

Oracle® Partners Online

Concepts and Procedures

Release 11*i*

February 2002

Part No. A95219-02

Part No. A95219-02

Copyright © 2001, 2002, Oracle Corporation. All rights reserved.

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

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

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

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

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

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

Contents

| | |
|------------------------------------|-----------|
| Send Us Your Comments | xi |
|------------------------------------|-----------|

| | |
|---------------------|-------------|
| Preface..... | xiii |
|---------------------|-------------|

Understanding Oracle Partners Online

| | |
|---|---|
| Overview | 1 |
| Understanding Responsibilities & Profiles | 1 |
| Vendor User | 2 |
| Vendor Administrator..... | 2 |
| Partner User | 3 |
| Partner Administrator..... | 3 |
| VAD User | 3 |
| VAD Administrator | 3 |
| Navigation | 4 |
| Workflow and Email Alerts | 4 |
| Tracking Opportunity Flow and Status..... | 5 |
| Terms and Definitions..... | 6 |
| Tab Access..... | 7 |
| Home | 8 |
| Activity | 8 |
| Fund Request..... | 8 |
| Leads..... | 9 |
| Opportunities | 9 |
| Quotes..... | 9 |
| Forecast..... | 9 |

| | |
|----------------------|----|
| Customer | 10 |
| Partner | 10 |
| My Company | 10 |
| Service..... | 11 |
| Compensation..... | 11 |
| Fulfillment..... | 11 |
| Encyclopedia..... | 11 |
| Administration | 11 |

Using Oracle Partners Online

| | |
|--|----|
| Getting Started..... | 13 |
| Setting User Profiles and Preferences | 13 |
| Personalization | 13 |
| Setting Oracle Partners Online Preferences | 15 |
| Setting General Preferences..... | 16 |
| Setting Home Page Preferences | 16 |
| Your Home Page | 17 |
| Using the Territory Lookup Tool | 18 |
| Activity Tab..... | 18 |
| Personalizing Task Summary..... | 19 |
| Using Calendar Views..... | 19 |
| Creating a Task..... | 20 |
| Maintaining Task Details..... | 21 |
| Searching for a Task..... | 24 |
| Creating a Quick Task..... | 24 |
| Searching for a Quick Task..... | 25 |
| Adding an Attachment to a Task..... | 26 |
| Fund Request Tab | 27 |
| Viewing and Editing a Campaign (Fund Request)..... | 27 |
| Creating a Campaign (Creating a Fund Request)..... | 28 |
| Copy a Campaign (Fund Request) | 29 |

| | |
|--|----|
| Create a Campaign Budget | 30 |
| Campaign Schedules | 31 |
| Viewing a Campaign Schedule..... | 31 |
| Editing a Campaign Schedule’s General Details..... | 31 |
| Creating a Campaign Schedule | 32 |
| Lead Tab..... | 34 |
| Personalizing Leads..... | 35 |
| Creating a Lead | 36 |
| Maintaining a Lead..... | 37 |
| Searching for a Lead | 39 |
| Routing or Assigning a Lead | 40 |
| Ranking a Lead..... | 41 |
| Qualifying a Lead | 41 |
| Attaching a Contact to a Lead..... | 42 |
| Creating a Note (Lead)..... | 43 |
| Creating a Task (Lead) | 44 |
| Creating an Attachment (Lead) | 45 |
| Converting a Lead to an Opportunity | 46 |
| Linking a Lead to an Opportunity | 47 |
| Sales Teams (Leads)..... | 48 |
| Adding a Sales Team Member (Leads)..... | 48 |
| Adding a Partner to a Sales Team (Leads)..... | 49 |
| Adding a Resource Team to a Sales Team (Leads) | 50 |
| Opportunity Tab | 51 |
| Personalizing Opportunity Summary | 52 |
| Creating an Opportunity | 54 |
| Maintaining Opportunity Detail | 56 |
| Searching for an Opportunity | 57 |
| Leads (Opportunity)..... | 58 |
| Creating a Lead (Opportunity)..... | 58 |
| Copying an Opportunity | 59 |
| Creating a Quote from an Opportunity..... | 61 |
| Adding Purchase Items (Opportunity)..... | 62 |
| Sales Credits (Opportunity) | 63 |
| Maintaining Sales Credits (Opportunity)..... | 64 |

| | |
|--|----|
| Adding a Salesperson to Receive Sales Credits (Opportunity)..... | 64 |
| Adding a Partner to Receive Sales Credits (Opportunity)..... | 65 |
| Adding an Existing Contact to an Opportunity | 66 |
| Creating a New Contact (Opportunity)..... | 67 |
| Notes (Opportunity)..... | 68 |
| Creating Notes (Opportunity)..... | 69 |
| Viewing Notes (Opportunity)..... | 70 |
| Sales Teams (Opportunity)..... | 71 |
| Adding a Sales Team Member (Opportunity)..... | 71 |
| Adding a Partner (Opportunity)..... | 72 |
| Adding a Resource Team to a Sales Team (Opportunity) | 73 |
| Removing a Sales Team Member (Opportunity) | 74 |
| Tasks (Opportunity) | 75 |
| Creating a Task (Opportunity)..... | 75 |
| Adding an Attachment to a Task (Opportunity)..... | 77 |
| Maintaining a Task (Opportunity) | 77 |
| Adding a Classification (Opportunity)..... | 78 |
| Adding an Existing Competitor (Opportunity)..... | 79 |
| Creating a New Competitor (Opportunity)..... | 80 |
| Attachments (Opportunity)..... | 81 |
| Adding an Attachment (Opportunity) | 81 |
| Viewing an Existing Attachment (Opportunity)..... | 82 |
| Opportunity Matching | 82 |
| Assign an Opportunity | 84 |
| Accepting/Declining an Offered Opportunity | 84 |
| Updating an Active Opportunity | 85 |
| Managing Addresses | 85 |
| Creating a New Address..... | 85 |
| Editing Address Details | 86 |
| Viewing Address History | 86 |
| Opportunity Reports | 87 |
| Viewing Opportunity Summary Report..... | 87 |
| Viewing Opportunity Summary Report by Group..... | 88 |
| Viewing Opportunity Detail Report | 88 |
| Viewing Opportunity Exchange Report..... | 89 |

| | |
|---|-----|
| Viewing Opportunity Access Report..... | 90 |
| Viewing My Reports and Charts..... | 91 |
| Viewing Opportunity Chart by Close Date..... | 91 |
| Viewing Opportunity Chart by Status..... | 92 |
| Viewing Opportunity Chart by Win Probability..... | 92 |
| Quotes Tab..... | 93 |
| Searching for a Quote..... | 93 |
| Forecast Tab..... | 94 |
| Creating and Submitting Forecasts..... | 98 |
| Automatically Submitting Worksheets..... | 98 |
| Viewing Forecast History..... | 100 |
| Adding an Attachment (Forecast)..... | 100 |
| Adding a Note (Forecast)..... | 101 |
| Linking to Compensation..... | 102 |
| Opportunity Worksheet..... | 102 |
| Creating Opportunity Level Forecasts Using Opportunity Worksheets..... | 102 |
| Product Category Worksheet..... | 104 |
| Creating Product Level Forecasts Using Product Category Worksheets..... | 104 |
| Viewing Product Category History..... | 105 |
| Viewing Opportunity History..... | 106 |
| Generate Forecast..... | 106 |
| Forecast Reports..... | 107 |
| Viewing Forecast Summary by Product Category..... | 107 |
| Viewing Forecast Accuracy Report..... | 109 |
| Viewing Forecast Progression Report..... | 109 |
| Viewing Forecast Comparison Report..... | 110 |
| Viewing Forecast History Report..... | 111 |
| Viewing Forecast to Pipeline Summary Report..... | 112 |
| Viewing Forecast to Pipeline Trends Report..... | 112 |
| Creating a Report (Forecast)..... | 112 |
| Viewing Forecast History (Self) Chart..... | 113 |
| Viewing Forecast History (Subordinates) Chart..... | 113 |
| Customer Tab..... | 114 |
| Organization Summary..... | 116 |
| Personalizing Organization Summary..... | 116 |

| | |
|---|-----|
| Creating a New Organization | 117 |
| Maintaining Organization Details | 120 |
| Searching for an Organization | 123 |
| Creating and Maintaining Relationships (Organization) | 124 |
| Creating an Organization to Organization Relationship | 125 |
| Creating an Organization to Person Relationship | 126 |
| Creating a Customer..... | 127 |
| Maintaining Lead Details (Organization) | 128 |
| Creating and Maintaining Opportunities (Organization) | 130 |
| Notes (Organization) | 131 |
| Creating a Note (Organization) | 132 |
| Viewing a Note (Organization)..... | 133 |
| Sales Teams (Organization)..... | 134 |
| Adding a Sales Team Member (Organization)..... | 134 |
| Adding a Partner (Organization)..... | 135 |
| Adding a Resource Team (Organization)..... | 136 |
| Removing a Sales Team Member (Organization) | 137 |
| Tasks (Organization) | 138 |
| Creating a Task (Organization)..... | 139 |
| Adding an Attachment to a Task (Organization)..... | 140 |
| Interactions (Organization) | 141 |
| Viewing Interactions (Organization) | 141 |
| Attachments (Organization)..... | 142 |
| Adding an Attachment (Organization) | 143 |
| Viewing an Existing Attachment (Organization)..... | 144 |
| 360 Degree View (Organization) | 144 |
| Viewing 360 Degree View (Organization or Person)..... | 144 |
| Accounts..... | 145 |
| Creating Accounts (Organization or Person)..... | 145 |
| Maintaining Account Details (Organization or Person) | 147 |
| Viewing Account Sites (Organization or Person) | 148 |
| Viewing Account Roles (Organization or Person)..... | 150 |
| Viewing Account Relationships (Organization or Person)..... | 151 |
| Maintaining Quote Details | 152 |
| Contacts Subtab..... | 153 |

| | |
|---|-----|
| Personalize Contact Summary | 154 |
| Creating a Contact | 154 |
| Searching for a Contact | 156 |
| Maintaining Contact Details | 156 |
| Managing Relationship Notes | 157 |
| Managing Relationship Tasks | 159 |
| Managing Relationship Attachments | 161 |
| Searching for a Relationship Attachment: | 161 |
| Managing Relationship Interactions | 162 |
| Sending Collateral from the Contact Summary Table | 163 |
| Person Subtab | 163 |
| Person Summary | 164 |
| Personalizing Person Summary | 164 |
| Updating Person Summary Table | 165 |
| Creating a Person | 165 |
| Maintaining Person Details | 167 |
| Searching for a Person | 170 |
| Sending Collateral (Person) | 171 |
| Creating and Maintaining Relationships (Person) | 172 |
| Creating a Person to Organization Relationship | 172 |
| Creating a Person to Person Relationship | 174 |
| Leads (Person) | 176 |
| Maintaining Lead Details (Person) | 176 |
| Creating Opportunities (Person) | 179 |
| Notes (Person) | 180 |
| Creating a Note (Person) | 180 |
| Viewing a Note (Person) | 181 |
| Sales Teams (Person) | 182 |
| Adding a Sales Team Member (Person) | 182 |
| Adding a Partner (Person) | 183 |
| Adding a Resource Team (Person) | 184 |
| Removing a Sales Team Member (Person) | 185 |
| Tasks (Person) | 186 |
| Creating a Task (Person) | 186 |
| Maintaining Task Details (Person) | 188 |

| | |
|--|-----|
| Interactions (Person)..... | 190 |
| Viewing Interactions (Person)..... | 190 |
| Attachments (Person)..... | 191 |
| Adding an Attachment (Person)..... | 191 |
| Viewing an Existing Attachment (Person)..... | 192 |
| Accounts (Person or Organization)..... | 192 |
| 360 Degree View (Person)..... | 192 |
| Viewing 360 Degrees (Person)..... | 193 |
| Maintaining Quote Details..... | 193 |
| Customer Reports..... | 194 |
| Partner Tab..... | 194 |
| Create a Partner..... | 195 |
| Create a Person/Contact..... | 198 |
| Adding Partner Profile..... | 202 |
| Service Tab..... | 202 |
| My Company Tab..... | 202 |
| Compensation Tab..... | 203 |
| Fulfillment Tab..... | 204 |
| Sending Collateral..... | 204 |
| Encyclopedia Tab..... | 205 |
| Administration Tab..... | 206 |
| Registration Setup..... | 206 |
| Timeout Setup..... | 206 |
| Status Notification Setup..... | 207 |
| Channel Marketing Manager Setup..... | 207 |
| Profile Attribute Setup..... | 208 |
| Create Profile Attribute..... | 208 |
| Disable Profile Attribute..... | 208 |
| Setting Up Partner Attribute Values..... | 209 |

Send Us Your Comments

Oracle Partners Online Concepts and Procedures, Release 11i

Part No. A95219-02

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

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

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

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

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

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

Preface

Audience for This Guide

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

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

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

If you have never used Oracle Partners Online, Oracle suggests you attend one or more of the Oracle Partners Online 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*.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Partners Online.

- Understanding Oracle Partners Online provides an overview 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 Partners Online provides process-oriented, task-based procedures for using the application to perform essential business tasks.

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 Partners Online.

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 Partners Online 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 Partners Online.

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 Partners Online (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 Partners Online Implementation Guide

This guide explains how to implement the features of Oracle Partners Online. 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 Partners Online. This manual details additional steps and setup considerations for implementing Oracle Partners Online with this feature.

Multiple Organizations in Oracle Applications

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

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 Partners Online 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 Partners Online 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 Partners Online 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 Oracle[®] 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 Partners Online

Overview

Oracle Partners Online (POL) is also known as Oracle Partner Relationship Management (PRM). This topic group provides an overview of the application and its components, explains key concepts, features, and functions. This topic group also shows the application's relationship to additional Oracle and third-party applications.

Understanding Responsibilities & Profiles

In Oracle Partners Online users can access only the functionality needed to perform the tasks associated with their responsibility level.

Various levels of responsibility differentiate user access to specific functionality in this application.

1. **Vendor Users**
 - a. **Channel Manager**
 - b. **Assignment Managers**
 - c. **Channel Marketing Manger**
2. **Vendor Administrator**
3. **Partner User**
4. **Partner Administrator**
5. **VAD User**
6. **VAD Administrator**

Oracle Partners Online Foundation Requirements

Track Interaction History, including customer-agent interactions, which supports comprehensive customer information across departments and products.

Manage Territories which identify people who should be placed on sales teams, sales deals or service requests based upon qualifiers such as postal codes, product categories, expertise, etc.

Manage individual or group tasks assigned to vendor employees. Support Globalization including multi-currencies and multi-languages. Use Resource Manager to setup users, groups, teams, hierarchical relationships, and so forth. Create fulfillment requests to provide customers and partners with relevant company and product information.

Manage Notes which provide general or specific information about any organization, person or transaction in a summary view and all notes view. Notes management is used across all CRM (Customer Relationship Management) products. Add attachments to specific organizations, people or transactions as appropriate.

Vendor User

Vendor Users can have multiple roles such as Channel Manager, Channel Marketing Manager and Assignment Manager.

Channel Managers are the overall owner of the relationship with the partners. They support specific named partners or partners that have certain characteristics. Channel managers also assist in managing and the dissemination of information to and from partners.

Channel Marketing Managers are responsible for managing marketing activities executed in collaboration with partners.

Assignment Managers are responsible for assigning indirect opportunities to appropriate partners.

Vendor Administrator

The Vendor Administrator has access to Oracle Partners Online administrative setups to define custom profile attributes, attribute values, time-outs, status notification and partner user accounts.

Partner User

Partner access to Oracle Partners Online enables partners to perform the following tasks:

- View/Maintain their own profiles.
- Create and manage their customers.
- Create opportunities.
- View offered, active, inactive, won, and lost opportunities.
- Accept/decline an offered opportunity.
- Modify, update, and progress the opportunity after it is accepted.
- Create and manage forecasts.
- Create and manage quotes.
- View, modify and create service requests.

Partner Administrator

The Oracle Partners Online Administrator performs the following tasks:

- Create and manage users, logins and passwords.

VAD User

The VAD (Value Added Distributor) user performs the same types of tasks as the [Partner User](#), with the exception of the following:

- The VAD sees a partner tab link, that isn't available to the partner. The VAD can create and manage their own partners.
- The VAD can choose to work an opportunity themselves, or pass it to one of the smaller partners that they manage, without going through the vendor.

VAD Administrator

Just like the VAD user, the VAD Administrator has the same types of duties as the Partner Administrator, with the exception of the following:

- The VAD Administrator has the ability to create/manage users logins and passwords for all of the partners that they manage.

Navigation

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

Navigation Tips

| Item | How it works |
|-------------------|--|
| Tab | Tabs are the major navigation tool you can use to quickly go to another area of functionality. |
| Subtab | Subtabs are used to indicate further functionality under a tab. |
| Link or Hyperlink | Links are used to take you to another level of detail under the subtab. |
| Asterisks | Fields marked with an asterisk are mandatory to perform that particular function. |
| Page with Star | New items on a summary table are indicated by a page with a star next to it. |
| Round Blue Dot | Indicates record was updated by another user. |
| Lock icon | If you see a Lock icon next to an item in a summary table, it means that you do not have access to change or update the information for that item. |
| Quick Find | Select an item and enter a full or partial search string, using % as a wildcard. Click Go . |
| Advanced Search | Click the Advanced Search link and enter search filters, display options, and sort options. You can name the search and save it. |

Workflow and Email Alerts

Through Oracle Workflow, Oracle Partners Online increases vendor and partner efficiency by automatically updating routing statuses and automatically routing opportunities to and from various parties. Oracle Workflow features and notifications include:

- Automatic email alerts to channel manager to notify assignment of an opportunity to the partners that he/she manages.
- Automatic routing status update from matched to “offered” once the channel manager has approved the routing to the partner.
- Automatic routing of an opportunity (with an email notification) to the assigned partner upon approval of the CM.

- Automatic routing status update to active upon partner acceptance.
- Automatic routing status update to recycled partner declines the offered opportunity.

Tracking Opportunity Flow and Status

Features Associated with Opportunity Flow Steps:

1. **Create Opportunity:** Import Opportunities from Oracle Telesales. Enter manually into OTS or OSO. Enter manually into Oracle Partners Online.
2. **Match Opportunity with Partner:** Rank Partner, Automated Search, Manual Search.
3. **Assign Opportunity to Partners:** Options for routing single, serial, broadcast and joint selling.
4. **Channel Manager Reviews the Assignment:** Assignment options: approve, reject, or modify. CM timeout sends lead to partner.
5. **Partner Accepts/Declines Opportunity:** Partner accepts or declines the opportunity. If partner accepts, status changes to Active. If partner declines a single offer, it returns to unassigned pool. If partner declines a serial offer, it goes to the next partner.
6. **Process Partner:** Track Partner's progress with opportunity. Routing Status: on hold, won, lost, and recycled.

Routing status during opportunity flow:

1. **Create Opportunity:** Routing Status/Unassigned: Access/Vendor User, Phone Support.
2. **Match Opportunity with Partner:** Routing Status/matched: Access/Vendor Users if they enter the opportunity.
3. **Assign Opportunity to Partners:** Routing Status/matched: Access/Vendor Users if they enter the opportunity.
4. **Channel Manager Reviews the Assignment:** Routing Status/matched: Access/Vendor Users of the assigned Partner.
5. **Partner Accepts/Declines Opportunity:** Routing Status/offered: Access/Vendor and Partner Users.
6. **Process Partner:** Routing Status/active: Access/Vendor and Partner Users.

Opportunity assignments approved by the Channel Manager:

1. Workflow automatically changes routing status to offered and routes the opportunity to the partner.
2. The partner user can not update an routing status when it is in the offered status.
3. The opportunity assignment field in the opportunity summary page cannot be modified by the channel manager during the time period between the channel manager's acceptance and the partner's acceptance of the opportunity.
4. If the offer is declined and it is a single assignment offer, Workflow automatically re-routes it to the channel manager with recycled status.
5. If the offer is declined and it is a serial assignment offer, Workflow automatically re-routes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner.
6. If none of the partners accept the opportunity then the routing status is changed to "recycled" and is sent back to the assignment manager.

