the Opportunity Center

Help is available on the following topics:

- Displaying opportunity in the Opportunity Center
- Displaying the customer in the Opportunity Center
- Creating an opportunity in the Opportunity Center
- Entering purchases and forecasted amounts
- Entering opportunity contacts
- Classifying an opportunity
- Selecting an opportunity sales team and partners
- Viewing sales credits for an item in an opportunity
- Entering sales credit for purchases in an opportunity
- Viewing sales credit totals for an opportunity
- Tracking obstacles to an opportunity
- Closing an opportunity so you can receive sales credit

- Assigning tasks for an opportunity
- Viewing tasks associated with an opportunity
- Viewing leads associated with an opportunity
- Viewing customer quotes and orders
- Creating a quote or order from an opportunity
- Splitting up an opportunity if only some items can close
- Deleting purchase items from an opportunity
- Copying an opportunity

Displaying an Opportunity in the Opportunity Center

You can display an opportunity in the Opportunity Center in a number of ways:

- Use the Universal Search window to search for the opportunity using multiple search criteria.
- Display the opportunity in the eBusiness Center and then click **Details**.
- Double click on the opportunity in the Universal Work Queue.
- Navigate to the opportunity from the opportunity summary in the Dashboard tab of the eBusiness Center.

Displaying a Customer in the Opportunity Center

Use this procedure to display a customer in the Opportunity Center.

Prerequisites

Your customer, an organization or a consumer, must already exist in the database.

Steps

1. Navigate to the Opportunity Center
2. From the Party Type drop-down list choose either Organization or Person (consumer).
3. Use the Customer field List of Values to enter the organization or consumer name.

Creating an Opportunity in the Opportunity Center

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

Prerequisites

The customer must already be entered into the database.

Steps

1. Navigate to the Opportunity Center.
2. Click **New**.
3. Enter the basic opportunity information in the fields provided. The fields include opportunity name, project name, source code, status, and budget.

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

4. Enter a close date for the opportunity. This date determines the forecast in which your opportunity information appears.
5. Click **Save** on the toolbar.

You are now ready to:

- Enter purchases and forecasted amounts on the Purchase Interest tab
- Enter sales credits on the Purchase Interest tab
- Enter opportunity contacts on the Contact tab
- Classify the opportunity on the Classification tab
- Select the sales team for the opportunity on the Sales Team tab.
- Track obstacles to the sale using the Obstacle tab
- Close the opportunity on the Closing tab so you and other on the Sales Team can receive sales credit
- Assign tasks for this opportunity to others on the sales team using the Task tab

- View any leads associated with this opportunity on the Lead tab
- View related quotes and orders on the Quotes/Orders tab
- View partner activity and history on the Partner tab
- Route the Opportunity to a Partner if you have permission using the Partner tab
- Create a quote or order by clicking the Create Quote button
- Copy the opportunity using the Copy button

Entering Purchase Interests and Forecasted Amounts

Use this procedure to enter a customer’s purchase interests and forecast purchase amounts into an opportunity.

Prerequisites

You must create the opportunity first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Purchase Interest tab.
3. Enter the customer’s purchase interests. For each purchase line:
   a. If you know the inventory item number, then use the Inventory Id List of Values (LOV) to enter it. The product description and interest type fields fill in automatically.
   b. If you do not know the inventory item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by product description.

      You can search for partial words and numbers using the % sign to indicate missing or unknown characters. The search is not case sensitive. For example, a search for `desktop%`, finds all product descriptions starting with the word Desktop or desktop. Searching for `%desktop%` brings up all products with the word "desktop" or Desktop anywhere in the description. See About Searching Using Partial Search Terms for more details about using the % sign in searches.

      When you enter an item, the product inventory ID and interest type fields fill in automatically.

c. If you do not know the exact product the customer is interested in, then you can use the Primary and Secondary interest type Lists of Values (LOVs) to enter the customer's general purchase interest.

d. Enter an Interest Type if none appears.

Note: Interest Type is required.

