

# Oracle<sup>®</sup> Sales Online

Implementation Guide

Release 11*i*

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**Oracle Sales Online Implementation Guide, Release 11i**

**Part No. A97666-01**

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

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# Preface

## Intended Audience

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

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

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

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

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

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

## How To Use This Guide

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

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

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

This guide includes the following chapters and appendixes:

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

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

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

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

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

## About User Interfaces (HTML and Forms)

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

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

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

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

## How This Guide Represents Navigation

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

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

For example:

### **Forms Navigation:**

**HRMS Setup > Organization**

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

The HTML navigation path is composed of the following:

**Tab > Subtab > Side Navigation Panel Heading > Link**

For example:

### **HTML Navigation**

**Administration > Sales > Call Center > Campaign Assignment**

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

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

For example:

### **Forms Navigation**

**Administration > Administration**

### **HTML Navigation**

**Administration > Sales > Call Center > Campaign Assignment**

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

## 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 Sales Online.

If this guide refers you to other Oracle Applications documentation, use only the Release 11i 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 Sales 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 Sales 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 Sales 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**

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

### **Installing Oracle Applications, Release 11i**

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

### **Oracle Applications Concepts**

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

### **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7

(NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

### **Maintaining Oracle Applications**

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

### **Oracle Applications Product Update Notes, Release 11*i***

This document contains information about new product features and functions for various Oracle applications.

### **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

### **Oracle Alert User's Guide**

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

### **Oracle Applications Developer's Guide**

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

### **Oracle Applications User Interface Standards for Forms-Based Products**

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

## **Other Implementation Documentation**

### **Multiple Reporting Currencies in Oracle Applications**

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

### **Multiple Organizations in Oracle Applications**

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

### **Implementing CRM Applications**

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

### **Implementing Oracle HRMS**

This document provides the information necessary to implement Oracle HRMS.

### **Oracle Incentive Compensation Implementation Guide**

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

## **Training and Support**

### **Training**

Oracle offers training courses to help you and your staff master Oracle Sales 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 Sales 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 Oracle8i server, and your hardware and software environment.

## Oracle Metalink

Oracle Metalink is your self-service support connection with web, telephone menu, and email 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.



# Part I

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## Getting Started

This section of the contains the following chapters:

- [Chapter 1, "Introduction"](#)
- [Chapter 2, "Before You Begin"](#)



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# Introduction

This chapter provides an overview of the Oracle sales family of applications and its components and lists new functionality for this release. Topics include:

- [Section 1.1, "Oracle Sales Family Overview" on page 1-1](#)
- [Section 1.2, "Oracle Sales Online Overview" on page 1-2](#)
  - [Section 1.2.1, "New in this Release" on page 1-4](#)
  - [Section 1.2.14, "Obsolete in this Release" on page 1-10](#)
- [Section 1.3, "Oracle TeleSales Overview" on page 1-11](#)
  - [Section 1.3.1, "New in This Release" on page 1-12](#)
  - [Section 1.3.16, "Obsolete in This Release" on page 1-21](#)
- [Section 1.4, "Oracle Field Sales/Wireless Overview" on page 1-22](#)
- [Section 1.5, "Architecture and Technology" on page 1-22](#)

## 1.1 Oracle Sales Family Overview

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

The Oracle sales family of applications includes:

- Sales Online

- TeleSales
- Incentive Compensation
- Partners Online
- Sales Intelligence

## 1.2 Oracle Sales Online Overview

Sales Online includes the following functionality:

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

### **Customer and Contact Management**

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

### **Opportunity Management**

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

## Opportunity and Product Category Forecasting

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

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

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

Managers can create their own views of their sales representatives' forecasted opportunities and can also track forecast adjustment histories.

## Notes, Tasks, and Attachments

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

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

## Interactions

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

## **Partners**

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

## **Incentive Compensation**

Integration with Oracle Incentive Compensation enables Sales Online to align sales force behavior with business goals and imperatives.

Sales representatives can view their compensation summary and break down their commissions by deal, product line, period, adjustments, and transactions.