Terms and Definitions

Vendor User: Channel Manager/CM and Assignment Manager/AM.

Assignment Manager:

A vendor side role that has responsibility for assigning and routing opportunities to Partners.

Channel Manager:

Channel managers are the overall owners of the relationship with the partners. They support specific named partners or partners which have certain characteristics. Channel managers assist in managing and dissemination of information to and from partners.

Preferred Partner/VAD: The desired distributor specified by an end customer for a specific sales deal, even though the vendor may offer the deal to another partner.

Value Added Distributor/VAD: A partner who purchases from the vendor and resells to other resellers or to the end customer.

Value Added Reseller/VAR: A business partner managed by a vad or vendor; sometimes referred to simply as a partner.

Managed Partner: An organization or person who has a strategic agreement with the vendor to conduct certain transactions and is managed directly by the vendor.

Indirect Managed Partner/IMP: Smaller partner organizations that deal with VADs to purchase and resell specific vendor items. They don't have a direct relationship with the vendor.

Partner Contact: The primary contact for a partner, (the role responsible for administering all opportunities assigned to the partner) receives email notifications and accepts/declines opportunities on behalf of the partner.

Partner Timeout Period: Partner timeout is based on a partner's country; it is the time period during which a partner who has been offered an opportunity is expected to respond (accept/reject the opportunity) before the next action can occur. These time frames are user-defined and supported by Oracle Workflow through automatic emails, notifications, and routing status changes.

Single Assignment: In this routing option, the assignment manager assigns an opportunity only to the top ranked partner.

Serial Assignment: In this routing option, an opportunity is offered successively to the partners ranked highest to lowest, until an assigned partner accepts the opportunity.

Broadcast Assignment: In this routing assignment option, the assignment manager assigns an opportunity simultaneously to multiple partners, and whoever accepts the opportunity first is the partner that receives the opportunity.

Joint Selling: In this routing option, the AM offers an opportunity to multiple partners. Multiple partners can accept the opportunity and work together on it.

Tab Access

The functionality (for all users/Vendor, Partner and VAD) for Oracle Partners Online is organized by the following tabs.

- [Home](#)
- [Activity](#)
- [Fund Request](#)
- [Leads \(Vendor Only\)](#)
- [Opportunity](#)
- [Quote](#)

- [Forecast](#)
- [Customer](#)
- [My Company \(VAD & Partner Only\)](#)
- [Partner \(VAD & Vendor Only\)](#)
- [Service](#)
- [Compensation](#)
- [Fulfillment](#)
- [Encyclopedia](#)
- [Administration](#)

Home

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

Activity

The Activity tab can help to schedule and track related tasks, assignments, and activities. Tasks can be created and related to opportunities, organizations, and people. These tasks can be found in the task summary page, or in the details of the specific opportunity, organization, person or fund request.

For example, under the opportunities tab, the tasks created here are specifically related to a particular opportunity.

Fund Request

Partners can create requests (also known as Marketing Development Fund Requests) for funds from the vendor for particular activities.

Leads

Lead Management allows the vendor to create and manage leads. Indirect leads are sent to partners, by converting those leads into opportunities and assigning and routing them to specific partners.

Opportunities

Vendor:

Oracle Partners Online allows users to create, view and update sales opportunities. Users can enter various opportunity details such as customer, product interest, total budget, sales team, notes, tasks, attachments, etc. Vendor users can assign opportunities to appropriate partners by using partner matching engine. Vendor user can track status of an opportunity beginning to end.

Partner:

Partner users can view opportunities offered to them by vendor organizations. They have a limited view of the opportunity until they accept it. Upon acceptance of an opportunity, partner users get full access to opportunity details. Partner users can create their own opportunities as well.

Quotes

Vendor and partner users can convert an opportunity into a quote, configure quote lines, check availability, select pricing agreements, apply manual price overrides, print a quote and place an order.

Forecast

Oracle Partners Online allows vendor salespeople and partner users to generate product category and opportunity forecast worksheets. Resource hierarchy can be setup in such a way that partners users rollup into vendor organization via channel managers. This allows you to create global forecasts for multiple periods by taking partner forecasts into account.

Customer

The Customer subtab organization lists summary customer details. When the customer's organization name is selected, the main summary page appears with links to relationships, opportunities, notes, sales team, tasks, interactions, attachments and the 360 view. Only people on the customer sales team has access to this information.

The main page in organization detail, displays high level information, including addresses, customer category, annual revenue, total employees, year established, web site, lifetime value, sic code type and code, duns number, business line, tax id, fiscal year end and last order date.

Partner

Partner tab is available to the vendor and vad users. Using the partner tab, you can create and manage your partners. Oracle Partners Online allows you to define partner profile attributes under the administration tab. Using these custom defined profile attributes, you can maintain and track the profiles of your partners. Partner profile information is used during the opportunity partner matching process in order to route opportunities to the appropriate partners. Oracle Partners Online also allows you to create and maintain contacts for your partner organizations.

My Company

Partners see information about their company. The my organization subtab is organized into the following subtabs:

- [Main](#)
- [Relationships](#)
- [Notes](#)
- [Sales Team](#)
- [Interactions](#)
- [360 Degree View](#)

The company profile includes information about the fiscal year, annual revenue, last order date, tax id, web site, year established, and number of employees.

Personal profiles of partner contacts under the my contacts subtab shows addresses, phone numbers, and other details. This information is **View Only**.

Service

Partner and vendor users can access the solutions catalog to search for a solution. They can also create new service requests and view/update existing ones.

Compensation

Oracle Partners Online exposes the compensation tab from Oracle Incentive Compensation to the partner users. Partner contacts can be setup in the compensation hierarchy structure. Oracle Incentive Compensation supports the following:

- Ability for channel managers to assign quotas to partner users.
- Ability for partner users to provide feedback for quota planning.
- Ability for partner users to accept quotas online.

Fulfillment

Through integration with Oracle CRM Foundation One-to-One Fulfillment, users can send collateral to their contacts and prospects.

Encyclopedia

Through integration with the Marketing Encyclopedia system, sales and marketing professional can organize corporate information into categories and channels for use by the sales force and by partners. MES users can setup groups to swiftly publish content to appropriate users.

Administration

This tab enables the vendor administrator to setup status notification, time-outs, user registration, attributes, attribute values, the channel marketing manager and channel types setups.

Using Oracle Partners Online

Getting Started

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

- [Setting User Profiles and Preferences \(set personalization options and preferences\)](#)
- [Account Settings \(change your password\)](#)
- [Personalization \(set personal preferences\)](#)
- [Oracle Partners Online Preferences \(set Oracle Partners Online preferences\)](#)

Setting User Profiles and Preferences

Use the Profile page to change your password, set personalization options, and set Oracle Partners Online preferences.

Navigate to the Profile page by clicking the **Profile** icon at the top right of the application page. By default, the page opens to the Personal Profile page. Use the Personal Profile subtab under Account Settings to change your password.

Changing Your Password

From the Personal Profile subtab, enter a new password in the password field. Enter it again in the Re-enter Password field. Click **Update**.

Note: You cannot update your user name.

You can also set the following from the profile page:

- Personalization
- Oracle Partners Online Preferences

Personalization

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

To set or change your preferences, click the **Preferences** subtab located at the left side of the Profile page. Please remember, you must click **Update** after changing information in each page. The following preferences can be set or changed from this subtab:

- [Current Responsibility](#)
- [Default Responsibility](#)
- [Display Style](#)
- [Language](#)
- [User Currency](#)
- [Date Format](#)
- [Table Display \(rows per page and blank rows per table\)](#)

Current Responsibility

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

Default Responsibility

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

Display Style

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

Language

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

User Currency

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

Date Format

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

Table Display

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

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

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

Setting Oracle Partners Online Preferences

Steps

To set or change Oracle Partners Online preferences, choose the **Profile** icon in the upper right of the application page to navigate to the Profile page. Click a **Oracle Partners Online Preference** link to set the following preferences:

- [General Preferences](#)
- [Home Page Preferences](#)

The following preferences are set within each individual tab:

- [Activity Preferences](#)
- [Leads Preferences](#)
- [Opportunity Preferences](#)
- [Forecasting Preferences](#)
- [Customer Preferences](#)
- [Compensation Preferences](#)
- [Favorite Bin Preferences](#)
- [Calendar Preferences](#)

Setting General Preferences

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

Steps

To set or change General preferences, choose the Profile icon at the top right of the application page to navigate to the Profile page. Under the Oracle Partners Online Preferences region, click the General link.

Default Country: From the drop down list, choose the default country that will be used throughout the application.

Default Role: From the drop down list, choose which role you want as your default. If you have more than one role, this role will appear as the default.

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

Display Notes for Listen' Days: Enter the number of past days for which you want to display notes.

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

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

Click **Update** to save your changes.

[Back to Setting Oracle Partners Online Preferences](#)

Setting Home Page Preferences

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

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

Steps

To set or change Home Page preferences, choose the Profile icon at the top right of the application page to navigate to the Profile page. Under the Oracle Partners Online Preferences region, click the Homepage link.

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

Under Bin Preferences, you can configure up to four bins on your home page; the bins include New Leads, Won Opportunities, Open Opportunities, Activity, and My Forecasts. The Won Opportunities bin does not require you to indicate win probability, sales stage, or status. The New Leads bin is populated via the Oracle TeleSales application.

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

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

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

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

Click **Update** to save your changes.

[Back to Setting Oracle Partners Online Preferences](#)

Your Home Page

The Home Page consists of the following subtabs; Home, News, and Tools.

The following are brief descriptions of each subtab:

- **Home**-You can view different summary reports and charts from your home page by indicating your preferences in Profiles > Homepage. You can use the Territory lookup tool by clicking the Territory Lookup button.

- **News**-Display news information from the Marketing Encyclopedia System such as world, industry, internal, and competitor news from your homepage. Indicate your preferences in Profiles > Homepage.
- **Tools**-includes the Territory Lookup Tool. See Below:

Using the Territory Lookup Tool

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

Steps

Follow these steps to use the Territory Lookup Tool:

1. Enter an organization name, click **Go**.
2. Select an organization from the search results page.
3. Optionally, select a country from the drop down list.
4. Optionally, select a state from the drop down list.
5. Optionally, enter a postal code.
6. Optionally, enter an area code.
7. Click **Search**.

Activity Tab

The Activity tab includes the Activity and Calendar subtabs. You can use the Activity tab to manage your tasks, appointments, and calendar. The summary task view, "My Tasks", shows all the tasks that are assigned to you.

You can perform the following functions from the Activity tab:

- [Personalize task summary](#)
- [Use the calendar](#)
- [Create a task](#)
- [Maintain task details](#)
- [Search tasks](#)

- [Create a quick task](#)
- [Search for a quick task](#)
- [Add an attachment to a task](#)

Personalizing Task Summary

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

Prerequisites

None

Steps

Follow these steps to define your personal list of tasks:

1. Click **Personalize**.
2. Change, add, or remove parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search**.
 - Saved Searches appear in a drop down list on the Activity page.

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

Using Calendar Views

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

- Daily View
- Weekly View
- Monthly View

- Yearly View
- Combination View
- Availability
- Public Calendar
- Appointments

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

Creating a Task

Prerequisites

None

Steps

Follow these steps to create a task:

1. Click the **Activity** tab.
2. Click **Create**.
 - The Create Task page opens.

The following table describes the Task Detail fields.

Task Detail Fields

| Field | Required Field | Description |
|------------------|-----------------------|---|
| Task Type | Yes | Select the task type from the drop down list. |
| Private | No | Select the private check box if you want the task to be viewable only by the creator of the task. |
| Task Name | Yes | Enter the task name. |
| Task Description | No | Enter a description. |
| Priority | No | Select priority from the drop down list. |
| Date | Yes | Select a date by clicking the calendar and choosing a date. |
| Start Time | No | Select a time from the drop down lists. |

| Field | Required Field | Description |
|--------------|----------------|--|
| Owner | Yes | Enter the full or partial name, using % as a wildcard, and click Go . Select from the search results. |
| Status | No | Select the task status from the drop down list. |
| End Time | No | Select an end time for the task from the drop down list. |
| Add Attendee | No | Select attendees by entering the full or partial name and clicking Go . |
| Remove | No | To remove an attendee, select the remove check box. |
| Employee | No | Displays the employee who is listed as an attendee. |
| Sales Group | No | Displays the sales group the attendee belongs to. |
| Job Title | No | Displays the job title of the attendee. |
| Phone Number | No | Displays the phone number of the attendee. |
| Email | No | A link to the attendee's email. |
| Remove | No | Select the remove check box to remove a relate to item. |
| Type | No | Displays the related item type. |
| Name | No | Displays the related item name. |
| Task Name | No | Links to the child task details. |
| Task Type | No | Displays the child task type. |
| Date | No | Displays the child task date. |

3. Click Create.

Maintaining Task Details

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

Prerequisite

A task must exist.

Steps

Follow these steps to maintain task details:

1. From the **Activity** tab, locate the task that you want to edit.
 - To edit task details from the summary page, edit details directly on the summary page and click **Update**.
- To search using **Quick Find**:
 1. Choose Task from the drop down list.
 2. Enter the full or partial task name.
 3. Click **Go**.
- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Task Search page opens.
 3. Enter desired **Task Information** and **Display Options**, and click **Search**.
- You will see the Task Search Results page.
 1. Select the task by clicking the task link.
 2. Alternatively, click the Modify Search button change your search filters and display options.

The following table describes the Task Detail fields.

Task Detail Fields

| Field | Required Field | Description |
|------------------|-----------------------|---|
| Task Type | Yes | Select the task type from the drop down list. |
| Private | No | Select the private check box if you want the task to be viewable only by the creator of the task. |
| Task Name | Yes | Enter the task name. |
| Task Description | No | Enter a description. |
| Priority | No | Select priority from the drop down list. |
| Date | Yes | Select a date by clicking the calendar and choosing a date. |
| Start Time | No | Select a time from the drop down lists. |

| Field | Required Field | Description |
|---------------------|----------------|--|
| Parent Task | N/A | View the parent task details by clicking the link. |
| Owner | Yes | Enter the full or partial name, using % as a wildcard, and click Go . Select from the search results. |
| Status | No | Select the task status from the drop down list. |
| End Time | No | Select an end time for the task from the drop down list. |
| Add Attendee | No | Select attendees by entering the full or partial name and clicking Go . |
| Remove | No | To remove an attendee, select the remove check box. |
| Employee | No | Displays the employee who is listed as an attendee. . |
| Sales Group | No | Displays the sales group the attendee belongs to. |
| Job Title | No | Displays the job title of the attendee. |
| Phone Number | No | Displays the phone number of the attendee. |
| Email | No | A link to the attendee's email. |
| Primary Relate To | No | If you want to relate the task to another item, select from the drop down list, enter the full or partial name and click Go . |
| Secondary Relate To | No | If you want to relate the task to an additional item, select from the drop down list, enter the full or partial name and click Go . |
| Remove | No | Select the remove check box to remove a relate to item. |
| Type | No | Displays the related item type. |
| Name | No | Displays the related item name. |
| Task Name | No | Links to the child task details. |
| Task Type | No | Displays the child task type. |
| Date | No | Displays the child task date. |

3. Click **Update**.

Searching for a Task

Steps

Follow these steps to search for a task:

1. From the **Activity** tab, select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Task from the drop down list.
 2. Enter the full or partial task name using % as a wildcard.
 - Please note, to enter a search string, enter quotation marks around the search phrase you want to find. For example, to search for to do tasks, enter "to do".
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Task Search page opens.
 2. Enter desired **Task Information** and **Display Options**.
 3. Click **Search**.
 4. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Task Search Results page.
 1. Select the task by clicking the task link.
 - Alternatively, click the Modify Search button change your search filters and display options.

Creating a Quick Task

Steps

Follow these steps to create a quick task:

1. Click **Create**.

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

Searching for a Quick Task

Prerequisite

None

Steps

Follow these steps to search for a quick task:

Search for quick tasks using **Advanced Search**:

1. From the **Activity** tab, click the **Advanced Search** link.
 - The Task Search page opens.

2. Enter desired **Task Information** and **Display Options**, and click **Search**.
 - The Task Search Results page opens.
3. Select the task by clicking the task link.

Adding an Attachment to a Task

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

Prerequisite

A task must exist.

Steps

Follow these steps to add an attachment to a task:

1. From the **Activity** tab, locate the task for which you want to add an attachment.
 - To search using **Quick Find**:
 1. Choose Task from the drop down list.
 2. Enter the full or partial task name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Task Search page opens.
 3. Enter desired **Task Information** and **Display Options**, and click **Search**.
 - The Task Search Results page opens.
 1. Select the task by clicking the task link.
 2. Click the **Attachments** link.
 3. Click **Add**.
 - The **Add Attachment** page opens.
 1. Enter a description, and click **Text**, **File**, or **URL**.
 - Enter text
 - Click **Browse** to search for a document

- Enter the URL
2. Click **Create**.

Fund Request Tab

The Fund Request tab allows the partner to create MDF requests (in the form of campaigns) to request funds from the Vendor to support specific marketing activities.

Viewing and Editing a Campaign (Fund Request)

Prerequisites

Log in as the Vendor or Partner User/ Administrator and navigate to the following

Funds Request > Funds Requests

Steps

1. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Advanced Search.
2. Click the Campaign link to view or edit. The Campaign Details Page displays.
3. The fields on the Campaign Details Page are:
 - **Name:** Your organization may have a campaign naming convention.
 - **Program:** A campaign may be associated with a Program from the Campaign Details page.
 - **Status:** Of the Campaign.
 - **Type:** The Campaign's type.
 - **Source Code:** This is best left blank for the system to complete.
 - **Business Unit:** Select for a list of business units of the organization.
 - **Version:** A method for tracking version of a campaign.
 - **Purpose:** Select from a list of purposes which may be useful in further categorizing campaigns.
 - **Start and End Periods:** Campaign start and end dates.

- **Start and End Dates:** These are the dates during which the Campaign may be available for use.
- **Currency:** This is the default currency for monetary aspects of the Campaign.
- **Priority:** Select from a list of priorities.
- **Owner:** The creator of the Campaign is the default owner. Click Go to select a different person as the Campaign's owner.
- **Global:** Check this box if the Campaign is to extend beyond the displayed Country.
- **Language:** Select a language for the Campaign.
- **Template:** Check the Template box if this Campaign is used as a template for creating new Campaigns.
- **Description:** Campaign Description.

Creating a Campaign (Creating a Fund Request)

Prerequisites

Custom Setups, Marketing Mediums and Campaign Activities must have been created.

Log in as the Vendor or Partner User/Administrator and navigate to the following
Funds Request > Funds Requests

Steps

1. Click Create.
2. Select a Setup Type by clicking Go at the end of the Field. The Setup Type refers to Custom Setups created by the Vendor Administrator in the Administration Tab. After selecting a Setup Type, the page will redisplay. There may be additional fields displayed as well as fields that are removed from view (defaulted for the Partner user).
3. Give the Campaign a Name. Your organization may have a campaign naming convention.
4. If this Campaign is to be part of an existing Program, click Go at the end of the Program field and select a Program to associate the Campaign with (hidden from the Partner user).

5. Source Code. This is best left blank for the system to complete.
6. Business Unit. Select for a list of business units of the organization.
7. Version. A method for tracking version of a campaign.
8. Purpose. Select from a list of purposes which may be useful in further categorizing campaigns.
9. Start and End Periods. These are accounting periods during which the Campaign may be available for use (hidden from the Partner user).
10. Start and End Dates. Campaign start and end dates.
11. Currency. This is the default currency for monetary aspects of the Campaign.
12. Priority. Select from a list of priorities.
13. Owner. The creator of the Campaign is the default owner. Click Go to select a different person as the Campaign's owner.
14. Global. Check this box if the Campaign is to extend beyond the displayed Country.
15. Language. Select a language for the Campaign.
16. Template. Check the Template box if this Campaign is used as a template for creating new Campaigns.
17. Description. Adding a Description helps fill in the details not immediately viewable on this page.
18. Click Create. You will receive confirmation that a new campaign has been created.