---

e. Optionally, enter a secondary product interest.

f. The Forecast Date automatically defaults to the Close Date of the opportunity. Changing this date does not affect the forecast unless the Roll. check box is selected. See Splitting Up a Purchase Line for Inclusion in Multiple Forecasts.

g. The Source Code field defaults to the marketing source code entered in the header for the opportunity as a whole. If this purchase line is related to a different source code than the opportunity header, then make another selection.

h. Optionally, enter the Units of Measure and quantity of the item.

i. Enter a currency amount of the purchase. This is the amount included in forecasts and added to the other purchase line amounts to give you the total purchase amount for the opportunity.

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

   You are now ready to enter the sales credit for the purchases you have entered.

Splitting Up a Purchase Line for Inclusion in Multiple Forecasts

Use this procedure to split up an opportunity purchase amounts so that it appears in multiple forecasts over a period of time. This is called a rolling purchase line. Suppose, for example, you are selling a $1200 service on a subscription basis and your customer makes twelve monthly payments. In this case you can use this procedure to spread out the total over the twelve-month period so that only a $100 appears in each monthly forecast.

Prerequisites

You must create the opportunity first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Purchase Interest tab.
3. In a blank purchase interest line, place your cursor in the Amount field.
4. Choose Rolling Purchase Lines from the Actions menu.

   The Rolling Purchase Lines window appears.
5. The forecast date defaults to the close date of the opportunity. Changing this date also changes the close date.
6. Enter the number of periods you wish to copy this purchase line into.
7. Enter the interval for the periods. This determines the forecast dates for each period.
8. If you know the inventory item number of the purchase, then use the Inventory Id List of Values (LOV) to enter it. The product description and interest type fields fill in automatically.
9. If you do not know the inventory item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by product description.

   You can search for partial words and numbers using the % sign to indicate missing or unknown characters. The search is not case sensitive. For example, a search for `desktop%`, finds all product descriptions starting with the word Desktop or desktop. Searching for `%desktop%` brings up all products with the word "desktop" or Desktop anywhere in the description. See About Searching Using Partial Search Terms for more details about using the % sign in searches.

   When you enter an item, the product inventory ID and interest type fields fill in automatically.
10. If you do not know the exact product the customer is interested in, then you can use the Primary and Secondary interest type Lists of Values (LOVs) to enter the customer’s general purchase interest.
11. Enter an Interest Type if none appears.

Note: Interest Type is required.

---

12. The Source Code field defaults to the marketing source code entered in the header for the opportunity as a whole. If this purchase line is related to a different source code than the opportunity header, then make another selection.
13. Optionally, enter the Units of Measure and quantity of the item the customer is purchasing in each of the periods.
14. Enter the amount of the purchase to appear for each period. This is the amount included in each forecast and added to the other purchase line amounts to give you the total purchase amount for the opportunity.
15. Click **Add Lines**.

    The application creates purchase lines in the Purchase Interest tab corresponding to the number of periods. Each new line is identical except for the Forecast Date.
16. Click **Save** on the toolbar.

    You are now ready to enter the sales credit for the purchases you have entered.

Entering Sales Credit for Purchases in an Opportunity

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

Prerequisites

Display the opportunity in the Opportunity Center:

Steps

1. Select the Purchase Interest tab.
2. Using the select field to the left of a purchase item, select the purchase item for which you wish to assign sales credits.

   Any sales agents already receiving credit for this item are listed in the lower portion of the tab.
3. From the Display drop-down list, select the type of sales credit you wish to assign for this item:

   - **Forecast credit**: Revenue credit amounts that show up in the forecasting module of Oracle Sales Online.

- **Other Credit**: Non-revenue credit. For example, credit toward sales quotas.

4. If you wish to modify the existing credits agents or partners are to receive for the item, then:

   a. Modify the numbers in the % field for the agent.

   b. If you are modifying forecast credits, then you must modify the credit percentages for other agents and partners so that the total adds up to 100 percent.

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

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

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5. If you wish to add any additional sales people who are to receive sales credit for this item, then:

   a. Use the Sales Agent List of Values (LOV) to enter a sales agent. If no blank record lines appear, then use the New button in the toolbar to add an additional record.

   b. In the % field, enter the number corresponding to the percentage of commission the individual is to receive.