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

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

## **Collateral Fulfillment**

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

## **Marketing Encyclopedia System**

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

### **1.2.1 New in this Release**

The following features are new to Oracle Sales Online:

- [Section 1.2.2, "Contact List Execution"](#)
- [Section 1.2.3, "Opportunity Forecast by Product Category"](#)
- [Section 1.2.4, "Territory Assignment by Resource Groups"](#)
- [Section 1.2.5, "Opportunity History Functionality"](#)
- [Section 1.2.6, "Security Enhancements"](#)
- [Section 1.2.7, "Opportunity Competitors"](#)

- [Section 1.2.8, "Opportunity Owner"](#)
- [Section 1.2.9, "Opportunity Classification Report"](#)
- [Section 1.2.10, "Opportunity Level Sub-total by Product Category"](#)
- [Section 1.2.11, "Lead to Opportunity Conversion"](#)
- [Section 1.2.12, "Product Category List of Values \(LOV\)"](#)
- [Section 1.2.13, "Forecast Default Setup"](#)

## 1.2.2 Contact List Execution

During contact list execution you can do the following:

- Sort the list based on Customer, Contact, or Priority
- View contact details
- Get an overview of all the tasks that are related to a particular contact
- Create follow-up tasks for the contact

This functionality was designed for the salespeople who need to call contacts using a list, based on user specified criteria.

## 1.2.3 Opportunity Forecast by Product Category

In previous releases, the forecasting system allowed users to forecast individual opportunities. In this release users can provide more granular forecasts on these opportunities. Users can now save their opportunity worksheets by including the best case/worst case and forecast amounts for each product category within an opportunity.

A system level profile option has been introduced "OS: Allow Opportunity Forecast by Product Category".

- If this profile is set to "No" the opportunity worksheet will behave as in prior releases where users can apply their commitments for the entire opportunity.
- If this profile is set to "Yes" the opportunity worksheet will be further broken down into the product categories, which are part of that opportunity. These product categories will however be filtered based on the forecast category specified on the opportunity worksheet. The system will default the forecast values for the product category.

The users can either enter their commitments at a more granular product category level and the numbers will be rolled up to the entire opportunity, or enter the numbers for the entire opportunity and the system will calculate the forecast numbers for the product categories.

## 1.2.4 Territory Assignment by Resource Groups

Administration of territories is a major challenge for most organizations. In order to improve the administration of these territories, the territory assignment program will include the ability to assign resources to sales teams for customers, opportunities, or leads, based on resource groups and/or resource teams. Administrators can create resource teams and assign the resource teams to territories. The Territory Assignment program will then assign access to the members of these resource teams. Any changes made to the resource team will be picked up by the territory assignment program and the members of this changed team will be granted access to customers, opportunities, or leads. By re-using the teams within different territories the territory administrators will have to adjust the resource teams once to influence all the territories accurately.

## 1.2.5 Opportunity History Functionality

This release provides the ability to track changes made to an opportunity. Updates to any of the following fields will result in an audit trail, the user who changed the information and the date/time of the change, in an Opportunity History table. The following columns within the opportunity are tracked:

- Customer address
- Status
- Channel
- Stage
- Win probability
- Close date
- Total amount
- Currency code

In the previous release the product stores this information in the system and is available for custom reporting.

## 1.2.6 Security Enhancements

### Flexible Party Create Restrictions

In previous releases Sales Online provided security around the update of customer data in the application (such as organizations, persons or contacts. However, any non-admin user who had access to the system could create new organizations, contacts or persons. In this release, Sales Online provides profile options to control the creation of customer data. The following new profiles have been added:

- OS: Create Organization Privilege: Controls creation of organizations
- OS: Create Person Privilege: Controls creation of persons
- OS: Create Contact Privilege: Controls creation of contacts

The values for these profiles should be set to 'Yes', for a user to be able to create an Organization, Person or Contact respectively. If it is 'No', then the create buttons will not show up for these users.

There are some exceptions to this rule. The create option will not be available for users who satisfy any of the following criteria irrespective of the profile setting.

- The logged in user has a Sales Admin role, or
- If the create page has been excluded using function security for the logged in user.

This functionality provides the flexibility to grant access to a limited set of sales reps to create sensitive customer information.

### Full Access on Customer Sales Team

In this release 'Full Access' checkbox option has been added to the Organization Sales Team and Person Sales Team (similar to the Opportunity Sales Team). This option will be used to determine whether the user on the Organization/Person Sales Team has view-only or update access on the Organization/Person

This functionality will provide flexibility to add sales reps to the customer sales team with read only access, a feature that was missing in earlier releases.

### Access Restrictions on Addresses

In this release the customer/contact access restrictions will be applied to the addresses as well. A user will be able to create or update addresses only if the user has updated access to the Organization or Person.