Copy a Campaign (Fund Request)

Use this procedure to copy an existing Campaign.

Prerequisites

Log on as the Partner or VAD User/Administrator and navigate to the following:

Fund Request > Funds Requests

Steps

1. Select the link for the Campaign to be copied.

2. Click Copy. The Campaign Details page appears.
3. Make sure that the campaign to be copied appears in the Source Campaign field. If it doesn't, select it using the list of values (LOVs).
4. Enter a name for the new campaign.
5. Enter the dates the new campaign is effective.
6. In the Select Attributes for Copying region, select the check boxes of the items to copy to the new campaign. Only the attributes populated with data appear on the list.
7. Click the Copy Now button. The new campaign is created.

Create a Campaign Budget

Use this procedure to create a Campaign Budget.

Prerequisites

The budget(s) from which funds are requested from must be approved and have a status of active. Likewise any campaigns that are tapped for funds must be approved and active.

Log in as the Partner User/Administrator and navigate to the following:

Fund Request > Campaigns Subtab

Steps

1. Use the Name list of values (LOV) to select the funding source.
2. In Request Amount, enter the amount you are requesting.
3. Click Update. When the status of a campaign or event changes from Planned to Active, Oracle Marketing Online sends a request for approval of the request to the budget owner. While the funds are pending, the campaign status remains Submitted for Budget Approval.
4. A notification will be received at your Personal Home Page when the budget owner approves or rejects the campaign. If the budget is approved, then the status of the campaign becomes Available. If the budget is denied, then the status becomes Denied Budget Approval.

Campaign Schedules

Use the following set of procedures to create, view or edit Campaign Schedules.

Prerequisites

Log in as the Partner User/Administrator and navigate to the following:

Funds Request Tab > Campaign Details > Execution Link > Campaign Schedule Link

Viewing a Campaign Schedule

Prerequisites

An existing Campaign Schedule.

Funds Request Tab > Campaign Details > Execution Link > Campaign Schedule Link

Steps

1. The Campaign Schedule table displays the schedules that have been created for this Campaign.
2. Click the link in the Name column to display the details for that Campaign Schedule.

Editing a Campaign Schedule's General Details

Prerequisites

An existing Campaign Schedule.

Funds Request Tab > Campaign Details > Execution Link > Campaign Schedule Link

Steps

1. Click the link in the Name column to display the details for that Campaign Schedule.
2. The Campaign Details are displayed at the top of the page.
3. The Schedule Details displays the following fields:

- Name.
 - The Use Parent Source Code box is checked if the Schedule will use the Campaign's Source Code.
 - Coordinator. The person responsible for the Schedule.
 - Source Code. This can be unique to the schedule or if the Use Parent Source Code checkbox is selected, this will match the Source Code for the Campaign.
 - Activity Type and Activity. This are set when the Schedule is created and may not be modified.
 - Marketing Medium. The marketing channel the Schedule is processed through.
 - Currency.
 - Time Zone. This is the time zone for the geographic location where the Schedule Activity will be taking place.
 - Start and End Dates and Start and End Times.
 - Objective.
 - Priority.
 - Language the Schedule should be carried out in.
 - Description.
4. Click Update to save your changes. A Confirmation message is displayed.

Creating a Campaign Schedule

Campaign Schedules may have many different components as determined by the Activity Type and Activity and defined in Custom Setup on the Administration tab. Your Campaign Schedule may not have all the Side Panel Menu items listed.

Campaigns Schedules are created to execute Campaign Activities. These Activity types are setup during implementation.

Activities can created and executed from the Details page within the Campaign Schedule.

Prerequisites

An existing campaign.

Funds Request Tab > Execution Subtab > Campaign Schedule Link**Steps**

Click the Campaign link to display the Campaign Details Page

1. Click Create.
2. Select a Setup Type for the Campaign Schedule. The Setup Types are created by your system administrator. The Create Campaign Schedule page will redisplay after selecting a Setup Type to update the Activity Type and Activity fields. If the Activity Type can utilize a Trigger, the Trigger Details section will be added to the Create Campaign Schedule page (defaulted for the Partner user).
3. Enter a Name for the Campaign Schedule.
4. Select a Language to be used to for the Campaign Schedule execution.
5. Use Parent Source Code is checked by default. If creating multiple Schedules for a particular Campaign, it may be useful to have unique source codes for each schedule. Deselect the Use Parent Source Code checkbox to generate a unique Source Code for the Campaign Schedule. If left checked, the Source Code for the Campaign will be used.
6. The Coordinator is the person responsible for the execution of the Campaign Schedule.
7. The Source Code field should be left blank. The system will insert the Campaign Source Code or generate a unique Source Code for the Campaign Schedule.
8. The Activity Type and Activity are determined by the Setup Type and may not be modified.
9. Select a Marketing Medium if desired. Certain execution channels, such as Oracle Advanced Outbound, require particular Marketing Mediums to be selected for a Campaign Schedule.
10. Select a Currency for the Campaign Schedule.
11. Select a Time Zone for the geographic location where the Schedule Activity will be taking place.
12. Enter Start and End Dates and Start and End Times.
13. Select an Objective.

14. Select a Priority. The priority will determine which Schedules executing at the same time are executed first.
15. Enter a Description.
16. Click Create.
17. Click Create. The Campaign Schedule Details Page with the Side Panel Menu displays.

Lead Tab

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

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

Leads may be generated through different sources:

- Marketing: Based on marketing campaigns and trade shows, leads may be generated. These leads can be imported into the system through Lead Import.
- TeleSales: TeleSales agents record lead information from phone calls into the system.
- Field Sales: Field Sales representatives record lead information from the field into the system.

The following functions are available from the Leads tab:

- [Personalize summary page](#)
- [Create a lead](#)
- [Maintain lead details](#)
- [Search for a lead](#)
- [Route or assign a lead](#)
- [Rank a lead](#)

- [Qualify a lead](#)
- [Attach a contact to a lead](#)
- [Create lead notes](#)
- [Create lead tasks](#)
- [Create lead attachments](#)
- [Convert a lead to an opportunity](#)
- [Link a lead to an opportunity](#)
- [Add a sales team member](#)
- [Add a sales team partner](#)
- [Add a sales team resource](#)

Personalizing Leads

Prerequisites

None

Steps

Follow these steps to personalize leads:

1. From the Leads tab, make sure you are on the Leads subtab.
2. Click **Personalize**.
 - The Leads page opens.
3. Change, add, or remove search parameters.
4. Change, add, or remove display options.
5. Change, add, or remove sort options.
6. Enter a Search Name.
7. Optionally, select the “Use as Summary Page Default” check box.
8. Click **Save to save the search without applying it, or Save and Apply Search to save and apply the search**.
 - Saved Searches appear in a drop down list on the Leads summary page.

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

Creating a Lead

Prerequisites

None

Steps

Follow these steps to create a lead:

1. From the **Leads** tab, make sure you are on the **Leads** subtab.
2. Click **Create**.
 - The Create Lead page opens.
3. Select a customer by typing the full or partial name using % as a wildcard.
4. Select a location from the drop down list.
5. Click **Go**.
 - If you do not find the customer for which you wish to create a lead, click **Create Customer**.
6. From the search results page, select the radio button.

Optionally, select “Return Name and Address” to attach the address from the selected line to the lead.

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

The next items are optional and are in no specific order.

- In the Purchase Items section, enter a Product Category and click **Go**.
 - Enter an Item ID, click **Go**.
 - Enter the unit of measure, quantity, and budget amount.
 - Enter a Campaign and click **Go**.
7. Click **Create**.

Maintaining a Lead

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

Prerequisites

A lead must exist.

Steps

Follow these steps to modify or update an existing lead:

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

The following table describes the Lead Detail fields.

Lead Detail Fields

| Field | Required Field | Description |
|-------|----------------|------------------|
| Name | No | Read only field. |

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

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

Purchase Items-Lead Detail Fields

| Field | Required Field | Description |
|------------------|----------------|--|
| Remove | No | Select the remove check box to remove the purchase item. |
| Product Category | Yes | This field is required if you are entering purchase items. |
| Item ID | No | This field is determined by the product category. |
| Unit of Measure | No | View the unit of measure. |
| Quantity | No | Enter the quantity. |
| Budget Amount | Yes | Required if a purchase item is entered. |
| Campaign | No | Enter the full or partial name and click Go . |

2. Click **Update** to save any changes.
3. Additionally, the links at the top of the page take you to further details about the lead.
 - **Contacts**-maintain contact information
 - **Sales Team**-maintain sales team information
 - **Tasks**-maintain tasks related to the lead
 - **Notes**-maintain notes related to the lead
 - **Attachments**-maintain attachments related to the lead
 - **Opportunities**-view opportunities related to the lead
4. Click **Update** to save any changes.

Searching for a Lead

Prerequisite

A lead must exist.

Steps

Follow these steps to search for a lead:

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

Routing or Assigning a Lead

A lead is re-routed by selecting another member of the sales force from the “Assign To” list of values.

Steps

Follow these steps to re-assign a lead:

1. From the Lead tab, find the lead you want to re-assign.
2. Click the lead link to display the lead details.
3. In the Assign To field, enter a search string and click Go.

Optionally, clear the Assign To field and let the Resource Manager re-assign the lead automatically.

4. From the list of values, select the sales team member you want to re-assign the lead to.

5. Click **Update**.

Ranking a Lead

Lead ranking is the initial evaluation of the quality of information entered about this lead. Since lead ranking occurs “behind the scenes”, the user cannot affect the initial ranking of a lead. The lead is scored by a scorecard that is set up within Lead Importing. This score is then compared against the values in the Lead Rank Mapping setup screen

Qualifying a Lead

Prerequisites

None

Steps

Follow these steps to indicate that a lead is qualified:

1. From the **Leads** tab, make sure you are on the **Leads** subtab.
2. You can create a new lead, select a lead by clicking a lead link, or use Quick Find or Advanced Search to find an existing lead.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name using % as a wildcard.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
 1. Enter desired **Lead Information** and **Display Options**.
 2. Click **Search**.
 3. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.

1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
1. From the Lead Detail page, select the Qualified check box.
2. Click **Update**.

Attaching a Contact to a Lead

Prerequisites

A lead must exist.

Steps

Attach a contact to a lead by following these steps.

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

2. Add a contact by entering the full or partial name in the Add a Person field and clicking **Go**.
3. To remove a contact, select Remove and click **Update**.
4. To edit information directly onto the summary table, change the information.
5. Click **Update**.

Creating a Note (Lead)

Steps

Follow these steps to create a lead note:

1. From the Leads tab, make sure you are on the Leads subtab.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
 1. Enter desired **Lead Information** and **Display Options**.
 2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
 1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
 1. Click the Notes link.
 - To view all notes:
 1. Click **All Notes**.

2. Select the note type from the drop down list.
3. Enter the note text in the text box.
 - To view note history:
 1. Select the type by choosing from the drop down list.
 2. Select a date range by clicking the Calendar icon and choosing a date range.
 3. Click Apply.
 4. Click **Update** to add the note you have entered.

Creating a Task (Lead)

Steps

Follow these steps to create a lead task:

1. From the Leads tab, make sure you are on the Leads subtab.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
 1. Enter desired **Lead Information** and **Display Options**.
 2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
 1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
 1. Click the Tasks link.

2. Click **Create**.
3. Enter task details.
4. Click **Update** to add the task.

Creating an Attachment (Lead)

Steps

Follow these steps to create a lead attachment:

1. From the Leads tab, make sure you are on the Leads subtab.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
 1. Enter desired **Lead Information** and **Display Options**.
 2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
 1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
 1. Click the Attachments link.
 2. Click **Add**.
 3. Select a file, enter text, or enter the URL to attach.
 4. Click **Update** to add the attachment.

Converting a Lead to an Opportunity

Prerequisites

A lead must exist.

Steps

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

1. From the Leads tab, make sure you are on the Leads subtab.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
 1. Enter desired **Lead Information** and **Display Options**.
 2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
 1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
 1. Click the **Lead to Opportunity** button.
 - The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
 - 2. Click **Create Opportunity**.

Linking a Lead to an Opportunity

You can link leads to opportunities through the Leads tab.

Prerequisites

The lead and the opportunity must exist.

Steps

Follow these steps to link a lead to an opportunity:

1. From the Leads tab, make sure you are on the Leads subtab.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
 1. Enter desired **Lead Information** and **Display Options**.
 2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
 1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
 1. Click the **Lead to Opportunity** button.
 - The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
 1. Choose the **Select** button to indicate the opportunity you have selected.
 - The Lead Linking Opportunity Detail page opens.
 1. Click the **Link to Opportunity** button.

Sales Teams (Leads)

You can perform the following functions for sales teams:

- [Add a sales team member](#)
- [Add a partner to a sales team](#)
- [Add a resource team to a sales team](#)

Adding a Sales Team Member (Leads)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

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

3. Enter the last name or partial name of the sales representative in the “**Add a Salesperson**” field, click **Go**.
4. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.
5. Select the “Select” check box.
6. Click **Select**.
The salesperson will be added to the Sales Team summary table.
7. Enter the territory properties, and click **Go**.
8. Select a Role from the drop down list.
You can view the email address and phone number for this salesperson.
9. Click **Update**.

Adding a Partner to a Sales Team (Leads)

Prerequisites

None

Steps

If you want to add a partner to the sales team:

1. From the Leads tab, make sure you are on the Leads subtab.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.
1. Enter desired **Lead Information** and **Display Options**.

2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
1. Click the **Sales Team** link.
2. Enter the partner name in the “Add a Partner” field, click **Go**.
3. Select a partner from the search results page by clicking the link.
4. Click **Update**.
 - You can choose only from a list of partners whose organizations are specifically defined as a “sales” partner. Refer to the *Oracle Partners Online Concepts and Procedures* Guide for more detailed information.

Adding a Resource Team to a Sales Team (Leads)

Prerequisites

None

Steps

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

1. From the Leads tab, select a lead.
2. Select a lead either by clicking the lead link, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Lead from the drop down list.
 2. Enter the full or partial lead name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Lead Search page opens.

1. Enter desired **Lead Information** and **Display Options**.
2. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - You will see the Leads Search Results page.
1. Select the lead by clicking the lead link.
 - The Lead Detail page opens.
1. Click the **Sales Team** link.
2. In the “Add a Resource” field, enter the resource name or the wildcard (%) and click **Go**.
3. Select a resource from the search results page by clicking the link.
4. Click **Update**.
 - Each member of the resource team will be added to the sales team table.

Opportunity Tab

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

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

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

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

The following tasks can be performed from the Opportunity tab:

- [Personalize opportunity summary](#)
- [Create an opportunity](#)
- [Maintain an opportunity](#)
- [Search for an opportunity](#)
- [Copy an opportunity](#)
- [Create a quote from an opportunity](#)
- [Create and maintain sales credits](#)
- [Create and maintain contacts](#)
- [Create and maintain notes](#)
- [Create and maintain sales teams](#)
- [Create and maintain tasks](#)
- [Create and maintain classifications](#)
- [Create and maintain competitors](#)
- [Create and maintain attachments](#)
- [Opportunity Matching](#)
- [Accepting/Declining an Opportunity Assignment](#)
- [Assigning an Opportunity](#)
- [Accepting/Declining an Offered Opportunity](#)
- [Updating an Active Opportunity](#)
- [Assigning a Sales Team to an Opportunity](#)
- [Adding/Removing a Salesperson](#)
- [Manage addresses](#)
- [View opportunity reports](#)

Personalizing Opportunity Summary

If you want to create personalized opportunity lists, for example, “My Opportunities Closing This Week” or “My Opportunities in Stage 3” follow the

steps outlined below for personalizing. The lists that you create can be used as a summary page default so that they appear every time you click the Opportunity tab.

Steps

Follow these steps to personalize opportunities:

1. From the **Opportunity** tab, click **Personalize**.
2. Change, add, or remove parameters.

The following is a description of the “Include Account Manager Privilege” check box and how it works:

If a sales rep is an account manager for an organization, then he/she has access to all opportunities created for that organization.

The “Include Account Manager Privilege” check box is important if the person running the advanced search is either an account manager OR if someone in their sales hierarchy has the “account manager” privilege.

If the “Include Account Manager Privilege” check box is selected, the Advanced Search feature will display all opportunities for which:

- the user is on the sales team
- direct or indirect subordinates are on the sales team
- all opportunities for the organization for which the user is an account manager
- all opportunities for the organization for which a direct or indirect subordinate is an account manager

If the “Include Account Manager Privilege” check box is not selected, the Advanced Search feature will display opportunities for which:

- the user is on the sales team
- subordinates are on the sales team

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

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

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

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

Creating an Opportunity

Prerequisites

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

Steps

Follow these steps to create a new opportunity:

1. From the Opportunity tab, make sure you are on the Opportunity subtab.
2. Click **Create**.

The Create Opportunity page opens.

3. Use the **Select a Customer** field and enter the full or partial name of the organization or person that you want to find. By default the system will search for organizations.
4. If the customer is located in a country outside of your country, select that country from the drop down list, click **Go**.

The **Select a Customer** page opens with the search results.

5. If you are searching for a person, instead of an organization, select the **Person** radio button and click **Go**.
6. Select a customer by clicking the customer link or **click Cancel to return to the previous page**.
7. If you do not find the customer that you are searching for, click **Create Customer**. Enter the customer information and click **Create**.

The Create Opportunity page opens.

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

9. Enter an opportunity name, this value will be used throughout Oracle Partners Online to select and view opportunities.
10. Optionally, relate this opportunity to an existing project. Select the project and click **Go**. If you want to create a new project, select the Create a Project radio button and enter a project name.
11. Optionally, relate a campaign or offer to this opportunity. Enter the campaign name and click **Go**. You will also see a list of offers with the list of campaigns. Choose either the campaign or the offer.
12. Optionally, enter purchase items by selecting a Product Category and Amount. Please note, if you do not select a product category, that line will show a blank when you create the opportunity. You can search for inventory items by selecting a product category, entering a partial inventory item name and clicking **Go**. Choose from the list of inventory items. Additionally, select a Unit of Measure.

The list of Inventory Items is limited to the items that are mapped to the product category that you select. If product category is blank, you will see a full list of inventory items. When you choose an item, product category will be populated.

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

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

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

You have created the opportunity when the Opportunity Detail page opens. You can change data, enter additional information, go to the customer detail by clicking the customer name link.

Maintaining Opportunity Detail

Prerequisites

An opportunity must exist.

Steps

Follow these steps to maintain opportunity details:

1. You can access existing opportunities one of the following ways:
By clicking the opportunity's name link from the summary page, or:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial opportunity name.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter desired **Task Information** and **Display Options**.
 2. Optionally, enter a Search Name, if you want to save the search.
 3. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 - The Opportunity Search Results page opens.
 1. Select the opportunity by clicking the opportunity link. Alternatively, click **Modify Search** change your search filters and display options.
 2. Add or update information such as Status, Sales Methodology, Win Probability, Close Date, Initiatives, Currency, Channel, Sales Stage, Budget, Transaction Amount by either selecting from the drop down list or entering information into the fields.

The opportunity freeze flag facilitates the opportunity lock out feature for this specific opportunity. Once this check box is selected, no one on the sales team is allowed to update the opportunity. This Freeze check box overrides all access privileges. However, users whose "Update Frozen Opportunities" profile option is set to Y (Yes) can update frozen opportunities and deselect the Freeze

check box. For more information about changing a profile option, refer to the *Oracle Partners Online Implementation Guide*.