      Any new sales person you add here is automatically added to the sales team for the opportunity.

   c. If you are assigning revenue credit, then adjust the credit percentages of the other sales agents and partners for this item so the total adds up to 100 percent.

   d. Click **Save** on the toolbar.

6. If you wish to add any additional partners who are to receive sales commissions for the sale of this item, then:

   a. Use the Partner Name LOV to enter a partner. If no blank record line appears, then use the New button in the toolbar to add an additional records.

b. In the % field, enter the number corresponding to the percentage of commission the individual is to receive for this item. Do not enter a percent sign.

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

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c. If you are entering revenue credits, then adjust the credits of the other sales agents and partners, so the total adds to 100 percent.

d. Click **Save** on the toolbar.

Entering Opportunity Contacts

Use this procedure to enter contacts into an existing opportunity using the Opportunity Center. You can enter the primary contact directly in the header of the Opportunity Center. If you wish to add any additional contacts, then you must do so using the Contact tab.

Prerequisites

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

Steps

1. Display the opportunity in the Opportunity Center:
2. If you wish to add the primary contact for the opportunity, then:
   a. Use the Primary Contact List of Values (LOV) to select the contact.
   b. Select a role for the contact using the Contact Role LOV.
   c. Click **Save** on the toolbar.
3. If you wish to enter additional contacts in the Opportunity Center, then:
   a. Select the Contact tab.
   b. Using the First Name List of Values, add the contacts.

c. If you wish to designate a contact as the primary contact for the opportunity, then select the Primary check box next to the record. You can only designate one contact as a primary contact for the opportunity.

d. Click **Save** on the toolbar.

Classifying an Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

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

Selecting Individuals and Sales Groups for the Opportunity Sales Team

Use this procedure to manually add sales agents to an opportunity sales team. You can add individuals or entire sales groups to your team with this procedure.

Adding someone to the sales team makes them able to view an opportunity and add notes and tasks. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the opportunity.

If your organization has implemented the CRM Territory Manager module, then a sales team is assigned to an opportunity automatically. However you can use this procedure to override any automatic assignment by selecting the Keep check box.

Prerequisites

You must create the opportunity first.

Steps

1. Display the opportunity in the Opportunity Center:

2. Select the Sales Team tab.

   The tab lists the current sales team.

   If your organization has set up the CRM territory management module, then the sales team is automatically assigned to the opportunity when you create it.

3. If you wish to add the team members of an entire sales group, then:

   a. Click **Add Resource Team**.

      The Add Resource Team window appears.

   b. Search for the sales team you wish to add by entering its name or partial name in the Team Name and clicking **Find**. Use the % sign to substitute for any missing characters.

      The sales team(s) that match your search criteria appear in the Team Name column below.

   c. Select the sales team you wish to add by placing your cursor anywhere in the record.

   d. The names of the individuals on the sales team appear below.

   e. If you wish to provide the new team members with rights to modify opportunity information, then select the Provide Full Access check box.

   f. Click **OK**.

      The sales group sales team is added to the opportunity sales team. Each individual has the Keep check box selected. This means that their assignment cannot be overridden by the Territory Manager module.

4. If you wish to add an individual sales team member, then, in the Internal Sales region:

   a. Use the Sales Agent List of Values to add the agent.

   b. If you wish this individual to have update privileges for this opportunity, then select the Full check box. All team members have view privileges.

   c. If you wish to keep this individual regardless of the assignment made by the CRM territory management module, then make sure the Keep check box is selected.

   d. Click **Save** on the toolbar when you have completed adding agents.

Guidelines

The resource groups you can add to the sales team are set up by your application's administrator using the Resource Manager. See the *Oracle TeleSales Implementation Guide* for details.

> **Note:** In some implementations, it may be possible for agents to lose access to customer, lead, and opportunity records they create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This may result in an agent losing access to that information. If you wish to prevent this from happening, make sure you select the Keep check box next to each name on the Sales Team tab to over-ride territory assignment.