3. From the Opportunity Detail main page, you can enter Purchase Items. Click the Add Purchase Item button to start the process. Required fields are marked with an asterisk.
 - The Opportunity Add Purchase Item page opens.
 1. Select the Product Category from the drop down list.
 2. Enter an Amount.
 3. Optionally, enter the following:
 - Inventory Item: enter a partial item name and click **Go**
 - Unit of Measure (UOM): enter a unit of measure
 - Quantity: enter a quantity
 - Campaign: enter a partial campaign name and click **Go**
 - Number of Purchase Lines: enter the number of purchase lines you would like for rolling opportunities
 4. You can select Forecast Date Intervals for rolling opportunities by selecting a Start Date and entering the Number of Days in the appropriate fields.
 5. Click **Add** to create multiple purchase lines with forecast dates in the above mentioned intervals.
4. Click **Update to save any changes**.
 - Additionally, from the Opportunity Detail main page, you can access further details about the opportunity by clicking links to Contacts, Notes, Sales Team, Tasks, Classifications, Competitors, and Attachments.

Searching for an Opportunity

Prerequisites

An opportunity must exist.

Steps

Follow these steps to search for an opportunity:

1. From the **Opportunity** tab, select **Quick Find or Advanced Search**.

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

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

Leads (Opportunity)

From the Opportunity, you can view lead details. The step-by-step instructions are included in the next section, [Viewing Leads \(Opportunity\)](#).

Creating a Lead (Opportunity)

Steps

Follow these steps to view leads:

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

1. Click the **Advanced Search** link.
The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Enter Search Name, if you want to save the search.
 4. Click **Search**.
1. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 1. Click the **Leads** link.
 2. Click the **Create** button.
The Create Lead page opens.
 3. Select a customer by typing the full or partial name using % as a wildcard.
 4. Select a location from the drop down list.
 5. Click **Go**.
 - If you do not find the customer for which you wish to create a lead, click **Create Customer**.
 1. From the search results page, click the customer's link.
Some customer information will populate the create lead page. Customer and Status fields are required fields.
The next items are optional and are in no specific order.
 - In the Purchase Items section, enter a Product Category and click **Go**.
 - Enter an Item ID, click **Go**.
 - Enter the unit of measure, quantity, and budget amount.
 - Enter a Campaign and click **Go**.
 2. Click Create.

Copying an Opportunity

Prerequisites

An opportunity must exist. See [Create an Opportunity](#).

Steps

Follow these steps to copy an existing opportunity:

1. You can access existing opportunities one of the following ways:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.

The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Click **Search**.
 4. Select an opportunity by clicking the opportunity link.
 - The Opportunity Detail Main page opens.
1. From the Opportunity Detail main page, click **Copy**.
- The Copy Opportunity page opens.
- Copy Opportunity will create a new opportunity from this opportunity. You can select which attributes you want to copy by following the next steps.
 1. If necessary, enter new customer and address information in place of the existing information.
 2. Select “Copy Attributes” by clicking the check box next to items such as; Purchase Items, Sales Team, Sales Credits, Competitors, Opportunity Contacts, Sales Methodology.
 3. It is important that you click the **Update** button before the next step.
 4. Click **Copy**.
- The opportunity contacts cannot be copied if the user changes the customer for the copied opportunity.

Creating a Quote from an Opportunity

Prerequisites

A quote must exist.

Steps

Follow these steps to create a quote from an opportunity:

1. From the **Opportunity** tab, select an opportunity using **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose **Opportunity** from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 2. Enter search filters and display options.
 3. Optionally, enter a Search Name, if you want to save the search.
 4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 5. Select the opportunity from the search results page by clicking the opportunity link.
 - The Opportunity Detail page opens.
 1. Click **Create Quote**.
 - The Create Quote page opens. The opportunity details are populated into the create quote page.
 1. Enter the quote name, a required field.
 2. Optionally, select a "Relate To" from the drop down list and enter the related entity.
 3. Enter an Invoice Address. To change the address, click **Change Address**.

4. Find a Customer Contact by entering the full or partial name and clicking **Go**.
5. Select a Channel from the drop down list.
6. Select an Expiration Date by clicking the Calendar icon and choosing a date.
7. In the Items section, Add an Item by entering the item name in the text box and clicking **Go**.
8. Select the item from the search results page.
9. To remove an item, select the Remove check box.
10. In the Notes section, enter a note by selecting the note type from the drop down list.
11. Enter the note text.
12. Click **Create**.

Adding Purchase Items (Opportunity)

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

Steps

Follow these steps to add a purchase item:

1. From the Opportunity tab, click the Opportunity subtab.
2. Select an Opportunity from the summary table or use the Quick Find feature to search for an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter a the full or partial name of the opportunity. If you enter a partial name, use the% key as a wild card.
 3. Click **Go**.
 4. Click **Add Purchase Items**.
 - The Opportunity Add Purchase Item page opens.
 1. Select the Product Category from the drop down list.

2. Select an Inventory Item by entering a partial name, use the “%” key as a wild card, and click **Go**.
3. Enter the Quantity and Unit of Measure (UOM).
4. Enter the Amount, it is a required field.
5. Select a Campaign by entering a partial name, use the “%” key as a wild card, and click **Go**.
6. Enter the number of Purchase lines that you want to split your purchase line.
7. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.
8. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.
9. Click **Add** to create multiple purchase lines with forecast dates in above mentioned intervals.
 - You will see the new purchase lines on the opportunity detail page.

Sales Credits (Opportunity)

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

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

- [Maintaining sales credits](#)
- [Adding a salesperson to receive sales credits](#)
- [Adding a partner to receive sales credits](#)

Maintaining Sales Credits (Opportunity)

Prerequisites

None

Steps

Follow these steps to split sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name using% as a wildcard.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Click **Search**.
 - The Opportunity Detail page opens.
 1. From the Purchase Items table, under the Amount column, click **Split**.
 2. Choose “[Add a Salesperson](#) or “[Add a Partner](#).
 3. Enter the credit amount or percentage.
 4. Click **Update**.

Adding a Salesperson to Receive Sales Credits (Opportunity)

Prerequisites

None

Steps

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

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. From the Purchase Items table, under the Amount column, click **Split**.
 5. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
 6. Select an employee by clicking the employee name link.
 - To search for an employee outside your business group, select the business group from the drop down list, click **Go**.
 7. Enter credit amount (forecast or other).

Adding a Partner to Receive Sales Credits (Opportunity)

Prerequisites

None

Steps

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

1. From the **Opportunity** tab, select the **Opportunity** subtab.
2. Select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Click **Search**.
 - The Opportunity Detail page opens.
 1. From the Purchase Items table, under the Amount column, click **Split**.
 2. In the Add a Partner field, enter the name of the partner, and click **Go**.
 3. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a "sales" partner.
 4. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop down list and click **Update**.
 - The salespeople and partners to whom you have given sales credits will automatically be added to the sales team with non-full access.

Adding an Existing Contact to an Opportunity

Prerequisites

A contact must exist. See [Creating a Contact](#).

Steps

Follow these steps to add an existing contact:

1. From the **Opportunity** tab, select an opportunity by clicking the link or search for an opportunity:

- To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
- The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Click **Search**.
 3. Select an opportunity by clicking the opportunity link.
- The Opportunity Detail page opens.
 4. Click the **Contacts** link.
 5. Enter the last name in the Add a Person field to search for a contact, click **Go**.

It is recommended that you search by last name only. This will search for people which have already established a relationship with this customer called contacts.
 6. From the Select a Person page, choose from the list of search results by clicking the relationship link.
- If you cannot find the person you are looking for, you can widen your search to look for all people checking the “Search All People” radio button.
- If you select a person that does not have an existing relationship with this customer, you can choose a relationship type.
- [Create a new contact](#)

Creating a New Contact (Opportunity)

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

Prerequisites

None

Steps

Follow these steps to create a new contact:

1. From the **Opportunity** tab, select an opportunity by clicking the link or search for an opportunity:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Select an opportunity by clicking the opportunity link.
 - The Opportunity Detail page opens.
 5. Click the **Contacts** link.
 6. In the Contacts table, enter new information into the blank fields.
 7. Click **Update** to save the information.

Note: Phone book and Email Addressbook are associated with the relationship, not the person.

Notes (Opportunity)

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

- [Create a note](#)
- [View a note](#)

Creating Notes (Opportunity)

Prerequisites

None

Steps

Follow these steps to create a note:

1. From the **Opportunity** tab, choose an opportunity by:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 - The **Opportunity Detail** page opens.
 1. Click the **Notes** link.
 2. Select a Type from the drop down list.
 - You can change the default type using Profiles.
 - Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
 1. Enter your notes in the Text box.
 2. Click **Create**.

Note: You cannot edit notes once they are created.

Viewing Notes (Opportunity)

Prerequisites

A note must exist. See [Creating a Note](#).

Steps

Follow these steps to view a note:

1. From the **Opportunity** tab, choose an opportunity by:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Select the opportunity by clicking the opportunity link.
 - The **Opportunity Detail** page opens.
 1. Click the **Notes** link.
 2. Select a Type from the drop down list.
 - The default type can be changed using Profiles.
 3. Choose the number of days for which you want the notes history.
 4. Click **Apply**.
 - 5. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
 - 6. To view all notes in a printer-friendly format, click **All Notes**.

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

Sales Teams (Opportunity)

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

- [Add a sales team member](#)
- [Add a partner](#)
- [Add a resource team to a sales team](#)
- [Remove a sales team member](#)

Adding a Sales Team Member (Opportunity)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Opportunity** tab, choose an opportunity by:
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 - 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.

2. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. Select the opportunity by clicking the opportunity link.
 - The **Opportunity Detail** page opens.
1. Click the **Sales Team** link.
2. Enter the last name or partial name of the sales representative in the “**Add a Salesperson**” field, click **Go**.
3. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.
4. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
5. Enter the territory properties, and click **Go**.
6. Select a Role from the drop down list.
7. You can view the email address and phone number for this salesperson.
8. Click **Update**.

Adding a Partner (Opportunity)

Prerequisites

None

Steps

If you want to add a partner to the sales team:

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

1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Optionally enter a Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The Opportunity Detail main page opens.
 1. Click the **Sales Team** link.
 2. Enter the partner name in the “Add a Partner” field, click **Go**.
 3. Select a partner from the search results page by clicking the link.
 4. Click **Update**.

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

Adding a Resource Team to a Sales Team (Opportunity)

Prerequisites

None

Steps

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

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

- The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Optionally enter a Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
- The Opportunity Detail page opens.
 1. Click the **Sales Team** link.
 2. In the Add a Resource field, enter the resource name or the wildcard and click **Go**.
 3. Select a resource from the search results page by clicking the link.
 4. Click **Update**.
- Each member of the resource team will be added to the sales team table.

Removing a Sales Team Member (Opportunity)

Prerequisites

None

Steps

Follow these steps to remove a sales team member:

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

2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
1. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 2. Click the **Sales Team** link.
 3. Locate the salesperson on the summary table and select the Remove check box.
 4. Click **Update**.

Tasks (Opportunity)

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

- [Create a task](#)
- [Add an attachment to a task](#)
- [Maintain a task](#)

Creating a Task (Opportunity)

Prerequisites

None

Steps

Follow these steps to create a task:

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

- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
- The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
- The **Opportunity Detail** page opens.
 1. Click the **Tasks** link.
 2. Click **Create**.
 3. Select **Task Type** from the drop down list.
 4. If the task is a private task, select the “**Private**” box. You can assign this task to yourself only.
 5. Enter the **Task Name**.
 6. Enter the **Task Description**.
 7. Choose the **Priority** from the drop down list.
 8. Select the **Status** from the drop down list.
 9. Select a planned start date by clicking the Calendar icon and selecting a date.
 10. Optionally, select a planned start time and end time by selecting from the drop down lists.
 11. Enter the name of the person you are assigning to the task; click **Go**.
 12. The “**Relate to**” field is defaulted to the opportunity with which you are working, however, you can edit this field.
 13. Click **Create**.
- When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

Adding an Attachment to a Task (Opportunity)

Prerequisites

A task must exist. See [Creating a Task](#).

Steps

Follow these steps to add an attachment to your task:

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

Maintaining a Task (Opportunity)

Prerequisites

A task must exist. See [Creating a Task](#).

Steps

Follow these steps to maintain a task:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose **Opportunity** from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.

1. Enter search filters and display options.
2. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
5. Click the Tasks link.
6. Add or update information.
7. Click **Update**.

Adding a Classification (Opportunity)

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

Prerequisites

None

Steps

Follow these steps to add a classification:

1. From the **Opportunity** tab, choose an opportunity.
 - To search using **Quick Find**:
 1. Choose Opportunity from the drop down list.
 2. Enter the full or partial name of the opportunity. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.

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

Adding an Existing Competitor (Opportunity)

You can add information about the competitors that you are facing with this opportunity. By definition, competitors are organizations that have a competitive relationship with an internal organization.

Please note, once you have selected the Competitor check box, the competitor is added to the competitor table. Even if you remove your selection of the check box, the competitor will remain in the competitor table.

Prerequisites

None

Steps

Follow these steps to add an existing competitor:

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

- The Opportunity Search page opens.
- 1. Enter search filters and display options.
- 2. Enter Search Name, if you want to save the search.
- 3. Click **Search**.
- 4. Click the opportunity link to select it.
- 5. The Opportunity Detail page opens.
- 6. Select the **Competitors** link.
- 7. Use Add a Competitor to search for a competitor, click **Go**.
- See the next section for steps about how to [create a new competitor](#).
- 8. Select from the list.
- 9. Optionally, enter comments.
- 10. Click **Update** to save.
- To remove a competitor, click the Remove icon, and click **Update**.

Creating a New Competitor (Opportunity)

Prerequisites

None

Steps

To create a new competitor, follow these steps:

1. From the Opportunity tab, create the internal organization, if one does not already exist.
 - Go to the Customers tab and create your company as an organization. Refer to the [Create a New Organization](#) section for step-by-step instructions. The required fields are Organization name and Address Line 1.
 - Note: Remember to select the **Internal** radio button, on the Opportunity Detail page, to indicate that it is an internal organization.
2. Next, create the competitor as an organization.
 - Go to the Customers tab and create an organization which will be the competitor.

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

Attachments (Opportunity)

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

- [Add an attachment](#)
- [View an existing attachment](#)

Adding an Attachment (Opportunity)

Prerequisites

None

Steps

Follow these steps to add an attachment:

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

3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Opportunity Search page opens.
 1. Enter search filters and display options.
 2. Enter Search Name, if you want to save the search.
 3. Click **Search**.
 4. Click the opportunity link to select it.
 - The **Opportunity Detail** page opens.
 1. Click the **Attachments** link.
 2. Click **Add**.
 - The **Add Attachment** page opens.
 3. Enter a description, and click **Text**, **File**, or **URL**.
 4. Enter Text, click Browse to search for the document, or enter the URL.
 5. Click **Create**.

Viewing an Existing Attachment (Opportunity)

To view an existing attachment, click the attachment link.

Opportunity Matching

There are several ways to generate a Partner list for Opportunity Matching. Use the appropriate general criteria selected at setup. Supplement those by manually creating and narrowing specific attributes and ranking them.

Oracle Partners Online's Partner matching engine will create a recommended Partner list for the specific opportunity. This list matches the details of the opportunity with the details on all of the Sales Partner's profiles. If a Partner matches more attributes than another Partner, it will automatically rank higher on the recommended Partner list.

Use this procedure to match an Opportunity to a Partner.

Prerequisites

Log in as Vendor or Partner User/Administrator and navigate to the following:

Opportunity > Opportunity Main Summary Subtab > Opportunity Details-Main Link > Channel Partners Link

Steps

1. Click opportunity with “unassigned status”.
2. Set the sales channel to ‘Indirect’.
3. Click ‘Match Partners’ using the recommended Partner Matching Engine.
4. View the recommended Partner list.
5. If you want to manually add Partners to this list, you can perform a manual search.
6. Access the Manual Matching page to search for specific attributes, for example, Vendor certification or Customer support capability. Enter your search criteria and click Search.
7. To add Partners to the matching list, from the search results, check off the desired Partners names and click Add to Partner Assignment List.
8. You can manually change any of the ranking associated with the Partners on the list.
9. When you have derived a satisfactory list, select the Partner assignment/routing method.
10. The routing method determines how the Opportunity is offered to Partners on the list:
 - **Single:** The Opportunity goes to the Partner ranked “1” only.
 - **Serial:** The Opportunity goes to the Partner ranked “1” first. If he/she rejects the opportunity, it goes to the next Partner on the list.
 - **Broadcast:** The Opportunity is offered to all Partners on a first come first server basis. Only one Partner can work on an opportunity at a time.
 - **Joint Selling:** The opportunity is offered to all Partners. Multiple Partners can accept the opportunity and work jointly on that opportunity.

Assign an Opportunity

Use this procedure to Assign an Opportunity.

Prerequisites

Log in as an Vendor User/Administrator and navigate to the following:

Opportunity > Opportunity Main Summary Subtab

Steps

1. Click an unassigned Opportunity.
2. See the steps for creating additional Opportunity detail.
3. When you have generated a list that satisfactorily matches Partners with Opportunities, select an assignment option.
4. Click Submit Assignment to start the Workflow routing and notifications to the Channel Managers of the Partners on the final Partner list.
 - While an Opportunity is being offered to Partners, the Vendor User can monitor the status of each Opportunity as involved parties (Vendor or Partner User) shepherd them toward closure.

Accepting/Declining an Offered Opportunity

Use this procedure to accept/decline an Offered Opportunity.

Prerequisites

Log in as Partner or VAD User/Administrator and navigate to the following:

**Opportunity >View By “Offered” in the Opportunity Summary Subtab
>Opportunity Detail- Main Link**

Steps

1. View specific details associated with your offered opportunity: business overview of Customer and Partner, project, total budget, win probability, vendor purchase items and amount, additional channel offering.
2. Click **Partner** link in the side menu
3. Click **Accept** or **Decline**.

- The page refreshes and becomes update able if the offered opportunity is accepted.

Updating an Active Opportunity

After a Partner accepts an offered Opportunity, the Opportunity page refreshes and allows the Partner to update the Opportunity.

Use this procedure to Update an Opportunity.

Prerequisites

Partner accepts an Opportunity. Log in as Partner or VAD User, navigate to the following and update information where appropriate.

Opportunity > Opportunity Summary Subtab > Update Opportunity Link

Steps

1. Fill in the project name.
2. Fill in the total budget.
3. Fill in Vendor purchase items or supply new amounts where appropriate.

Managing Addresses

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

- [Create a new address](#)
- [Edit address details](#)
- [View address history](#)

Creating a New Address

Prerequisites

None

Steps

Follow these steps to create a new address:

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

Editing Address Details

Prerequisites

An address must exist.

Steps

Follow these steps to edit address details:

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

Viewing Address History

Prerequisites

An address must exist.

Steps

Follow these steps to view address history:

1. Search for the opportunity, organization, or person for which you want to edit address details.
2. Click the opportunity, organization, or person's link.
3. Click the **History** button in the Addresses section.

4. Click **Back** to return to the previous page.

Opportunity Reports

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

- [View Opportunity Summary Report](#)
- [View Opportunity Summary Report by Group](#)
- [View Opportunity Detail Report](#)
- [View Opportunity Exchange Report](#)
- [View Opportunity Access Report](#)

To download any of the opportunity reports into a comma separated values file, click the **Download** button.

Viewing Opportunity Summary Report

This report provides a detailed list of opportunities with amounts for each product category.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Summary report:

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Summary Report** link.
4. Select the filter options.
5. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.
 - To move all available columns into the display columns section click the >> button.

6. In the Save Report As section, you can save the report under a different report name. Additionally, select the “Always run with current period” or “Always run with indicated period” radio buttons to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.

Viewing Opportunity Summary Report by Group

This report provides a summary of all opportunities by the sales group.

Prerequisites

None

Steps

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

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Summary Report by Group** link.
4. Select the filter options to fit your needs.
5. Select the display options.
6. In the Save Report As section, you can save the report under a different report name. Additionally, select the “Always run with current period” or “Always run with indicated period” radio buttons to indicate your preference.
7. To run the report without saving it, click **Run**.
8. To save the report without running it, click **Save**.
9. To run and save the report, click **Save and Run Report**.
 - To download the report, click the **Download** button.

Viewing Opportunity Detail Report

This report provides a detailed listing of the selected opportunities.