Viewing Sales Credits for an Item in an Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

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

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

Viewing Sales Credit Totals for an Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Sales Team tab.
3. Click **View Credit Total**.

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

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

Tracking Obstacles to an Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Obstacles tab.
3. In the Competitors region, use the Lists of Values (LOVs) to enter any competitors and their products. You can add a free text comments in the Comments field.
4. If you wish to track other issues related to the opportunity, then in the Other Issues region:

a. Use the Issue LOV to enter an issue.
b. Select a Status.
c. Enter a comment.

5. Click **Save** on the toolbar.

Closing an Opportunity So You Can Receive Sales Credit

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

Prerequisites

The opportunity must be created first.

Steps

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

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

---

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

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

Viewing Partner Activity and History for an Opportunity

Use this procedure to view information about what services partners may be selling and the history of partner activity for the opportunity.

You can only view the activity of one partner at a time although an opportunity may be assigned to multiple partners.

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Partner tab.
3. The Preferred Partner field lists a partner associated with this opportunity.
4. Additional Partner Solutions and Services region lists the services this partner is offering.
5. If you wish to view a history of partner interactions for this opportunity, including which partners were offered the opportunity, then click **Routing Details**.

Routing an Opportunity to a Partner

Use this procedure to enter the criteria the routing manager will use to select a partner for the opportunity or, if you have the permission, route the opportunity to a partner directly.

Prerequisites

You must create the opportunity first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Partner tab.
3. If you wish to route the opportunity to a partner and have the permission to do so, then:
   a. Use the Routing Partner List of Values (LOV) to select the partner you wish to route to.
   b. If you wish to bypass the channel manager approval, then select the Bypass CM Approval check box. If you cannot select this check box, this means you do not have permission to do so.
   c. Click **Direct Routing**.

      The Routing Status field tells you the status of your request and whether the partner has accepted or not.
4. If you wish to enter criteria that will be used by the channel manager to select a partner, then use the Attributes, Attribute Value, and Description LOVs to describe the type of appropriate partner you want.
5. Click **Save** on the toolbar when you are finished.

Assigning Tasks for an Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Task tab.

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

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

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

Viewing Tasks Associated with an Opportunity

Use this procedure to view tasks associated with an opportunity.

Prerequisites

The opportunity must be created first.

Steps

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

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

Viewing Leads Associated with an Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Lead tab.
3. The leads that were used to create this opportunity are listed.
4. If you wish to view any of the leads, then:
   a. Select the lead.
   b. Click **Lead Center**.
   c. If you wish to view details of multiple leads, then select the Display Multiple Lead Centers check box.

Viewing a Customer’s Quotes and Orders for a Specific Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Quotes / Orders tab.
3. If you wish to previous orders from the customer, then:
   a. From the View drop-down list, select Orders.

      The customer’s orders in accounts receivables are listed in the tab.
   b. Select an order you wish to view.
   c. Click **Details** to view details of the order in a separate window in Oracle Order Management.
4. If you wish to view quotes for this customer, then:
   a. From the View drop-down list, select Quotes.

      The customer’s quotes are listed in the tab.

b. Select a quote you wish to view or modify.

c. Click **Details** to view details of the quote in an Oracle Quoting - Forms window.

Freezing an Opportunity So Nobody Can Modify It

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

Prerequisites

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

Steps

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

Guidelines

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

Creating a Quote or Order from an Opportunity

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

Prerequisites

Before you can create an order, you must enter the ship to and bill to address.

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Purchase Interest tab.
3. Enter inventory items and quantities for the purchase interest.

4. Click **Create Quote** in the Opportunity Center header.

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

5. You must close the opportunity so you and others on the opportunity sales team can receive sales credit.

Splitting Up an Opportunity If Only Some Items Can Close

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Click **Copy**.

   The Opportunity Center displays the copy you have made. The only information changed is the opportunity number which is automatically incremented to the next available number.

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

   The Opportunity Center displays.

9. Delete the purchase items which are in the copy you have made.
10. Click **Save** in the toolbar.

Deleting Purchase Items from an Opportunity

Use this procedure to delete purchase items from an opportunity.

Prerequisites

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

Steps

1. Display the opportunity in the Opportunity Center:
2. Select the Purchase Interest tab.
3. Select the purchase item you wish to delete.
4. Click **Clear Record** on the toolbar.

Copying an Opportunity

Use this procedure to copy an opportunity. You will want to copy an opportunity if you wish to split an opportunity, for example, or if different customers wish to purchase the same set of items.

Prerequisites

None

Steps

1. Display the opportunity in the Opportunity Center:
2. Click **Copy**.

   The Copy Opportunity window appears.
3. If you wish the copied opportunity to go to a different customer, then select the customer using the Customer List of Values (LOV).
4. Optionally, select an address using the Address LOV. It appears in the Location field.
5. Select the check boxes corresponding to the information you wish to copy to the new opportunity.
6. Click **Copy**.

The Opportunity Center displays the copy you have made. The only information changed is the opportunity number which is automatically incremented to the next available number.

Updating Opportunities

You can update opportunities in one of three ways:

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

Updating an Individual Opportunity

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

Prerequisites

The opportunity must be created first.

Steps

1. Display the opportunity in the Opportunity Center:
2. Update the opportunity. You can:
   - Enter opportunity contacts
   - Enter items a customer wishes to purchase
   - Enter sales credit for purchases in an opportunity
   - Create a quote or order from the opportunity
   - Close the opportunity so you can receive sales credit
   - Classify the opportunity
   - Select the sales team and partners

- Track obstacles to the opportunity
- Assign tasks to others regarding this opportunity
- View customer quotes and orders
- Split up the opportunity if only some items can close
- Delete purchase items from an opportunity

Updating a List of Opportunities

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

Prerequisites

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

Steps

1. Navigate to the Mass Opportunity Update.

   The Mass Update of Opportunities window opens.

2. Click **Search**.

   The opportunities on the list display below.

3. Use the Lookup Name List of Values (LOV) to find the list of opportunities you wish to update.

4. Select the opportunities you wish to update, by selecting the Select check box for each.

5. Make entries in the win %, sales stages, close dates, and channel fields for each entry.

6. Click **Mass Update**.

Updating Multiple Opportunities in One Window

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

Prerequisites

None

Steps

1. From the Navigator, select Pipeline Management.

   The Pipeline Search Criteria window appears.

2. Enter your search criteria.

   - You can use the % sign to substitute for any missing characters. See About Searching Using Partial Search Terms for more details.
   - You can enter one value or a range of values for win probability, close date, total amount, and sales credit amount.
   - Select one of the Credits radio buttons to search for opportunities with forecast credits, other (non-revenue) credits, or all for the agent listed in the Sales Agent field.

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

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3. If you belong to or manage multiple sales groups, then you can restrict the search to a particular sales group by selecting that sales group from the Sales Group List of Values (LOV).

4. If you manage a sales group, you can restrict the search to a single member of the sales group. To do so, use the Sales Agent field LOV to enter the name of the subordinate.

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

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5. Click **Search**.

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

6. If you need to modify the search, then click **Return to Search** to return to the Pipeline Search Criteria window.

7. If you wish to update the win probability (Win %), status, close date, channel, sales stage, or close reason for an opportunity, then make your entry in the list of opportunities.

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

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

      The purchase interest information for that opportunity appears below.
   b. Make your modifications.

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

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

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

Administering Oracle TeleSales

This group of topics explains how to administer different functions of Oracle TeleSales. While all users can set up personal preferences, other procedures may be restricted to applications administrators only.

Customizing Your Application With Personal Preferences

You can set different system profile options to change the behavior of your application.

You can:

- Change the order of items in your Work Queue
- Change different aspects of the user interface such as which values are defaulted in a particular field.

Use this procedure to set up your personal profiles.

Prerequisites

None

Steps

1. Navigate to **Profile User Values**.

   The Personal Profile Values window appears.

2. Click **Find** in the toolbar. This is the button with the search light.

   The Profiles search window appears.

3. Enter a partial name of the profile you wish to set. Use the % sign to substitute for any missing characters. For example, searching for `OTS%` brings up all of the TeleSales profiles.