Prerequisites

None

Steps

Follow these steps to view the Opportunity Detail report:

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

Viewing Opportunity Exchange Report

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

Prerequisites

None

Steps

Follow these steps to view the Opportunity Exchange report:

1. Click the **Opportunity** tab.
2. Click the **Reports** subtab.
3. Click the **Opportunity Exchange Report** link.

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

Viewing Opportunity Access Report

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

Prerequisites

None

Steps

Follow these steps to view the Opportunity Access report:

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

9. To run and save the report at the same time, click **Save and Run Report**.
10. Select “Use as Report Default” check box to use the report as a default.

Viewing My Reports and Charts

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

You can view the following charts:

- [View Opportunity Chart by Close Date](#)
- [View Opportunity Chart by Status](#)
- [View Opportunity Chart by Win Probability](#)

Viewing Opportunity Chart by Close Date

Prerequisites

None

Steps

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

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

Viewing Opportunity Chart by Status

Prerequisites

None

Steps

To view opportunity chart by status, follow these steps:

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

Viewing Opportunity Chart by Win Probability

Prerequisites

None

Steps

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

1. From the **Opportunity** tab, click the **Reports** subtab.
2. In the Charts section, select the Opportunity Chart by Win Probability from the drop down list.
3. Select the chart style from the drop down list.
4. Select the chart dimension from the drop down list.
5. Select the period type from the drop down list.
6. Select the start and end periods from the drop down lists.

7. Select the chart number from the drop down list.
8. Click **Run** to see the chart.

Quotes Tab

The Quotes tab contains a Quotes and a Reports subtab.

From the Quotes subtab, you can do the following:

- [Search for quotes](#)
- Create a quote
- Maintain quote details
- Check availability
- Configure quote line items
- Select pricing agreements
- Apply manual price overrides
- Print a quote
- Place an order

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

Searching for a Quote

Follow these steps to search for a quote:

Steps

1. From the Quote tab you can use Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Quote from the drop down list.
 2. Enter the full or partial name of the quote. If you enter a partial name, use the % key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:

1. Click the **Advanced Search** link.
 - The Quote Search page opens.
1. Enter search filters and display options.
2. Enter Search Name, if you want to save the search.
3. Click **Search**.
4. Click the quote link to select it.
 - The **Quote Detail** page opens.

Forecast Tab

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

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

The following tasks can be performed from the Forecast subtabs:

- [Create and submit forecasts](#)
- [View forecast history](#)
- [Automatically submit worksheets](#)
- [Create attachments](#)
- [Create forecast notes](#)
- [View opportunity worksheets](#)
- [View product category worksheets](#)
- [Create opportunity level forecasts using opportunity worksheet](#)
- [Create product level forecasts using product category worksheet](#)
- [View product category forecast history](#)
- [View opportunity forecast history](#)
- [Generate forecasts](#)
- [Forecast reports](#)

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

Forecasting levels

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

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

Forecasting Views

| View | How it works |
|---|--|
| <p>Salesperson View (you are a salesperson; you do not manage other sales people)</p> | <p>Weighted Pipeline=Opportunity Amount multiplied by the Win Probability</p> <p>Pipeline=Total Forecastable Opportunity Amounts</p> <p>Won to Date=Sum of Opportunity Amount where the status equals won.</p> <p>Click the pipeline amount link to verify the opportunities included in your pipeline. This will show you a list of all forecastable opportunities with a close date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities.</p> <p>If you have submitted previous forecasts, the last submitted values will appear in the forecast values.</p> <p>The forecast main page will show your saved opportunity and product category worksheets (if any exist) as links. See the section on Creating Product Level Forecasts Using Product Category Worksheets and Creating Opportunity Level Forecasts Using Opportunity Worksheets for more information.</p> <p>Grand totals of last saved worksheet values appear along side the links.</p> <p>You can accept default values or update values the amounts you want to commit to, but you must submit your forecasts in order for your manager to be able to view them.</p> |

| View | How it works |
|--|--|
| <p>Manager View (you manage one or more groups; and the forecast you submit represents the group forecast)</p> | <p>Weighted Pipeline=Opportunity Amount multiplied by the Win Probability</p> <p>Pipeline=Total Forecastable Opportunity Amounts</p> <p>Won to Date=Sum of Opportunity Amount where the status equals won.</p> <p>The Manager View is located below the Salesperson View in the Forecast Summary page. Your subordinates (groups or individuals) forecasts are in the Subordinates section. You can view group details by clicking the group link; additionally, if you continue to drill down you will eventually reach the bottom of the sales hierarchy. You can view subordinate's forecast details by clicking the subordinate's name link.</p> <p>Forecasting is divided into several sections:</p> <p>Current Pipeline Values: if set to yes in your Forecasting profile preferences, will show you the dynamic amounts available in the subordinates current pipeline</p> <p>Submitted Pipeline Values: display the values of the pipeline at the time that the subordinate last submitted their forecasts</p> <p>Submitted Forecast Values: displays the forecast amounts that the salesperson or group has most recently committed to for the forecast period. If no forecasts have been submitted for the period, the Submitted Forecasts Values section will be blank.</p> <p>Submitted Date, Attachments, and Notes from the subordinates are displayed, if available</p> <p>When you forecast for the first time you will see current pipeline values. Pipeline values will reflect only opportunities that are forecastable and are set up by the system administrator. Additionally, the default forecast values are based on your Forecasting profile set up, under the Default New Rows in Worksheet where the options are zero and pipeline.</p> <p>To verify the opportunities included in a pipeline, click the Pipeline link. This displays a list of all forecastable opportunities with a close date that falls within the forecasting period. Additionally, the won amount link will show you a report of all won opportunities.</p> <p>If you have submitted previous forecasts, the last submitted values will appear in the forecast values.</p> <p>Grand totals of last saved worksheet values appear along side the links.</p> |

Note: Forecasting numbers are rounded down to the nearest whole dollar.

Creating and Submitting Forecasts

Prerequisites

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

Steps

Follow these steps to create and submit Forecasts:

1. From the **Forecast** tab, click the **Forecast** subtab.
2. Select the Sales Group for which you want to forecast, from the drop down list. If you work in multiple groups, you must submit multiple forecasts; one per group.
3. Select the **Period Type** and **Period Name** from the drop down lists.
4. Choose the **Forecast Category** from the drop down list.
 - The Forecast Category is a grouping of product categories for which you want to forecast.
5. Click **Apply**.

Note: Your forecast currency is displayed. To change the forecast currency, go to the Profiles icon, select the Forecasting link.
6. Update Worst Case, Forecast, and Best Case with the amounts that you want to submit to management and click the **Submit Forecast and Worksheets** button.

Automatically Submitting Worksheets

Sales Managers and Sales Representatives can automatically submit worksheets by setting the profile option “Auto Submit Forecast Worksheets” to None, Opportunity, Product Category, or Both. In accordance with your profile preferences for “Auto Submit Worksheets” and “Default Worksheets Values” you will submit worksheets according to preferences outlined in the table below. For instance, if you have saved a worksheet and you have turned on the Auto Submit feature then your saved worksheet will not be submitted, in place of your saved worksheet, Oracle Partners Online will submit a worksheet based on the “Default Worksheets Values” you have selected.

The option which is currently selected is displayed on the Forecast Main page.

Prerequisites

You must set profile preferences. See Setting Forecasting Preferences.

Steps

Follow these steps to set up automatic submission of worksheets:

1. From any page in Oracle Partners Online, click the **Profile** icon in the upper right of the page.
2. Under Oracle Partners Online Preferences, click the **Forecasting** link.
3. From the Auto submit Worksheet drop down list, select your preference.
4. Click **Update**.

The following table describes the Auto Submit Profiles.

Auto Submit Profiles

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

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

Viewing Forecast History

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

Prerequisite

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

Steps

Follow these steps to view forecast history:

1. From the **Forecast** tab, click the **Forecast History link**.
 - The **Forecast History** page opens.
2. You can click the Opportunity or Product Category Worksheet link to view either worksheet.

Adding an Attachment (Forecast)

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

Prerequisite

A forecast must already exist.

Steps

You can add an attachment to an existing forecast by following these steps:

1. From the **Forecast** tab, make sure you are on the Forecast subtab.
2. Select an existing forecast.
3. Click the Attachments link.
4. Click **Add**.
 - The Add Attachment page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.
 - Attachments are submitted to management along with your forecast numbers and can be viewed by your manager in the subordinate section of the main forecast page.

Adding a Note (Forecast)

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

Prerequisites

A forecast must already exist.

Steps

Follow these steps to add a note:

1. From the **Forecast** tab, click the **Notes** icon.
 - The Forecast-Notes page opens.
1. Select a Type from the drop down list.
 - You can change the default type by changing the forecast profile preferences.
1. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
2. Enter your notes in the text box.
3. Click **Create**

- Forecast Notes are submitted to management along with forecast numbers.

Note: You cannot edit notes once they are created.

Linking to Compensation

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

Steps

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

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

Opportunity Worksheet

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

- [Create Opportunity Level Forecast Using Opportunity Worksheet](#)

Creating Opportunity Level Forecasts Using Opportunity Worksheets

Prerequisites

None

Steps

Follow these steps to create opportunity worksheets:

1. From the **Forecast** tab, click the **Opportunity** subtab.
 - The **Opportunity Worksheet** page opens.
2. From the drop down list select the **Sales Group** for which you want to forecast.

3. Select the **Period Type** and **Period Name** from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. From the “**Create Worksheet Using**” radio buttons, select one of the following options:
 - **Previously Saved Values (default):** If you are forecasting for the first time, the value is based on the Oracle Partners Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.
 - **Pipeline Default Amounts:** This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.
 - If you have set up the Forecast profile, Default New Rows in Worksheet equal to Pipeline and status of opportunity equal to Won; then the Worst case, Forecast, and Best case amounts are all defaulted to the Opportunity amount.
 - Pipeline defaults use the following criteria:
 - **Worst Case:** Total Won Amount=Sum of all won opportunities
 - **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
 - **Best Case:** Total sum of all forecastable opportunities
 - **Subordinate Submitted Values:** This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.
 - Please note, only managers are allowed to create worksheets using subordinate submitted values.
6. Click **Apply**.
 - The page is refreshed with all the opportunities within your pipeline which are forecastable.
 - The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.
 - You can adjust the amounts in these fields to reflect your sales commitment.
7. Click **Save**.
 - The forecast will not be submitted by saving the worksheet, you must click the Submit Forecast and Worksheets button in the Forecast Main page.

Product Category Worksheet

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

- [Create Product Level Forecast Using Product Category Worksheet](#)

Creating Product Level Forecasts Using Product Category Worksheets

Prerequisites

None

Steps

Follow these steps to create product level forecasts using product category worksheets:

1. From the **Forecast** tab, click the **Product Category** subtab.
 - The **Product Category Worksheet** page opens.
2. From the drop down list select the **Sales Group** for which you want to forecast.
3. Select the **Period Type** and **Period Name** from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. From the **Create Worksheet Using** radio buttons, select one of the following options:
 - **Previously Saved Values (default):** If you are forecasting for the first time, the value is based on the Oracle Partners Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.
 - **Pipeline Default Amounts:** This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.
 - Pipeline defaults use the following criteria:
 - **Worst Case:** Total Won Amount=Sum of all won opportunities
 - **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
 - **Best Case:** Total sum of all open opportunities

- **Subordinate Submitted Values:** This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.
 - Please note, only managers are allowed to create worksheets using subordinate submitted values
6. Click **Apply**.
 - The page is refreshed with all the opportunities within your pipeline which are forecastable.
 - The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.
 - You can adjust the amounts in these fields to reflect your sales commitment.
 7. Click **Save**.
 - The forecast will not be submitted by saving the worksheet, you must click the Submit button.

Viewing Product Category History

Prerequisites

Previous product category forecasts must have been submitted.

Steps

You can view the Product Category Worksheet History by following these steps:

1. From the **Forecast tab**, click the **Product Category** subtab.
2. Click **Product Category Worksheet**.
3. Click the **History** button, to view the history of all previous forecast submissions for this product category.
 - Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted.

Viewing Opportunity History

Prerequisites

Previous opportunity forecasts must have been submitted.

Steps

You can view the Opportunity Worksheet History by following these steps:

1. From the **Forecast** tab, click the **Opportunity** subtab.
2. Click **Opportunity Worksheet**.
3. Click the **History** button, to view the history of all previous forecast submissions for this opportunity for all periods, groups, and roles, in descending submitted date.

Generate Forecast

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

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

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

Prerequisites

Set up profile OSO: Forecast Max Generate Months. See the *Oracle Partners Online Implementation Guide*, profiles chapter.

Steps

Follow these steps to generate a forecast:

1. From the Sales Group section, select a sales group from the drop down list.
2. From the Forecast section, select the Period Type from the drop down list.
3. Select the “From Period” and “To Period” from the drop down lists.
4. Select the Forecast Category from the drop down list.

5. Click **View**.
 - Displays the values that will be generated for your forecast.
6. Select all periods for which you want to generate forecasts by selecting the check box.
7. Click **Submit**.
8. Click the period's link to view the forecast.

Forecast Reports

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

- [View Forecast Summary by Product Category](#)
- [View Forecast Accuracy Report](#)
- [View Forecast Progression Report](#)
- [View Forecast Comparison Report](#)
- [View Forecast History Report](#)
- [View Forecast to Pipeline Summary Report](#)
- [View Forecast to Pipeline Trends Report](#)

Viewing Forecast Summary by Product Category

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

Prerequisites

None

Steps

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

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Summary Report by Product Category** link.
 - The Create Forecast Summary by Product Category Report page opens.
 - Under the Filters section you can select from any of the following filters.
 1. Select the Period Type from the drop down list.
 2. Select the Period for which you want to run the report.
 - The Credit Type is set to Forecast Credits.
3. Select a Business Line from the list of values.
4. Select a Status from the list of values.
5. Select a Channel from the list of values.
6. Enter an Opportunity Name.
7. Enter a Salesperson full or partial name and click **Go**.
8. Enter a Partner full or partial name and click **Go**.
9. Select the Product Category from the list of values.
10. Select a Sales Stage from the list of values.
11. Select a Win Probability from the drop down list.
12. Enter a project name.
 - Under the Display Options, you can select from the following choices:
 1. Select a Reporting Currency from the drop down list.
 2. Select a Product Category by selecting the radio button.
 3. Select a Threshold Amount.
 4. Select a Worksheet Type from the drop down list.
 5. Select the "Exclude deals where all forecast amounts are 0.00" if you want to exclude those items.
 - Add Displayed Columns from the Available Columns by using the > button. To remove Displayed Columns use the < button. If you want to add all the Available Columns to the Displayed Columns area use >> button.

7. Select your preference from the “Columns will be scaled as” drop down list.
8. Choose the Sort Rows by, Then by, Finally by options from each drop down list.
9. In the Save Report section, you can **Save the report**, **Save and Run the report**, or **Run the report** by clicking the respective button.

Viewing Forecast Accuracy Report

Prerequisites

None

Steps

Follow these steps to view the Forecast Accuracy report:

1. From the **Forecast** tab, click the **Reports** subtab.
2. Click the **Forecast Accuracy** report link.
3. Select your search filters.
4. Select your display options.
5. Click **Save**.
 - You can save the report by entering a report name and clicking the Save button.
6. Run the report by clicking **Run Report**.
7. To display the report on your home page, select the “Display on Homepage” check box.
8. To download the report, click **Download Report**.

Viewing Forecast Progression Report

Prerequisites

None

Steps

Follow these steps to view the Forecast Accuracy report:

1. From the **Forecast** tab, click the **Reports** subtab.

2. Click the **Forecast Progression** report link.
3. Select your search filters.
4. Select your display options.
5. Click **Save**.
 - You can save the report by entering a report name and clicking the Save button.
6. Run the report by clicking **Run Report**.
7. To display the report on your home page, select the “Display on Homepage” check box.
8. Click **Download Report**.

Viewing Forecast Comparison Report

This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet.

Prerequisites

None

Steps

Follow these steps to view the Forecast Comparison Report:

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

Viewing Forecast History Report

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

Prerequisites

None

Steps

Follow these steps to view the Forecast History Report:

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

Viewing Forecast to Pipeline Summary Report

Prerequisites

None

Steps

To view the Forecast to Pipeline Summary report, follow these steps.

1. From the **Forecast** tab, select the **Reports** subtab.
2. Click the **Forecast to Pipeline Summary** report link.
 - The Forecast to Pipeline Summary page opens.
3. Select filters and display options.
4. If you want to save the report, enter a report name.
5. Select “Always run using current period” or “Always run using indicated period” by selecting the radio button.
6. Select the “Display on Homepage” check box to display the report on your home page.
7. Click **Run Report**.
8. Click **Download Report**, to download the report to a spreadsheet application.

Viewing Forecast to Pipeline Trends Report

To view the Forecast to Pipeline Trends report, click the report link. You can download the report by clicking **Download Report**.

- [View Forecast History \(Subordinates\) Chart](#)

Creating a Report (Forecast)

Prerequisites

None

Steps

Follow these steps to create a forecast report:

1. From the **Forecast** tab, click the **Personalize** button.
2. Select search filters.
3. Select display options.
4. Select sort options.
5. Enter a report name.
6. Save and run the report.

Viewing Forecast History (Self) Chart

Prerequisites

A forecast history must exist.

Steps

To view forecast history (self) charts, follow these steps:

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

Viewing Forecast History (Subordinates) Chart

Prerequisites

A subordinates forecast history must exist.

Steps

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

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

Customer Tab

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

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

- [Personalize organization summary](#)
- [Create a new organization](#)
- [Maintain organization details](#)
- [Search for an organization](#)
- [Create and maintain relationships](#)
- [Maintain lead details](#)
- [Create and maintain opportunities](#)
- [Create and maintain notes](#)
- [Add and maintain sales team members](#)
- [Create and maintain tasks](#)
- [View interactions](#)
- [Create and maintain attachments](#)
- [Create and maintain accounts](#)
- [View 360 degree view of organization](#)
- [Maintain quote details](#)

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

- Personalize contacts
- Create contacts
- Search for contacts
- View contact details
- Maintain contact details
- Manage notes
- Manage tasks
- Manage attachments
- Manage interactions
- Send collateral to contacts

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

- Personalize person summary
- Create, maintain, search for people
- Send collateral
- Create and maintain relationships
- Maintain lead details
- Create and maintain opportunities
- Create and maintain notes
- Create and maintain sales teams
- Create and maintain tasks
- View interactions
- Create and maintain attachments
- Create and maintain accounts
- View 360 degree view of person
- Maintain quote details

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

Organization Summary

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

- [Personalizing Organization Summary](#)

Personalizing Organization Summary

Prerequisites

None

Steps

Follow these steps to personalize the organization summary page:

1. From the **Customer** tab, make sure you are on the **Organization** subtab.
2. Click **Personalize**.
3. Change, add, or remove parameters.
4. Change, add, or remove display options.
5. Change, add, or remove sort options.
6. Enter a Search Name.
7. Select the Use as Summary Page Default check box.
8. Click **Save**, or **Save and Apply Search**.
 - Saved Searches appear in a drop down list on the Organization page.

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

Creating a New Organization

Prerequisites

None

Steps

Follow these steps to create a new organization:

1. From the **Customer** tab, click the **Organization** subtab.
2. From the Organization Summary page, click **Create**.
3. Enter the required information and optional information. See the table below for detailed descriptions of each field.

The following table describes the Create Organization fields.