4. Click **Find**.

   The Profiles window displays the profiles that meet your search criteria.

5. Double-click on the profile you wish to set.

   The profile displays in the Personal Profile Values window.

6. Set the value of the profile by making a selection using the User Value List of Values (LOV).

Changing the Order of Items in Your Work Queue.

If you wish to change the order of work queue items you can set the following profiles to a sequence of numbers that reflect the order in which you wish them to be presented.

For example, if you assign IEU: Queue: Myteam Leads to 1 and OTS: Queue Order: MyTeam Opportunities to 2, then all the leads with you on the sales team are listed first in the Work Queue under the heading My Leads (Sales Team). All of your opportunities are listed second under the heading My Opportunities (Sales Team).

The following profiles determine the order the item appears on the work queue. Set these profiles to the sequence you wish to view items in your work queue:

Profile	Work Queue Item
IEU: Queue: Leads	My Leads (Owner): All leads you own.
IEU: Queue: Myteam Leads	My Leads (Sales Team)
IEU: Queue: Opportunities	My Opportunities (Sales Credits)
IEU: Queue: Myteam Opportunities	My Opportunities (Sales Team)
IEU: Queue: Marketing Lists	Marketing Lists

Other Personal Profiles

The following table lists the personal profiles you can set to change the behavior of different aspects of the interface and gives their description.

System Profile	Description
OTS: Default Collateral Reply To Email Address	Email address you wish to default as the Reply to address for any electronic collateral you send out.
OTS: Default Collateral Subject Line	Default subject line for the collateral you send through the eBusiness center.
OTS: Default Country	The default country when you enter a new address.

System Profile	Description
OTS: Default Cover Letter for Collateral Requests.	The default cover letter (email) you wish to send out with electronic collateral.
OTS: Default Event Reply to Email Address	The default Reply to address for Event Confirmation emails.
OTS: Default Event Subject Line	The default subject line for Event Confirmation emails.
OTS: Default Note Type	The default Note Type used for a new Note.
OTS: Default Party Type	The Default Party Type for a new customer entry.
OTS: Default Person Title	To default title for a person you enter.
OTS: Default Phone Line Type	To default the phone line type
OTS: Default Relationship	The default relationship between parties
OTS: Default Shipping Method for Electronic collateral	The default shipping method for electronic collateral.
OTS: Default Shipping Method for Physical collateral	The default shipping method for electronic collateral.
OTS: Default Tab in eBusiness Center	The tab which appears on top when you first open the eBusiness Center.
OTS: Default Tab in Opportunity Center	The tab which appears on top when you first open the Opportunity Center.
OTS: Default Tab in Sales Lead Center	The tab which appears on top when you first open the Sales Lead Center
OTS: Default Universal Search Tab	The tab which appears on top when you first open the Universal Search window.
OTS: Default Universal Search Type	The default type of search in the Universal Search window.
OTS: Default User Role and Sales Group	To default role and sales group assigned to you when you open up any of the center windows. This profile is important only if you are a member of multiple sales groups.
OTS: Show All Lists	Setting this profile to "No" displays only your own lists. A setting of "Yes" displays all lists.

System Profile	Description
OTS: Show Campaign and Offer Names instead of Codes	A setting of Yes displays campaign schedule and offer names in the Source Code field instead of the campaign schedule code and offer code.
OTS: UWQ Default Source Code	This sets the default Source Code used when you receive a call via Oracle Advanced Inbound.

Setting Up Lead Status

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

- New
- 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.

Steps

1. Under the Sales Administrator responsibility, navigate to **Administration Sales > Opportunity > Status Code**

   The Status Code page appears.

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.

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7. In the User 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**.

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.

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

Setting Up Automatic Lead Assignment

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

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.

   The territory assignment engine assigns the lead to the first resource found in the territory with the highest rank.

2. Set up the default individual to handle any leads that are not matched to any territory using 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.

3. 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. By default this value is New. If you wish to change this default, do so now.

Setting Up Automatic Lead Ranking

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

Prerequisites

Make sure the system profile option OS: Rank Lead is set Y. This is the seeded default value.