Create Organization Fields

| Field | Required Field | Description |
|---------------------------------|----------------|--|
| Organization | Yes | The organization name is a required field. |
| Organization Name Pronunciation | No | You can enter the organization name pronunciation. |
| Tax ID | No | Enter the tax identification code. |
| Email Addressbook | No | Enter the email address here or click the email address book to select another address. |
| Customer Category | No | Select customer category from the drop down list. |
| Annual Revenue | No | Select the currency from the drop down list. Enter the annual company revenue into the next field. |
| Fiscal Year End | No | Select the fiscal year end from the drop down list. |
| Web Site Address Book | No | Enter the organization's web site or click the web address book icon to select another party web address to display. |

| Field | Required Field | Description |
|-------------------|-----------------------|--|
| External/Internal | No | By default External is selected. Use Internal only if you are creating your organization. If you want to create relationships between your organization and other external organizations |
| Alias | No | Enter an organization alias. |
| Phonebook | No | Click the phonebook link to select another party phone number to display. |
| Business Line | No | Enter a business line, if applicable. |
| Total Employees | No | Enter the total number of employees. |
| Year Established | No | Enter the year the organization was established. |

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

Address Fields

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

| | | |
|----------|-----|---|
| Country | Yes | Select country from the drop down list. |
| End Date | No | Select an end date by clicking the calendar icon and choosing a date. |

If you want to enter person relationships, you can add an existing person by entering the last name in the Add a Person field and clicking **Go**. You can create a relationship with a person, who does not exist in the database yet, by entering the required information directly into the fields. When you click Update, the person is created in the database.

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

Person Relationship Fields

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

The following table describes Organization Relationship fields in Create Organization.

Organization Relationship Fields

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

4. After you have completed entering the information, scroll to the bottom of the page, click **Create**.
5. You have successfully created an organization when the Organization Detail Main page opens. The organization number is generated by the system.
 - [Link to Maintaining Organization Details](#)

Maintaining Organization Details

Prerequisites

An organization must exist. See [Creating an Organization](#).

Steps

Follow these steps to edit an existing organization:

1. From the **Customer** tab, click the **Organization** subtab.
2. Select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.

3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Organization Search page opens.
 1. Select search filters and display options.
 2. If you want to save the search, enter a Search Name.
 3. Click **Search**. If you want to apply the search and save the search at the same time, choose the **Save and Apply Search** button.
 4. To select an organization, click the organization's link.
 - The **Organization Detail** Main page opens.
 - 5. Add or update information.

The following table describes the Organization Detail fields.

Organization Detail Fields

| Field | Required Field | Description |
|---------------------------------|-----------------------|--|
| Organization | Yes | The organization name is a required field. |
| Organization Name Pronunciation | No | You can enter the organization name pronunciation. |
| SIC Code Version | No | Select the Standard Industry Code Version from the drop down list. |
| DUNS Number | No | Dunn and Bradstreet Number is pre-populated. |
| Tax Code/ID | No | Enter the tax code. |
| Email Addressbook | No | Enter the email address here or click the email address book to select another address. |
| Customer Category | No | Select customer category from the drop down list. |
| Annual Revenue | No | Select the currency from the drop down list. Enter the annual company revenue into the next field. |
| Fiscal Year End | No | Select the fiscal year end from the drop down list. |

| Field | Required Field | Description |
|------------------------|----------------|--|
| Last Order Date | No | View the last order date. |
| Web Site Address Book | No | Click the link to view the organization's web site. Click the icon to add or edit web site addresses. |
| External/Internal | No | By default External is selected. Use Internal only if you are creating your organization. If you want to create relationships between your organization and other external organizations |
| Number | No | View the number assigned to the organization. |
| Alias | No | Enter an organization alias. |
| SIC Code | No | Select an SIC code by entering a partial code and clicking Go . Select from the search results which are a subset of the SIC code version. |
| External System Number | No | Click the External System Number link to view details. |
| Phonebook | No | Click the phonebook link to select another party phone number to display. |
| Business Line | No | Enter a business line, if applicable. |
| Total Employees | No | Enter the total number of employees. |
| Year Established | No | Enter the year the organization was established. |
| Lifetime Value | No | View the lifetime value. |
| Status | No | Select a status from the drop down list. |

6. In the Addresses section you can edit information such as:
- Identifying Address: Main address used to identify the organization
 - Address History: Address history of the organization
 - Map It: Map the address by clicking the icon
 - Phone book: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
 - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar

- End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
- Status: Displays the status indicated in the details
- Type: Displays the address type indicated in the details
- Primary: Used to indicate primary address type across physical addresses

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

To create an address, click **Create Address** and follow these steps:

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

Searching for an Organization

Prerequisites

An organization must exist. See [Creating an Organization](#).

Steps

Follow these steps to search for an organization:

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

Creating and Maintaining Relationships (Organization)

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

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

- [Create an Organization to Organization Relationship](#)
- [Create an Organization to Person Relationship](#)

Creating an Organization to Organization Relationship

Prerequisites

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

Steps

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

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table, using Quick Find or Advanced Search.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 - The Organization Search page opens.
 2. Select search filters and display options.
 3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 4. Click the organization link to select it.
 - The Organization Detail Main page opens once you have selected an organization.
 5. Click the **Relationships** link.
 6. In the **Add an Organization** field, enter the name, or partial name.
 7. Click **Go**.
 - The search results page opens with the name and all addresses of the organization. Addresses are read-only.

8. From the Search Results page, click the organization link to select the organization for which you want to create a relationship.
 - The Organization Detail Main page opens and the Related Organization field, a required field, is populated.
9. Choose a **Relationship Type** from the drop down list.
10. Optionally, enter a start and/or end date. If a start date is not entered, the field will default to the current date when you click **Update**.
11. Click **Update**.
12. After saving the relationship, the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. Additionally, the Related Organization will become a link and you can view the related organization's detail by clicking to select it.
13. From the Organization to Organization Relationship Detail page you can change the relationship type, start and end dates, select relationship addresses and designate an identifying related address, add Notes, Tasks, Interactions, and Attachments.

Creating an Organization to Person Relationship

Prerequisites

The Organization should exist.

Steps

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

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

1. Click the **Advanced Search** link.
 - The Organization Search page opens.
 1. Select search filters and display options.
 2. If you want to save the search, enter a Search Name.
 3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 4. Click the organization link to select it.
 - The Organization Detail Main page opens once you have selected an organization.
 5. Click the **Relationships** link.
 6. In the **Add a Person** field, enter the name, or partial name.
 7. Click **Go**.
 8. Choose from the list of people or, if you do not find the person for which you are looking, [Create a Customer](#).
 9. Choose a **Relationship Type** from the drop down list.
 10. Optionally, you can enter phone number, email address, job titles, or send collateral.
 11. Click **Update**.
 12. After saving the relationship the Relationship field in the table will become a link and you can view the Relationship Detail page by clicking the link. From the Relationship Detail page you can change the relationship type, start and end dates, addresses, and add other details such as mail stop, roles, manager information, and job title. Additionally, you can add Notes, Tasks, Interactions, and Attachments to the relationship detail.

Creating a Customer

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

Steps

Follow these steps to create a new customer:

1. From the Relationships detail page, click **Create Customer**.

2. Enter the required information.
3. Click **Create**.
 - Continue creating a relationship after you have created the new customer.

Maintaining Lead Details (Organization)

Steps

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

1. Search for an organization from which you want to edit lead details.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The Organization Detail Main page opens.
 7. Click the **Leads** link.
 - The Leads summary page opens.
 8. Select a lead by clicking the lead link
 - The Lead Detail page opens.
 - The following table describes the fields you can edit in the Lead Detail page.

Lead Detail Fields

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

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

Purchase Items-Lead Detail Fields

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

9. Click **Update**.

Creating and Maintaining Opportunities (Organization)

You can create and maintain opportunities, in the context of a specific organization, by using the following steps.

Prerequisites

The organization must exist.

Steps

Follow these steps to create a new opportunity:

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

1. Click the **Advanced Search** link.
2. The Organization Search page opens.
3. Select search filters and display options.
4. If you want to save the search, enter a Search Name,.
5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
6. Click the organization link to select it.
 - The Organization Detail Main page opens.
7. Click the **Opportunities** link.
 - You will see a summary of all opportunities for the specific organization.
8. From the summary table, you select the columns that you want to display by clicking the **Personalize** icon located next to the Create button.
 - You can choose to view information such as Sales Stage, Win Probability, Status, Close Date, and Amount by changing the Display Options on the Opportunity Table Personalization page.
9. **Click Create to create a new opportunity.**
 - The organization name will default to the name of the organization that you have created or the organization for which you are viewing the details.
10. Enter the customer address and opportunity name. Additionally, enter any other information.
11. Click **Create**.
 - The Opportunity Detail page opens.
12. Optionally, enter additional information on the Opportunity Detail page or click the link to return to the organization detail.
 - The opportunity that you have created will appear in the opportunity summary table.

Notes (Organization)

In order to better support and service your customers, you can enter comments into a free form text field that you can archive and share with others in your

organization. The Notes tab represents a log of information that is stored about a particular organization.

- [Create a note](#)
- [View a note](#)

Creating a Note (Organization)

Prerequisites

The organization must exist.

Steps

Follow these steps to create a note:

1. From the **Customer** tab, choose an organization.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search, enter a Search Name,.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The **Organization Detail** Main page opens.
 7. Click the **Notes** link.
 8. Select a Type from the drop down list.
 - You can change the default type using Profiles.

9. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
10. Enter your notes in the text box.
11. Click **Create**.

Note: You cannot edit notes once they are created.

Viewing a Note (Organization)

Prerequisites

The note must exist.

Steps

Follow these steps to view a note:

1. From the **Customer** tab, choose an organization.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search, enter a Search Name,.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The **Organization Detail** Main page opens.
 7. Click the **Notes** link.
 8. Select a Type from the drop down list.
 - The default type can be changed using Profiles.

9. Choose the number of days for which you want the notes history.
10. Click **Apply**.
11. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
12. To view “All Notes” in a printable version, click the All Notes button.

Note: Your profile set up determines the number of rows that will display in your notes table.

- If there are more records than you have chosen to display, click Next at the bottom of the table to view more records.

Sales Teams (Organization)

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

- [Add a sales team member](#)
- [Add a partner](#)
- [Add a resource team](#)
- [Remove a sales team member](#)

Adding a Sales Team Member (Organization)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.

2. Enter the partial name of the organization for which you are searching.
3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The Organization Detail Main page opens.
 7. Click the **Sales Team** link.
 8. Enter the last name or partial name of the sales representative in the Add a Salesperson field.
 9. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.
 10. Choose from the company menu, click **Go**.
 11. Click the salesperson link.
 12. Click **Update**.
 - If you want to associate this salesperson with a customer location for the purposes of territory assignment:
 1. Enter the location or partial location.
 2. Click **Go**.

Adding a Partner (Organization)

Prerequisites

None

Steps

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

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The Organization Detail Main page opens.
 7. Click the **Sales Team** link.
 8. Enter the partner name in the “Add a Partner” field, click **Go**.
 - It is recommended that you search by last name only.
 9. Select a partner from the search results list.
 10. Click **Update**.

You can choose only from a list of partners whose organizations are specifically defined as a “sales” partner.

Adding a Resource Team (Organization)

Prerequisites

None

Steps

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

1. From the Customer tab, select an organization by:
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the full or partial name of the organization. If you enter a partial name, use the% key as a wild card.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Enter search filters and display options.
 4. Optionally enter a Search Name, if you want to save the search.
 5. Click **Search**.
 6. Click the organization link to select it.
 - The Organization Detail page opens.
 7. Click the **Sales Team** link.
 8. In the Add a Resource field, enter the resource name or the wildcard and click **Go**.
 9. Select a resource from the search results page by clicking the link.
 10. Click **Update**.
 - Each member of the resource team will be added to the sales team table.

Removing a Sales Team Member (Organization)

Prerequisites

The sales team member must be on the sales team.

Steps

Follow these steps to remove a sales team member:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The Organization Detail Main page opens.
 7. Click the **Sales Team** link.
 8. Locate the salesperson that you want to remove on the summary table.
 9. Select the Remove check box.
 10. Click **Update**.

Tasks (Organization)

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

- [Create a task](#)
- [Add an attachment to a task](#)

Creating a Task (Organization)

Prerequisites

None

Steps

Follow these steps to create a task:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The Organization Detail Main page opens.
 7. Click the **Sales Team** link.
 8. Click the **Tasks** link.
 9. Click **Create**.
 - The Create Task page opens.
 - 10. Select Task Type from the drop down list.
 - If the task is a private task, select the **Private** box. This task can only be assigned to you.

11. Enter the Task Name.
12. Enter the Task Description.
13. Choose the **Priority** from the drop down list.
14. Select the **Status** from the drop down list.
15. Select a planned start date by clicking the calendar icon and selecting a date.
16. Optionally, select a planned start time and end time by selecting from the drop down lists.
17. Enter the name of the task owner, click **Go**.
18. Select a task owner by clicking the link from the list of search results.
19. Optionally, you can relate the task to an opportunity, organization, person or relationship, click **Go**.
 - The default, since you are creating the task in the context of an organization, is related to that organization.
20. Click **Create**.
 - When the Task Detail page opens, you have successfully created a task. You can change information or add an attachment from this page.

Adding an Attachment to a Task (Organization)

Prerequisites

The task must exist. See Creating a Task.

Steps

Follow these steps to add an attachment:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find** or **Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.

- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
- The Organization Detail Main page opens.
 7. Click the **Attachments** link.
 8. Click the **Add** button.
- The **Add Attachment** page opens.
 9. Enter a description, click **Text**, **File**, or **URL**.
 10. Enter Text, click Browse to search for the document, or enter the URL.
 11. Click **Create** or **Clear**.

Interactions (Organization)

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

- [View interactions](#)

Viewing Interactions (Organization)

Prerequisites

The interaction must exist.

Steps

Follow these steps to view interactions:

1. From the **Customer** tab, choose an organization.

2. Select **Quick Find** or **Advanced Search**.

- To search using **Quick Find**:

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

- To search using **Advanced Search**:

1. Click the **Advanced Search** link.
2. The Organization Search page opens.
3. Select search filters and display options.
4. If you want to save the search enter a Search Name.
5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
6. Click the organization link to select it.
 - The Organization Detail Main page opens.
7. Click the **Interactions** link.
8. Select search filters.
9. Click **Apply**.

Note: Oracle Partners Online users cannot create interactions.

Attachments (Organization)

Attachments are defined as physical documents, URLs, or text. The typical use of attachments is for sharing and storing information about an organization. For example, you can attach a press release about the organization.

- [Add an attachment](#)
- [View an existing attachment](#)

Adding an Attachment (Organization)

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. From the **Customer** tab, choose an organization.
2. Select **Quick Find or Advanced Search**.
 - To search using **Quick Find**:
 1. Choose Organization from the drop down list.
 2. Enter the partial name of the organization for which you are searching.
 3. Click **Go**.
 - To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization link to select it.
 - The Organization Detail Main page opens.
 7. Click the **Attachments** link.
 8. Click **Add**.
 - The **Add Attachment** page opens.
 9. Enter a description, click **Text, File, or URL**.
 10. Enter Text, click Browse to search for the document, or enter the URL.
 11. Click **Create**.

Viewing an Existing Attachment (Organization)

To view an existing attachment, click the attachment link.

- [Adding an attachment](#)

360 Degree View (Organization)

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

- [View 360 degree view](#)

Viewing 360 Degree View (Organization or Person)

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

Prerequisites

None

Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, choose an organization or person.
 - The **Organization or Person Detail Main** page opens.
2. Click the **360 View** link.
 - A new Organization or Person Detail page, specific to the 360 Degree View, opens.
3. You can view summary pages for each of the following by clicking each link:
 - Orders
 - Invoices

- Returns
 - Products
 - Service Requests
 - Quotes
4. Click the link to view the details of any item.

Accounts

You can manage accounts for organizations and people from the Customer tab. Click a link below to find step-by-step instructions to manage accounts.

- [Create an account](#)
- [Maintain account details](#)
- [View account sites](#)
- [View account roles](#)
- [View account relationships](#)

Creating Accounts (Organization or Person)

Prerequisites

None

Steps

Follow these steps to create an account:

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

- To search using **Advanced Search**:
 1. Click the **Advanced Search** link.
 2. The Organization or Person Search page opens.
 3. Select search filters and display options.
 4. If you want to save the search enter a Search Name.
 5. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
 6. Click the organization or person link to select it.
- The Organization or Person Detail Main page opens.
- 7. Click the Accounts link.
- The Account Summary page opens with all accounts that exist for the Organization or Person.
- 8. Click **Create**.
- The Create Account page opens.

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

Create Account Detail Fields

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

9. Click **Create**.

Maintaining Account Details (Organization or Person)

Prerequisites

An account for an organization or person must exist.

Steps

Follow these steps to view an account:

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

2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

- Choose Organization or Person from the drop down list.
- Enter the partial name of the organization or person for which you are searching.
- Click **Go**.

To search using **Advanced Search**:

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

3. Click the organization or person link to select it.

The Organization or Person Detail Main page opens.

4. Click the Accounts link.

5. Select an account from the summary table by clicking the account's link.

The Account Detail page opens.

Account Detail Fields

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

6. Edit information.
7. Click **Update**.

Viewing Account Sites (Organization or Person)

Prerequisites

An account site for an organization or person must exist.

Steps

Follow these steps to view an account site:

1. From the **Customer** tab, choose an organization or person.
2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

- Choose Organization or Person from the drop down list.
- Enter the partial name of the organization or person for which you are searching.
- Click **Go**.

To search using **Advanced Search**:

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

3. Click the organization or person link to select it.

The Organization or Person Detail Main page opens.

4. Click the Accounts link.

5. Select an account from the summary table by clicking the account's link.

The Account Detail page opens.

6. Click the Sites link.

- To add a site, click the **Add Site** button.
- Select an address that already exists
 - Change the site use by selecting from the drop down list
 - Select the Primary check box, if applicable
 - Change the site Status by selecting from the drop down list
- To view site details, click the site Address link.
- To view site history, click the History button.
- To map the site address, click the Map It icon.

Viewing Account Roles (Organization or Person)

Prerequisites

An account role for an organization or person must exist.

Steps

Follow these steps to view an account role:

1. From the **Customer** tab, choose an organization or person.
2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

- Choose Organization or Person from the drop down list.
- Enter the partial name of the organization or person for which you are searching.
- Click **Go**.

To search using **Advanced Search**:

- Click the **Advanced Search** link.
 - The Organization or Person Search page opens.
 - Select search filters and display options.
 - If you want to save the search enter a Search Name.
 - Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Click the organization or person link to select it.
The Organization or Person Detail Main page opens.
 4. Click the Accounts link.
 5. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
 6. Click the Roles link.
 - To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using % as a wildcard. Click **Go**.
 - To remove a role, locate the related account and click the Erase icon.

- To change the role type, select from the drop down list.
 - To indicate a primary role, select the Primary Role radio button.
 - To change the status, select from the drop down list.
 - To find an address, enter the full or partial address using % as a wildcard. Click **Go**.
 - Select an effective date by clicking the calendar icon and choosing a date.
 - Select an end date by clicking the calendar icon and choosing a date.
7. Click **Update**.

Viewing Account Relationships (Organization or Person)

Prerequisites

An account relationship for an organization or person must exist.

Steps

Follow these steps to view an account relationship:

1. From the **Customer** tab, choose an organization or person.
2. Select **Quick Find** or **Advanced Search**.

To search using **Quick Find**:

- Choose Organization or Person from the drop down list.
- Enter the partial name of the organization or person for which you are searching.
- Click **Go**.

To search using **Advanced Search**:

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

3. Click the organization or person link to select it.
The Organization or Person Detail Main page opens.
4. Click the Accounts link.
5. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
6. Click the Relationships link.
 - To remove a relationship, locate the related account and click the Erase icon.
 - To find a related account number, enter the account number and click **Go**.
 - The related account name will populate the field.
 - To change the relationship type, select from the drop down list.
 - To change the status, select from the drop down list.
 - To indicate a reciprocal relationship, select the Reciprocal check box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
7. Click **Update**.

Maintaining Quote Details

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

Prerequisites

A quote must exist.

Steps

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

- Click the **Advanced Search** link.
 - The Organization or Person Search page opens.
 - Select search filters and display options.
 - If you want to save the search enter a Search Name.
 - Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
2. Click the organization or person link to select it.
The Organization or Person Detail Main page opens.
 3. Click the Quotes link.
The Quote Detail page opens.
 4. Update quote information.
 5. Click **Update** to save changes.

Contacts Subtab

Within the Customer tab you will find the Contact subtab. From this page, you can easily access organization to person relationships, also referred to as business contacts. You can do the following from the Contact subtab:

- [Personalize contact summary](#)
- [Create contacts](#)
- [Search for contacts](#)
- [View contact details](#)
- [Maintain contact details](#)
- [Manage notes](#)
- [Manage tasks](#)
- [Manage attachments](#)
- [Manage interactions](#)
- [Send collateral to contacts](#)

Personalize Contact Summary

Prerequisites

None

Steps

Follow these steps to personalize contacts:

1. From the **Customer** tab, click the **Contact** subtab.
2. Click the **Personalize** button.
3. Enter search filters in the Person, Address, Sales Team, Relationship sections, if desired.
4. Select display options and sort options.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search**.

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

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

Creating a Contact

Prerequisites

None

Steps

Follow these steps to create a contact:

1. From the **Customer** tab, click the **Contact** subtab.
2. Click **Create**.

The Create Contact page opens.

You can create Person to Organization or Person to Person relationships in the Create Contact page, the first step is to either select an existing person or create a new person.

3. To select an existing person, enter the full or partial name in the “Select a Person” field and click **Go**. From the search results page click the person’s link to select it. Your selection will populate the person field as read-only on the create contact page.
4. To create a new person, click **Create Person**. The person you create will be added to the database.
5. Select a person or organization for which the person is a contact. To select a person or organization, enter the full or partial name of the person or organization (the default is organization). If you want to add a person to the relationship, click **Go** without entering any search filters and select the Persons radio button. From the search results page click the person or organization’s link to select it. Your selection will populate the customer field on the Create Contact page as read-only. Here, you can also select an address to associate with the person or organization. If you select the address of the person or organization, the address will populate the address field on the Create Contact page.
6. Enter the contact information directly onto the Create Contact page. The following steps take you through the fields:
 - Person, Customer, and Relationship Type are the required fields.
 - Optionally, enter information for Address fields. This field may be populated if you selected an address while selecting a person or organization for the relationship. You may want to change the address to the address of the person, the address of the related person, or the address of the related organization in the relationship; to change the address enter the full or partial address and click the Change Address button.
 - The address may be the address of the contact, the related person, or the related organization depending upon your previous selection of customer.
 - In the Relationship Information section:
 - Select a start date by clicking the calendar icon and choosing a date.
 - Select a phone number to use from the Phone Book by clicking the phone book icon.
 - Select a status from the drop down list of values.
 - In the Business Information section,
 - Enter department information.
 - Enter job title.

- Enter mail stop information.
 - Select Decision Maker, if applicable.
 - Select Reference, if applicable.
 - Select a Role, or Roles, and designate a primary in the Roles table.
7. Click **Create**.

Searching for a Contact

Steps

Follow these steps to search for a contact:

1. From the **Customer** tab, click the **Contact** subtab.
You can search for a contact using Quick Find or Advanced Search.
2. To search using Quick Find:
 - Choose Contacts from the drop down list.
 - Enter the contact's full or partial name.
 - Click **Go**.
3. To search using Advanced Search:
 - Click the **Advanced Search** link.
 - The Contact Search page opens.
 - Enter search filter information and display options.
 - Click **Search**.
4. To select the contact, click the contact link.

Maintaining Contact Details

Prerequisites

A contact must exist.

Steps

Follow these steps to maintain contact details:

1. From the **Customer** tab, click the **Contact** subtab.
You can search for a contact using Quick Find or Advanced Search.
2. To search using Quick Find:
 - Choose Contacts from the drop down list.
 - Enter the contact’s full or partial name.
 - Click **Go**.
3. To search using Advanced Search:
 - Click the **Advanced Search** link.
 - The Contact Search page opens.
 - Enter search filter information and display options.
 - Click **Search**.
4. To select the relationship details, click the relationship link.
5. Edit or update information.
6. Click **Update**.

Follow these steps to view details from the contact summary table:

1. View person details by clicking the person link.
2. View person to organization or person to person relationship details by clicking the relationship link.
Please note, the screen will display differently depending on which type of relationship you select.
3. View party details by clicking the party link.
4. View the identifying relationship address on the summary table.
5. View the email address on the summary table. To edit the email address, click the email address book icon.

Managing Relationship Notes

Prerequisites

None

Steps

To create a relationship note:

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.

To search using Quick Find:

- Choose Contacts from the drop down list.
- Enter the contact's full or partial name.
- Click **Go**.

To search using Advanced Search:

- Click the **Advanced Search** link.
- The Contact Search page opens.
- Enter search filter information and display options.
- Click **Search**.

2. From the search results page, click the relationship link.
3. Click the **Notes** link.
4. Select a Type from the drop down list.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.

Note: You cannot edit notes once they are created.

To search for a relationship:

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.

2. To search using Quick Find:
 - Choose Contacts from the drop down list.
 - Enter the contact's full or partial name.
 - Click **Go**.

3. To search using Advanced Search:
 - Click the **Advanced Search** link.
 - The Contact Search page opens.
 - Enter search filter information and display options.
 - Click **Search**.

Managing Relationship Tasks

Prerequisites

None

Steps

To create a relationship task:

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.

To search using Quick Find:

- Choose Contacts from the drop down list.
- Enter the contact's full or partial name.
- Click **Go**.

To search using Advanced Search:

- Click the **Advanced Search** link.
- The Contact Search page opens.
- Enter search filter information and display options.
- Click **Search**.

2. From the search results, click the relationship link.
3. Click the **Tasks** link.
4. Click **Create**.

The Create Task page opens.
5. Select Task Type from the drop down list.

If the task is a private task, select the **Private** check box.

6. Enter the Task Name.
7. Enter the Task Description.
8. Choose the **Priority** from the drop down list.
9. Select the **Status** from the drop down list.
10. Select a planned start date by clicking the calendar icon and selecting a date.
11. Optionally, select a planned start time and end time by selecting from the drop down lists.
12. Enter the name of the task owner, click **Go**.
13. Select a task owner by clicking the link from the list of search results.
14. Click **Create**.

To search for a relationship task:

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.

2. To search using Quick Find:
 - Choose Contacts from the drop down list.
 - Enter the contact's full or partial name.
 - Click **Go**.
3. To search using Advanced Search:
 - Click the **Advanced Search** link.
 - The Contact Search page opens.
 - Enter search filter information and display options.
 - Click **Search**.
 - Click the relationship link.
 - Click the **Tasks** link.

Managing Relationship Attachments

Prerequisites

None

Steps

To create a relationship attachment:

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.

To search using Quick Find:

- Choose Contacts from the drop down list.
- Enter the contact's full or partial name.
- Click **Go**.

To search using Advanced Search:

- Click the **Advanced Search** link.
- The Contact Search page opens.
- Enter search filter information and display options.
- Click **Search**.

2. From the search results, click the relationship link.

3. Click the **Attachments** link.

4. Click **Add**.

The **Add Attachment** page opens.

5. Enter a description, click **Text**, **File**, or **URL**.

6. Enter Text, click Browse to search for the document, or enter the URL.

7. Click **Create**.

Searching for a Relationship Attachment:

Steps

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.

2. To search using Quick Find:
 - Choose Contacts from the drop down list.
 - Enter the contact's full or partial name.
 - Click **Go**.
3. To search using Advanced Search:
 - Click the **Advanced Search** link.
 - The Contact Search page opens.
 - Enter search filter information and display options.
 - Click **Search**.
4. To select the relationship details, click the relationship link.

Managing Relationship Interactions

Prerequisites

None

Steps

To view a relationship interaction:

1. From the **Customer** tab, click the **Contact** subtab.

You can search for a contact using Quick Find or Advanced Search.
2. To search using Quick Find:
 - Choose Contacts from the drop down list.
 - Enter the contact's full or partial name.
 - Click **Go**.
3. To search using Advanced Search:
 - Click the **Advanced Search** link.
 - The Contact Search page opens.
 - Enter search filter information and display options.

- Click **Search**.
- 4. To select the relationship details, click the relationship link.
- 5. Click the **Interactions** link.
- 6. Click a link to view details.

Sending Collateral from the Contact Summary Table

Steps

Follow these steps to send collateral:

1. Select the contact's **Collateral Recipient** check box to send collateral to the contact or use the **Select All** button to send collateral to all contacts on the summary table.
2. Click **Send Collateral**.
3. You will be prompted to complete the fulfillment request. Please refer to the [Fulfillment tab](#) for further instructions.

Person Subtab

The following tasks can be performed from the **Customer** tab, **Person** subtab:

- [Personalize person summary](#)
- [Create people](#)
- [Maintain people details](#)
- [Search for people](#)
- [Send collateral](#)
- [Create and maintain relationships](#)
- [Create and maintain leads](#)
- [Create and maintain opportunities](#)
- [Create and maintain notes](#)
- [Create and maintain sales teams](#)
- [Create and maintain tasks](#)

- [View interactions](#)
- [Create and maintain attachments](#)
- [Create and maintain accounts](#)
- [360 degree view](#)
- [Maintain quote details](#)
- [View customer reports](#)

Person Summary

Within the Customer tab you will find the Person subtab. From this page, you can maintain information displayed in the summary table, change your summary view, or send collateral.

- [Personalizing Person Summary](#)

Personalizing Person Summary

You can use the Personalize button to define your own personal list of People. The default view is “My People” where you will see details for those people with which you belong to the sales team.

Steps

Follow these steps to personalize the person summary:

1. From the **Customer** tab, choose the **Person** subtab.
2. Click **Personalize**.
3. Either choose an existing search by selecting it from the drop down list and click **Go** OR enter search criteria in Person, Address, Sales Team, Relationship sections, if desired to view consumers.
4. Choose display options.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search**. **If you want to search without saving the search, click Search.**

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

Updating Person Summary Table

Depending on the fields you have selected to display on your summary table, some fields are updatable.

Steps

Follow these steps to update a summary table:

1. From the **Customer** tab, click the **Person** subtab.
2. To edit the phone number, select the phone book icon and select a phone number.
3. To edit the email address, select the email address book icon and select another email address.
4. To indicate that this person should no receive mail, select the Do Not Mail check box.
5. If you want this person to receive collateral, select the Collateral Recipient check box.
6. Click **Update**.

Creating a Person

Steps

Follow these steps to create a person from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.
2. Click **Create**.

The Create Person page opens.

The following table describes the fields in the create person section.

Create Person Detail Fields

| Field | Required Field | Description |
|-------------|----------------|------------------------|
| Last Name | Yes | Enter the last name. |
| First Name | Yes | Enter the first name. |
| Middle Name | No | Enter the middle name. |

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

3. In the Business Information section, you can enter information such as:

Business Information Fields

| Field | Required Field | Description |
|---------------------|----------------|--|
| Relationship | No | Select a relationship from the drop down list. |
| Organization | Yes | Select an organization to form the business relationship with. |
| Address | No | Enter a business address. |
| Manager | No | Find the manager by entering the full or partial name and clicking Go . |
| Mail Stop | No | |
| Department | No | Enter the department, if applicable. |
| Job Title | No | Enter a job title. |
| Job Title Type | No | |
| Role | No | Select a role from the drop down list. |
| Business Phone Book | No | Select a phone number from the party list by clicking the phonebook icon. |
| Start Date | No | Select a date by clicking the calendar icon. |

| Field | Required Field | Description |
|----------------|----------------|--|
| Decision Maker | No | Select the check box to indicate that the person is a decision maker. |
| Reference | No | Select the check box to indicate the person can be considered a reference. |
| Do Not Mail | No | Select the check box to indicate that no mail is to be sent. |

4. In the Personal Information section, you can enter information such as:
 - Personal Phone Book: Select a phone number by clicking the phone book icon
 - Address Type: Select from the list of values
 - Address Lines 1-4: Enter information into the address fields
 - County: Enter information into the field
 - Start Date: Select by clicking the calendar icon and choosing a date
 - Do Not Mail: Select the check box to indicate “do not mail”
5. In the Notes sections, you can enter notes associated with this person.
 - Select the note type from the drop down list.
 - Enter text in the Text box.
 - Click Create.

You have successfully created a person when the Person Detail Main page opens.

Maintaining Person Details

Steps

Follow these steps to maintain person details from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.
To maintain an existing person, search for the person by:
2. Select **Quick Find or Advanced Search**.

To search using the **Quick Find** function:

- Choose People from the drop down list.
- Enter the person’s full or partial name.
- Click **Go**.

To search using the **Advanced Search** function:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person from the Search Results page by clicking the person’s link.

The **Person Detail** page opens.

The following table describes the Person Details fields.

Person Detail Fields

| Field | Required Field | Description |
|--------------------------|-----------------------|--|
| Last Name | Yes | Enter the last name. |
| First Name | Yes | Enter the first name. |
| Preferred Name | No | Enter the preferred name. |
| Title | No | Select a title from the drop down list. |
| Suffix | No | Enter a suffix, such as Mr., Mrs., Ms., Dr. |
| Gender | No | Select gender from the drop down list. |
| Personal Phone Book | No | To change the phone number, click the phone book icon. |
| Lifetime Value | No | View the lifetime value of the person. |
| External System Number | No | View the external system number. |
| Last Name Pronunciation | No | Enter the pronunciation of the last name. |
| First Name Pronunciation | No | Enter the pronunciation of the first name. |

| Field | Required Field | Description |
|-----------------------------|----------------|--|
| Middle Name | No | Enter the middle name. |
| Second Title | No | Enter the second title, if desired. |
| Date of Birth | No | Select the date of birth by clicking the calendar icon and choosing a date. |
| Native Language | No | Select the native language from the drop down list. |
| Personal Email Address Book | No | Select an email address by clicking the email phonebook and choosing an address. |
| Last Order Date | No | View the last order date. |
| Status | No | Select from the drop down list. |

4. In the Personal Addresses section you can edit information such as:
 - Identifying Address: Main address used to identify the person
 - Address History: Address history of the person
 - Map It: Map the address by clicking the icon
 - Phone book: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
 - Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
 - End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
 - Status: Displays the status indicated in the details
 - Type: Displays the address type indicated in the details
 - Select an Existing Address: Enter a full or partial address and click **Go**
 - Create Address: To create an address, click **Create Address**
5. In the Product Interests section you can edit information such as:
 - Remove: To remove a product interest item, select the Remove check box
 - Product: Select a product from the drop down list
 - Comments: Enter comments directly into the comments field

6. In the Personal Interests section you can edit information such as:
 - Remove: To remove a personal interest item, select the Remove check box
 - Interest Type: Select an interest type from the drop down list
 - Comments: Enter comments directly into the comments field
7. In the Restrictions section you can edit information such as:
 - Remove: To remove a restriction item, select the Remove check box
 - Restriction Type: Select a restriction type from the drop down list
 - Start Date: Select a start date by clicking the calendar icon and choosing a date
 - End Date: Select an end date by clicking the calendar icon and choosing a date
 - Reason: Enter a reason into the field
8. Click **Update**.

You can also get directions to the address by clicking the Map icon in the Map It column.

You can view a history of all the previous occupants of the physical address by clicking the **Address History** link.

Searching for a Person

Steps

Follow these steps to search for a person from the Customer tab:

1. From the **Customer** tab, select the **Person** subtab.
2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

- Choose Person from the drop down list.
- Enter the full or partial last name.
- Click **Go**.

To search using **Advanced Search**:

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

The Person Search page opens.

2. Enter search filters and display options.
3. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button. To use the list as a summary page default, select the "Use as Summary Page Default" check box.
4. To select the person, click the person's link.

Sending Collateral (Person)

Send collateral to your business contacts using this feature.

Prerequisites

Fulfillment templates must be set up in the Oracle Marketing Encyclopedia System (MES). Please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures* guide for more information on setting up fulfillment templates.

Steps

Follow these steps to send collateral:

1. Select the recipients to which you want to send collateral.
2. Click **Send Collateral**.

The Fulfillment Wizard page opens.

3. Select a Template from the drop down list.
4. Click **Continue**.
5. Select a Master Document by selecting the check box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Select the Output Method (email) from the drop down list, and click **Continue**.

The Fulfillment Request Confirmation page opens.

8. Select the Priority from the drop down list.
9. Click **Done**.

Creating and Maintaining Relationships (Person)

In Oracle Partners Online, people can have two types of relationships; Person to Organization and Person to Person. Each relationship is created by clicking the Relationship link from the **Customer** tab, **Person** subtab. You can display active, inactive, or all relationships for the person by selecting the appropriate value from the drop down list by clicking the Relationships link. The Relationships link takes you to the Relationships summary page. From this summary table you can view existing Person to Organization, Person to Person relationships, multiple relationship addresses, phone number, start date, end date, and relationship status.

- [Create a person to organization relationship](#)
- [Create a person to person relationship](#)

Creating a Person to Organization Relationship

Prerequisites

None

Steps

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

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**.

3. Click the person's name link to select it.

The Person Detail Main page opens.

4. Click the **Relationships** link.
5. Click **Add Relationship** in the Person to Organization Relationships section.
The Add Person to Organization Relationship page opens.
6. Search for an organization by entering the full or partial name of the organization in the “Select an Organization” field, and click **Go**.
7. From the Search Results page, select an organization for which you want to create a relationship by clicking the organization’s link. The organization will populate the related Organization field, a required field, on the relationship detail page.
8. Choose a Relationship Type from the drop down list.
9. Enter a Start Date and optionally enter an End Date. If you do not enter a start date, it will default to the current date.
10. Optionally, select a phone number by clicking the Phone book icon.
11. Select a status from the drop down list.
12. In the Notes section, you can enter a note by selecting the note type from the drop down list, and entering the note text in the text field.
13. Click **Create**.

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

1. View the relationship type.
2. Edit the start date by clicking the calendar icon and selecting another date.
3. Edit the phone number by clicking the phone book icon.
4. Edit the mail stop, department, job title.
5. Select the preferred language from the drop down list.
6. Select or unselect the Decision Maker and Reference check boxes.
7. In the Address section, you can change the following:
 - Identifying address, select or unselect the radio button
 - View the address history by clicking **History**
 - Map the address by clicking the Map It icon

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

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

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

Creating a Person to Person Relationship

Use these steps to create a relationship such as; Mary Kline reports to Ken Smith.

Prerequisites

None

Steps

Follow these steps to create a person to person relationship:

- 1.** From the **Customer** tab, choose the **Person** subtab.
The **People** page opens
- 2.** Select **Quick Find or Advanced Search**.
To search using **Quick Find**:

- Choose Person from the drop down list.
- Enter the full or partial name using % as a wildcard.
- Click **Go**.

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

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

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

4. Click the **Relationships** link.

From the Person Detail main page, you can do the following in the Person to Person Relationships section:

- View active, inactive, or all relationships for this person
- Edit start and end dates by clicking the calendar icon and selecting another date
- View the status of the relationship
- Send collateral by selecting the Collateral Recipient check box and clicking **Send Collateral**

5. Click **Add Relationship**.

The Add Person to Person Relationship page opens.

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

7. From the Search Results page, select the person for which you want to create the relationship by clicking the person's link.

The person's name populates the related Person field, a required field, on the Relationship Detail page.

8. Enter the address.

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

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

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

15. Click **Update**.

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

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

Leads (Person)

From the Person subtab, you can maintain lead details.

- [Maintain leads](#)

Maintaining Lead Details (Person)

Steps

Follow these steps to main lead details:

1. Search for a person for which you want to edit lead details.

To search using **Quick Find**:

- Choose Person from the drop down list.
- Enter the partial name of the person for which you are searching.
- Click **Go**.

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The People Search page opens.

- Select search filters and display options.
 - If you want to save the search enter a Search Name.
 - Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.
2. Click the person's link to select it.
The Person Detail Main page opens.
 3. Click the **Leads** link.
The Leads summary page opens.
 4. Select a lead by clicking the lead link.
The Lead Detail page opens.
The following table describes each of the lead detail fields.

Lead Detail Fields

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

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

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

Purchase Items-Lead Detail Fields

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

5. Click Update.

Creating Opportunities (Person)

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

1. From the **Customer** tab, choose the **Person** subtab.

The **People** page opens.

2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

- Choose Person from the drop down list.
- Enter the full or partial name using the% as a wildcard.
- Click **Go**.

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**.

3. Select a person by clicking the person's link.

The **Person Detail** page opens.