Steps

1. Log into Oracle TeleSales under the Sales Administrator responsibility.

2. Set up your lead score card. This assigns a numerical score to entries users make in different fields.
3. Map the values the score card returns to the different lead rankings according to the procedure described in Setting Up Lead Rank Mapping.
4. Select the score card you wish to use to score leads by setting the system profile OS: Default Lead Scorecard to that score card. The ranking engine uses the default score card if no other score cards are enabled. The seeded default of this profile is the score card provided by Oracle.
5. Set up any other lead-related system profiles.
6. Your implementation team can implement a custom ranking engine by using a user hook described in the *Oracle TeleSales Implementation Guide.*

Setting Up a Lead Score Card

Use the procedure outlined below to set up a lead score card.

While you can create and enable multiple score cards using this procedure, you must select only one score card to score your leads. You select the scorecard by setting the system option profile OS: Default Lead Scorecard.

Steps

1. Under the Sales Administrator responsibility, navigate to **Administration > Sales > Lead > Lead Score Card**
2. The Lead Score Cards page appears listing the available score cards.
3. If you wish to modify an existing score card instead of creating a new one, then you can display it by:
   - Clicking on the name link of the score card in the list.
   - If you do not see the score card 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 score card.
4. To create a new score card, click **Create**.

   The Create Lead Score Card page opens.
5. Enter a Description.

6. Select a Start Date by clicking the Calendar icon and choosing a date. This is a required field.
7. 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.
8. 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 Score Card Details page. You are now ready to create another rule.

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

10. 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 score card calculates to the desired lead ranking.

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.

Steps

1. Under the Sales Administrator responsibility, navigate to **Administration > Sales > Lead > Lead Rank Mapping**

   The Lead Rank Mapping page appears.

2. Enter the minimum and maximum lead score ranges in the Min. Points and Max. Points fields and assign them ranks.

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

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

The range of values cannot overlap.

3. Make sure that the Enabled check box is selected for those rank mappings you wish to use.
4. Click **Update**.

Setting Up Lead System Profiles

The following table details the system profiles to be set up for leads. You can find the detailed procedure for setting up system profiles in Oracle applications in the *Oracle Applications Administrators Guide.*

- **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.
- **Used by**: the forms or jsp pages that use this profile.
- **Notes**: Usage notes.

Req.?	New	Profile Option	Level	User	Program	Default Value	Used by	Notes
N	Y	OS : Default Vehicle Response Code for Leads	S, R , U	V, U	V, U	User	asxvslmb .pls, create jsp	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
N	Y	OS : Default Budget Status for Leads	S, R , U	V, U	V, U	Pending	asxvslmb .pls, create jsp	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.

Req.?	New	Profile Option	Level	User	Program	Default Value	Used by	Notes
N	Y	OS : Default Decision Timeframe for Leads	S, R , U	V, U	V, U	Within 1 week	asxvslmb .pls, create jsp	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
N	Y	OS: Address Required for Sales Lead	S	None	V, U	No	asxvslmb .pls, create / de tail jsp pages	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.
N	Y	OS : Assign New Lead	S	None	V	No	asxvslab. pls	
N	Y	OS : Auto Qualify Lead	S	V	V	Yes	asxvslmb .pls	Used to determine whether to do auto qualification in sales lead API create / update. If not set, defaulted as ’N’.
Y	Y	OS : Default Status for Leads	S, R , U	V, U	V, U	New	asxvslmb .pls, create jsp	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.
Y	Y	OS : Default Channel for Leads	S, R , U	V, U	V, U	Direct	asxvslmb .pls, create jsp	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 : Rank Lead	S	None	V	System	LeadEO.j ava	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	Y	OS : Lead Routing Status	S	None	V	New	asxvslab. pls, asxldrtb. pls	When the routing engine finds a sales lead owner, then the sales lead status is reset to this profile
NOT USED	Y	OS : Dead Lead Status	S	None	V	Dead Lead	Not used.	Not Used

Req.?	New	Profile Option	Level	User	Program	Default Value	Used by	Notes
N	N	OS: Project name required	S	V, U	V,U	Yes	asxvslmb .pls	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	N	OS: Sales channel required	S	V, U	V, U	Yes	asxvslmb .pls	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.
N	N	OS: Total budget amount required	S	V, U	V, U	Yes	asxvslmb .pls	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.
N	N	OS: Decision time frame required	S	V, U	V, U	Yes	asxvslmb .pls	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	N	OS: Budget status required	S	V, U	V, U	Yes	asxvslmb .pls	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: Campaign code required	S	None	V, U	Yes	asxvslmb .pls	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.