4. Click the **Opportunities** link.

5. Click **Create**.

The Create Opportunity page opens.

6. From this page you can enter opportunity details, purchase items, contacts, and [notes](#) information. Any field with an asterisk is a required field.

7. Click **Create**.

If you select the Display Contact Opportunities radio button on the Person Detail Main page shows all opportunities in which this person is a contact on

the opportunity. If you select the Display Person Opportunities radio button, you will see all opportunities in which the opportunity is for the person.

Notes (Person)

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

- [Create a note](#)
- [View a note](#)

Creating a Note (Person)

Prerequisites

None

Steps

Follow these steps to create a note:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find** or **Advanced Search**.

To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**. To apply the search and save the search at the same time, choose the **Save and Apply Search** button.

3. Select a person by clicking the person's link.

The **Person Detail** page opens.

4. Click the **Notes** link.
5. Select a Type from the drop down list.
You can change the default type by changing the Profile. Click the Profiles icon in the upper right corner of the application page.
6. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
7. Enter your notes in the text box.
8. Click **Create**.

Note: You cannot edit notes once they are created.

Viewing a Note (Person)

Prerequisites

None

Steps

Follow these steps to view a note:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person by clicking the person's name link.
The **Person Detail** page opens.
4. Click the **Notes** link.
5. Select a Type from the drop down list.
6. Choose the number of days for which you want the notes history.
7. Click **Apply**.

If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

Click the **All Notes** button to view all the notes in a printer-friendly format. The first characters of the note are displayed in the table. Click the **Text** icon to see the entire note.

Note: The profiles that you have chosen determine the number of rows that will display in your notes table. To change your profile preferences, see [Setting Customer Preferences](#).

Sales Teams (Person)

Sales teams represent all of the salespeople and partners that have ownership of a specific customer. Sales team members can have full access or non-full access (view only) ownership.

- [Add a sales team member](#)
- [Add a partner](#)
- [Add a resource team](#)
- [Remove a sales team member](#)

Adding a Sales Team Member (Person)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Customer** tab, choose the **Person** subtab.

2. Select Quick Find or Advanced Search.

To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

3. Select a person by clicking the person's link.

The **Person Detail** page opens.

4. Click the Sales Team link.**5. Enter the last name of the sales representative in the Add a Salesperson field.****6. Click Go.****7. Choose from the company menu, click Go.****8. Click the salesperson link.****9. Click Update.**

If you want to associate this salesperson with a customer location for the purpose of territory assignment:

1. Enter the location.
2. Click **Go**.

Adding a Partner (Person)

Prerequisites

None

Steps

If you want to add a partner to the sales team:

1. From the **Customer** tab, choose the **Person** sub tab.

To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.
- Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.

2. Select a person by clicking the person's link.

The **Person Detail** page opens.

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

4. Enter the partner name in the Add a Partner field, click **Go**.

It is recommended that you search by last name only.

5. Select a partner from the search results list.

6. Click **Update**.

You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner.

Adding a Resource Team (Person)

Prerequisites

None

Steps

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

1. From the Customer tab, select a person by:
To search using **Quick Find**:
 - Choose Person from the drop down list.
 - Enter the full or partial name of the person. If you enter a partial name, use the % key as a wild card.
 - Click **Go**.To search using **Advanced Search**:
 - Click the **Advanced Search** link.
 - The Person Search page opens.
 - Enter search filters and display options.
 - Optionally enter a Search Name, if you want to save the search.
 - Click **Search**.
2. Click the person's link to select it.
The Person Detail page opens.
3. Click the **Sales Team** link.
4. In the Add a Resource field, enter the resource name or the wildcard and click **Go**.
5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

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

Removing a Sales Team Member (Person)

Prerequisites

A sales team member must exist on the sales team.

Steps

Follow these steps to remove a sales team member:

1. From the **Customer** tab, choose the **Person** subtab.
To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
 - The Person Search page opens.
 - Enter search filter information and display options.
 - Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
2. Select a person by clicking the person's link.
The **Person Detail** page opens.
 3. Click the **Sales Team** link.
 4. Locate the sales person that you want to remove from the sales team.
 5. Select the **Remove** check box.
 6. Click **Update**.

Tasks (Person)

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

- [Create a task](#)
- [Maintain task details](#)
- [Add an attachment to a task](#)

Creating a Task (Person)

Prerequisites

None

Steps

Follow these steps to create a task:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find or Advanced Search**.
To search using **Quick Find**:
 - Choose Person from the drop down list.
 - Enter the full or partial name.
 - Click **Go**.To search using **Advanced Search**:
 - Click the **Advanced Search** link.
 - The Person Search page opens.
 - Enter search filter information and display options.
 - Click **Search**. To apply the search and save the search as the same time, choose the **Save and Apply Search** button.
3. Select a person from the Search Results page by clicking the person's name link.
The **Person Detail** page opens.
4. Click the **Tasks** link.
5. Click **Create**.
6. Select Task Type from the drop down list.
Note: If the task is a private task, select the **Private** box. This task can only be assigned to you.
7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the **Priority** from the drop down list.
10. Select the **Status** from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the person you are assigning the task, click **Go**.

14. The “Relate to” field defaults to the person, click **Go**.

Note: If you click the **Clear** button from within this page, you will clear all information, including the Person the task is related to. If you continue creating this task by re-entering the information, this task will not be related to this person.

15. Click **Create**.

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

Maintaining Task Details (Person)

Prerequisites

A task must exist.

Steps

Follow these steps to view a task:

1. Navigate to the person for which you want to view the task.
2. Click the person’s link.

The Person Detail main page opens.

3. Click the Tasks link.

The summary table displays all tasks for the person.

4. Click the task link to view details.

The Task Detail page opens.

The following table describes the Task Detail fields.

Task Detail Fields

| Field | Required Field | Description |
|--------------|-----------------------|---|
| Task Type | Yes | Select the task type from the drop down list. |
| Private | No | Select the private check box if you want the task to be viewable only by the creator of the task. |
| Task Name | Yes | Enter the task name. |

| Field | Required Field | Description |
|------------------|----------------|--|
| Task Description | No | Enter a description. |
| Priority | No | Select priority from the drop down list. |
| Date | Yes | Select a date by clicking the calendar and choosing a date. |
| Start Time | No | Select a time from the drop down lists. |
| Parent Task | N/A | View the parent task details by clicking the link. |
| Owner | Yes | Enter the full or partial name, using % as a wildcard, and click Go . Select from the search results. |
| Status | No | Select the task status from the drop down list. |
| End Time | No | Select an end time for the task from the drop down list. |
| Add Attendee | No | Select attendees by entering the full or partial name and clicking Go . |
| Remove | No | To remove an attendee, select the remove check box. |
| Employee | No | Displays the employee who is listed as an attendee. |
| Sales Group | No | Displays the sales group the attendee belongs to. |
| Job Title | No | Displays the job title of the attendee. |
| Phone Number | No | Displays the phone number of the attendee. |
| Email | No | A link to the attendee's email. |
| Remove | No | Select the remove check box to remove a relate to item. |
| Type | No | Displays the related item type. |
| Name | No | Displays the related item name. |
| Task Name | No | Links to the child task details. |
| Task Type | No | Displays the child task type. |
| Date | No | Displays the child task date. |

5. Click **Update**.

Interactions (Person)

An interaction is a point of contact and may relate to customers, campaigns, agents, orders, and quotes. This point of contact could be a direct interaction with a customer, the customer's system, a potential customer, or through an automated agent. An interaction is generally timed and has an outcome or result that can be tracked. Multiple activities can occur during the course of a customer interaction.

Oracle Partners Online users cannot create or edit interactions.

- [View interactions](#)

Viewing Interactions (Person)

Prerequisites

Interactions must exist.

Steps

You can view interactions entered by sales, marketing, and service department representatives.

Follow these steps to view interactions:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select **Quick Find or Advanced Search**.

To search using **Quick Find**:

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

To search using **Advanced Search**:

- Click the **Advanced Search** link.
- The Person Search page opens.
- Enter search filter information and display options.

- Click **Search**. To apply the search and save the search at the same time, choose the **Save and Apply Search** button.
- 3. Select a person from the Search Results page by clicking the person's name link. The **Person Detail** page opens.
- 4. Click the **Interactions** link.
- 5. You can select filters such as Media Type, Activity, Source, and Date Ranges.
- 6. Click **Apply** to search for interactions.

Note: Oracle Partners Online users cannot create or edit interactions.

For more detailed information about interactions, please refer to the *Oracle CRM Foundation Concepts and Procedures* guide.

Attachments (Person)

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

- [Add an attachment](#)
- [View an existing attachment](#)

Adding an Attachment (Person)

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. From the **Customer** tab, choose the **Person** subtab.
2. Select a person.
The **Person Detail** page opens.
3. Click the **Attachments** link.
4. Click **Add**.

The **Add Attachment** page opens.

5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

Viewing an Existing Attachment (Person)

To view an existing attachment, click the attachment link from the person's detail page.

Accounts (Person or Organization)

You can create accounts and maintain the account details from the Person subtab. Click one of the links below to go to the step-by-step instructions in the Customer, Organization section on how to:

- [Create an account](#)
- [Maintain account details](#)
- [View sites](#)
- [View roles](#)
- [View relationships](#)

360 Degree View (Person)

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

- [Viewing 360 degrees \(Person\)](#)

Viewing 360 Degrees (Person)

Prerequisites

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

Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, choose a person.
The **Person Detail** page opens.
2. Click the **360 View** link.
A new Person Detail page, specific to the 360 Degree View, opens.
3. You can view summary pages for each of the following by clicking each link:
 - Orders
 - Invoices
 - Returns
 - Products
 - Service Requests
 - Quotes
4. Click the link to view the details of any item.

Maintaining Quote Details

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

Prerequisites

A quote must exist.

Steps

Follow these steps to maintain quote details:

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

Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab. Please refer to the *Oracle Customer Intelligence Concepts and Procedures* guide for more information about these reports.

Partner Tab

Use the Partner tab to view Sales partners and Exchange partners by selecting from the View By drop down list and clicking Apply.

- [Create a partner](#)
- [Create a person/contact](#)

- [Adding Partner profile](#)

Please refer to the *Oracle Partners Online Concepts and Procedures* guide for more information.

Create a Partner

Prerequisites

None

Steps

Follow these steps to create a partner:

1. From the **Partner** tab, click **Create**.

The Create Partner page opens.

The following table describes the Create Partner fields.

Create Partner Fields

| Field | Required Field | Description |
|-------------------|-----------------------|---|
| Find Organization | No | Find an organization by entering a name, selecting a state and clicking Go . |
| Organization | Yes | Enter the organization. |
| Alias | No | Enter an alias, if applicable. |
| Phone Number | No | Enter a phone number. |
| Phone Type | No | Select a phone type from the drop down list. |
| Email Address | No | Enter an email address. |
| Customer Category | No | Select a customer category code from the drop down list. |
| Annual Revenue | No | Select an annual revenue currency from the drop down list and enter the annual revenue. |
| Fiscal Year End | No | Select the fiscal year end from the drop down list. |
| Total Employees | No | Enter the total number of employees. |
| Year Established | No | Enter the year established. |

| Field | Required Field | Description |
|---------------|-----------------------|--|
| Web Site | No | Enter the web site address. |
| Do Not Mail | No | Select the do not mail check box if the partner should not receive mail. |
| Business Line | No | Enter the business line. |
| SIC Code | No | Enter the Standard Industry Code. |
| DUNS Number | No | Enter the Dunn and Bradstreet number. |
| Tax ID | No | Enter the tax identification number. |

To enter partner details, use the following table to identify the Partner Detail fields.

Partner Detail Fields

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

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

Address Fields

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

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

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

Person Relationship Fields

| Field | Required Field | Description |
|--------------|-----------------------|---|
| Add a Person | Yes | If you are going to add a person relationship, enter the full or partial name and click the Go button. |
| Erase | No | To erase a relationship from the summary table, click the erase icon. |
| Title | No | Select a title from the drop down list. |
| First Name | No | Enter the first name. |
| Last Name | Yes | Enter the last name. |
| Relationship | Yes | Select a relationship from the drop down list. |
| Phonebook | No | Select a phone number from the list of phone numbers by clicking the phonebook icon. |

| | | |
|-------------------|----|--|
| Email Addressbook | No | Select an email address by clicking the email address book icon. |
| Job Title | No | Enter a job title. |
| Decision Maker | No | Select the decision maker check box if the person is a decision maker. |

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

Organization Relationship Fields

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

2. Click **Create**.

Create a Person/Contact

Prerequisites

None

Steps

Follow these steps to create a contact:

1. From the **Partner** tab, click the **Person** subtab.

From this page you can create new contacts, send collateral to existing contacts, or update contact information.

2. Click *Create*.

The Create Person page opens.

3. The only required fields are Last Name and First Name, indicated with an asterisk.

The following table describes each field in the Create Person page.

Create Person Fields

| Field | Required Field | Description |
|---------------------|-----------------------|---|
| Last Name | Yes | Enter the last name. |
| First Name | Yes | Enter the first name. |
| Preferred Name | No | Enter a preferred name, if applicable. |
| Title | No | Select a title from the drop down list. |
| Suffix | No | Enter a suffix, if applicable. |
| Gender | No | Select a gender from the drop down list. |
| Status | No | Select a status from the drop down list. |
| Phonetic Last Name | No | Enter the phonetic last name. |
| Phonetic First Name | No | Enter the phonetic first name. |
| Middle Name | No | Enter the middle name. |
| Second Title | No | Enter the second title, if applicable. |
| Date of Birth | No | Select a date of birth by clicking the calendar icon and choosing a date. |
| Native Language | No | Select the native language from the drop down list. |

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

Business Information Fields

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

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

Personal Information Fields

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

5. In the Notes sections, you can enter notes associated with this person.

- Select the note type from the drop down list.
- Enter text in the Text box.
- Click **Create**.

You have successfully created a person when the Person Detail Main page opens.

6. Click **Create**.

To find more information about partners, refer to the *Oracle Partners Online Concepts and Procedures* guide.

Adding Partner Profile

Prerequisites

Log in as Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Attribute Link for a Particular Partner

Steps

1. Select a profile Attribute from a drop down list.
2. Select a value from a list of available choices.
3. Click Update.
4. Repeat steps one and two to defined additional profile attributes.
5. Click Update.

Guidelines:

When attributes are associated for a particular Partner on the user interface, the concurrent program PV- Refresh Attribute Text table must be run, so that this data becomes available to the Partner Matching program.

Service Tab

Oracle Partners Online Service tab consists of three subtabs:

- **Ask Me**
- **View/Update Service Request**
- **Create Request**

For further information of using the Service request tab in Oracle Partners Online, please refer to *Oracle iSupport Concepts and Procedures Guide*.

My Company Tab

The My Company tab allows the Partner to view information specific to their company.

[View My Details](#)

[View My Contacts](#)

Viewing My Company's Main Details

Use this page to see details of your company, if you work for a Partner organization: annual revenue, total employees, business category, addresses and other identifying information.

Use the following procedures to view My Company's main details.

Prerequisites

Login as a Partner, Vendor or VAD User/Administrator and navigate to the following

My Company > Organization Subtab > Organizations Details-Main Link

To view more specific details about the organization, click the appropriate link

Viewing My Contacts

Use this page to view profiles of Partner contacts. Click links to see more detail about specific sales representatives. Only the main business-related details are supplied.

Use the following procedures to view My Contacts.

Prerequisites

Login as a Partner User/Administrator or VAD User/Administrator and navigate to the following

My Company > Person Subtab > Specific Person Link > Person Detail-Main Link

Compensation Tab

Oracle Partners Online's Compensation tab consists of four subtabs; Planning, Compensation Plan, Income Planner, and Reports. Depending on your sales role, you can use the Compensation tab to do the following:

- View your quota estimate
- Estimate your commissions using Income Planner
- Review commission reports

- Allocate quotas
- Approve compensation plans

For information about using the compensation functionality in Oracle Partners Online, please refer to the *Oracle Incentive Compensation Concepts and Procedures* guide.

Fulfillment Tab

The Fulfillment tab allows you to send centrally stored collateral to your customers. Collateral is defined as email, fax, or letter templates that are set up in the Marketing Encyclopedia System (MES) application. The 1:1 Fulfillment Wizard will walk you step-by-step through the process of [sending collateral](#).

Sending Collateral

Send collateral to your business contacts using this feature.

Prerequisites

Fulfillment templates must be set up in the Oracle Marketing Encyclopedia System (MES). Please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures* guide for more information on setting up fulfillment templates.

Steps

Follow these steps to send collateral:

1. Select the recipients to which you want to send collateral.
2. Click **Send Collateral**.
The Fulfillment Wizard page opens.
3. Select a Template from the drop down list.
4. Click **Continue**.
5. Select a Master Document by selecting the check box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Select the Output Method (email) from the drop down list, and click **Continue**.
The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list, and click **Done**.

Option 2

Optionally, you can send collateral by following these steps.

1. From the Fulfillment tab, click the Status subtab.
2. Click **Create**.
3. Enter Person Search criteria, click **Search**.
4. Click **Send Collateral**.

The Fulfillment Wizard page opens.

5. Select a Template from the drop down list.
6. Click **Continue**.
7. Select a Master Document by selecting the check box, click **Continue**.
8. Select Collateral, click **Continue**.
9. Select the Output Method (email) from the drop down list, and click **Continue**.

The Fulfillment Request Confirmation page opens.

10. Select the Priority from the drop down list, and click **Done**.

Note: Only Master Documents (mail merge template) and Collateral (attachments to email) attached to a template in MES (setup in Fulfillment Manager) will appear for selection once a template is selected for a fulfillment request. You can use only one template per request.

Encyclopedia Tab

Oracle Partners Online's Encyclopedia tab includes four subtabs; Category, My Channels, Publish, and Administration.

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

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

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

Administration Tab

This topic group details Administrative setup procedures for Oracle Partners Online. For further information with regard to implementation procedures, refer to *Oracle Partners Online Implementation Guide*.

[Registration Setup](#)

[Timeout Setup](#)

[Status Notification Setup](#)

[Channel Marketing Manager Setup](#)

[Profile Attribute Setup](#)

Registration Setup

Use this procedure to setup the registration of Users.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Registration Link

Steps:

1. Create or Update the User.
2. Fill in all required fields.
3. Click Update.

Timeout Setup

Use this procedure to setup Time-outs.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Timeout Link

Steps:

1. Select the Timeout type (Channel Manager or Partner).
2. Fill in all required fields.
3. Click Apply.

Status Notification Setup

Use this procedure to setup Status Notifications.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Status Notification Link

Steps:

1. Select the Status type
 - **Opportunity:** Describes the status of an opportunity and who is notified regarding that status.
 - **Routing:** Describes the status of the routing of a particular opportunity, and who is notified regarding that status.
2. Fill in all required fields.
3. Click Apply.

Channel Marketing Manager Setup

Use this procedure to setup the Channel Marketing Manger.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Channel Marketing Manager Link

Steps:

To **Add** a Channel Marketing Manager:

1. Fill in all required fields.

2. Click Update.

To **Remove** a Channel Marketing Manager:

1. Select the Channel Marketing Manger to be removed.
2. Select the Remove box.
3. Click Update.

Profile Attribute Setup

Create Profile Attribute

Prerequisites

Log in as Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Attribute Values Link

Steps

1. Enter Attribute Name.
2. Enter Attribute Description.
3. Enter Attribute Short Name.
4. Enable Attribute for the Partner and/or the Opportunity.
5. Specify 'rank' for recommended and/or manual matching process.
6. Click Update.

Disable Profile Attribute

Prerequisites

Log in as Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Attribute Values Link

Steps

1. Check 'Disable' flag for the desire Profile Attribute.
2. Click Update.

Setting Up Partner Attribute Values

Define more specific identifying attributes to use in Partner matching:

Prerequisites

Log in as Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Attribute Values Link

Steps

1. Select the general attribute from the list of values, "Functional Expertise" and click Apply.
2. Define values specifically.
3. Create other attributes, if needed.
4. Click Update.