Req.?	New	Profile Option	Level	User	Program	Default Value	Used by	Notes
N	N	OS: Contact role required	S	V, U	V, U	Yes	asxvslmb .pls	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.
N	N	OS: Contact phone required	S	V, U	V, U	Yes	asxvslmb .pls	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.
Y	N	OS: Sales Lead Access Privilege	S, R , U	None	V,U	Full	asxpslmb .pls	<Access APIs>
N	Y	OS: Source Code Mandatory for Leads	S	V	V	No	asxvslmb .pls	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	Y	OS: Privilege to Change Lead Owner	S, R , U	None	V,U	No	asxvslmb .pls	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.
N	N	OS: Default Resource ID used for Sales Lead Assignment	S	None	V	None	asxvslab. pls, asxldrtb. pls	This is the Resource ID assigned a lead that the territory assignment does not assign to a territory. It is used to decide sales lead owner if sales lead doesn't match any territory

Req.?	New	Profile Option	Level	User	Program	Default Value	Used by	Notes
N	N	OS: Calendar setting required for assignment	S	V	V	N	asxldrtb. pls	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.
N	Y	OS: Default Lead Contact Role	SRUA	VU	V	'END_ USER	'Contact java	Used for defaulting the contact role on the contact page.
Y	Y	OS: Lead Link Status	V	None	V	Converte d to Opportu nity	asxvslob. pls	Used to set the status of the lead after linking the lead to an opportunity.
Y	Y	OS: Default Lead Scorecard	SRA	VU	V	1	Score engine, LeadEO.j ava	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.
Y	N	OS: Manager Update Access	S,R,U	None	V,U	View data	asxvslmb .pls	Security management for leads. See the section on security for details.
Y	N	OS: Sales Admin Update Access	S,R,U	None	V,U	View data	asxvslmb .pls	Security management for leads. See the section on security for details.
Y	N	OS: Customer Access Privilege	S,R,U	None	V,U	Full	asxvslmb .pls	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	asxvslmb .pls	Security management for leads. See the section on security for details.
Y	N	OS: Forecast Calendar	S	None	V	None	asxrateb. pls	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	Corporat e	LeadsSu mmaryV O.java	Daily conversion type for currency conversion. Used in the amount calculation.
Y	N	OS: Date Mapping Type	S	VU	V	S	asxrateb. pls	Used to get pseudo period rate coming from start or end of the period.

Req.?	New	Profile Option	Level	User	Program	Default Value	Used by	Notes
Y	N	OS: Maximum Roll Days for Converting Amount	S	V	V	None	asxrateb. pls	Maximum Roll Days for Converting Amount if No Conversion Rate exists for a Day. Used to get maximum roll-up days for currency conversion
Y	Y	OS: Default Period Type for Currency Conversion	S	VU	V	None	as_ period_ rates users	Default period type for currency conversion. Used to get default period type for currency conversion.
Y	Y	OS: Address Required for Person	S	None	V	'N	'Contact java	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	N	OSO: Default Person Relationship	SRU	VU	V	'EMPLO YEE_OF	'Contact java	The default value for contact relationship type.
Y	N	OSO: Default Country	SRAU	VU	VU	United States	asfLeadC reatFrm.j sp	Used for defaulting the country selected on the create lead page. If not set, the first country in the drop-down will be chosen by default.
Y	N	OM: Item Validation Organization	SR	V	V	None	Lines java	Manufacturing organization items are validated. This profile is used to set AS_ SALES_LEAD_ LINES.organization_id