## 1.2.7 Opportunity Competitors

The following features have been added in 11.5.8 to enhance competitor tracking on opportunities:

- Users can enter a key competitor for the entire opportunity. This is in addition to, and not related to, the multiple competitors that can be entered for each Purchase Item.
- Administrators can choose to make the Key Competitor mandatory during opportunity creation. A system level profile 'OS: Competitor Required for Opportunity' has been created to enforce whether the Key Competitor is required for an Opportunity.
- To improve the usability of the competitor tracking a competitors sub tab has been provided to show a consolidated list of all the competitors and competitor products that are applicable to the entire opportunity. The users can also enter the competitors for individual lines within the opportunity directly by using this sub tab. Also the users can also change the key competitor here.

## 1.2.8 Opportunity Owner

Within the different members on the opportunity sales team, one member can be flagged as the opportunity owner. By default, the creator of the opportunity is the opportunity owner. The only person who can change ownership of the opportunity is the current owner. If territory assignment is implemented, then the opportunity owner will be assigned through the territory assignment program. The default is that the first person on the sales team is assigned the opportunity.

## 1.2.9 Opportunity Classification Report

In previous releases, the application provided a way to classify organizations, contacts, and people using TCA party classification. In this release, Oracle Sales Online provides the capability to report on them. Users can run the report based on how the organizations, persons, contacts are classified in the system.

## 1.2.10 Opportunity Level Sub-total by Product Category

In this release, users have the ability to display the opportunity total amount by product category.

- A system level profile option is being shipped with the product called " OS: Display Purchase Line Sub Total".

- If this profile is set to 'No' then the opportunity grand total will display as it does today.
- If the profile is set to 'Yes' then a table will display the sub totals by the product category. This will allow users to see the split of the opportunity total amount across the product categories.

### 1.2.11 Lead to Opportunity Conversion

In this release when the lead is converted to an opportunity, the lead sales team can be carried over to the new opportunity. This will help users maintain continuity of the sales team. A profile option "OS: Lead to Opportunity Move Sales Team" controls this behavior.

- If this profile is set to "Yes" then the sales team is carried over to the opportunity.
- If the profile is set to "No" then the sales team is not carried over and only the sales person who creates the opportunity from a lead is added to the opportunity sales team.
- This feature is only available when the lead is converted to a new opportunity. If the lead is linked or lead lines are linked to an existing opportunity then the sales team members are not touched.

### 1.2.12 Product Category List of Values (LOV)

In this release, system administrators will have the flexibility to decide whether to have the product category selection on the opportunity details as either a drop down or an LOV. A new profile option will be provided, "OSO: Use Product Category LOV". If this profile option is set to "Yes" then the opportunity details and the create pages will include the product category selection as a LOV. If it is set to "No" then these pages will include product category as a drop down list.

System administrators need to look at the combinations of interest types, primary, secondary codes to decide whether to go with the product category LOV or the drop down. If the total number combinations are below twenty then it is recommended to choose the drop down as the default for the profile option as it provides an easy way for users to enter the information. If the total number combinations are over twenty, it is recommended that you choose "LOV" as the default for the profile option as it not only increases usability but also reduces the size of the page. This could help during remote operations over land lines.

### 1.2.13 Forecast Default Setup

During forecasting, the system allows the users to setup the default values for forecasting using either 0 (zero) or pipeline values. In this release, Sales Online has added another dimension in which the default forecast values could be generated. A new user profile will be available under the forecast preferences called "Pipeline Calculation Using". This profile will be used in conjunction with the profile "Default New Rows in Worksheet To". The values available for the profile "Pipeline Calculation Using" are System Defaults and Win Probability based defaults. This feature will also be used in the "One click" forecasting functionality of Sales Online.

If the profile "Default New Rows in Worksheet To" is set to "Pipeline" and the "Pipeline Calculation Using" is set to "System Defaults" then the forecasting system will default values as shown below:

Forecast = Weighted Pipeline amount

Best Case = Total Pipeline amount

Worst Case = Won to date amount

If the profile "Default New Rows in Worksheet To" is set to "Pipeline" and the "Pipeline Calculation Using" is set to "Win Probability Based Defaults" then the forecasting system will default values as follows:

Forecast = Sum of all opportunities with win probability  $\geq 60\%$

Best Case = Sum of all opportunities with win probability  $\geq 40\%$

Worst Case = Sum of all opportunities with win probability  $\geq 80\%$

If the profile "Default New Rows in Worksheet To" is set to "0" then the "Pipeline Calculation Using" profile will be ignored and the forecasting system will default values as follows:

Forecast = 0

Best Case = 0

Worst Case = 0

### 1.2.14 Obsolete in this Release

The following profiles in Oracle Sales Online are obsolete:

- OSO: Enable Lead Share
- OSO: Lead Share Application ID

- OSO: Lead Share Company Code
- OSO: Lead Share Default Org Text
- OSO: Lead Share Host Name
- OSO: Lead Share LETS Server
- OSO: Lead Share Partner ID
- OSO: Lead Share Port Number
- OSO: Lead Share Proxy Host
- OSO: Lead Share Proxy Port
- OSO: Lead Share Responsibility ID
- OSO: Lead Share Salesforce ID
- OSO: Lead Share User ID
- OS: Auto-relate lead note to Customer,
- OS: Auto-relate lead note to Primary Contact
- OS: Territory Minimum Number of Records for Parallel Processing
- OS: Territory Number of Child Processes
- OS: Territory Records to Open for Processing Changed Accounts

The following concurrent programs are obsolete:

- Refresh Materialized View for Forecast Reports

## 1.3 Oracle TeleSales Overview

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

- Oracle Collections: The eBusiness Center provides a view to delinquency information and the ability to open the Collections window to view details.
- Oracle Contracts: The eBusiness Center provides a view to contract information and a drill down to a contract.
- Oracle Customer Care: Relationship plans provide consistent alerts for expired opportunities, expired quotes, and contact restrictions.
- Oracle eMail Center provides the ability to click a customer's e-mail address to open a message and records the sent message as an interaction.
- Oracle Install Base provides install base information for the party in the eBusiness Center.
- Oracle Interaction Center to enable inbound/outbound call routing, predictive dialing, and call scripting functionality.
- Oracle Marketing Online (OMO) to provide a true close-loop marketing solution from campaign to cash.
- Oracle Sales Online (OSO) to enable collaborative selling between the field sales and inside-sales organizations.
- Oracle iStore to enable interactive selling on the web.
- Oracle Order Capture to enable integration with ERP applications.
- Oracle TeleService: The eBusiness Center provides a view of a party's service requests and the ability to view details for a service request.

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

### 1.3.1 New in This Release

The following new features have been added to Oracle TeleSales in this release.

- [Section 1.3.2, "Contact Management Enhancements"](#)
- [Section 1.3.3, "CTI Enhancements"](#)
- [Section 1.3.4, "Security Enhancements"](#)
- [Section 1.3.5, "Usage of OTS By Non-Sales Users"](#)
- [Section 1.3.6, "Opportunity Center"](#)

- [Section 1.3.7, "Contract and Install Base"](#)
- [Section 1.3.8, "HTML Calendar"](#)
- [Section 1.3.9, "Universal Search Additions"](#)
- [Section 1.3.10, "Collateral Fulfillment Enhancement"](#)
- [Section 1.3.11, "Collateral Changes"](#)
- [Section 1.3.12, "Task Enhancements"](#)
- [Section 1.3.13, "Oracle Email Center Integration"](#)
- [Section 1.3.14, "Search by Account in the eBusiness Center"](#)
- [Section 1.3.15, "Relationship Plan"](#)

## 1.3.2 Contact Management Enhancements

### **Global Address Formatting**

Address information appears in the eBusiness Center in both the header and the Phone/Address tab in a concatenated format. A Location field is added to the header and a Country field is added to the Phone/Address tab. Both contain a list of values (LOV) listing countries. When adding an address, a country is selected. You then click an ellipsis button next to the address to open the Address window and enter address information. The Address window contains fields formatted for the selected country as set up in your implementation. There is a new profile option, *OTS: Customer-Include Address Style In Concatenated Format*. If set to Yes, then the address style name (example US) appears at the beginning of the address field before the concatenated address.

Additional fields have been exposed or enlarged on the eBusiness Center due to the global address.

### **Sort by Party Name**

The party name in the Relationship Tab can be sorted by clicking the appropriate icon located above the table to sort in ascending or descending order.

### **Organization Profile**

A new tab, Party Interest, has been added to Organization Detail. Users can now not only track interest at the person and contact level but also at the organization level.

Additional fields such as Tax ID and Public Sector Agency are also exposed.

### **Person Profile**

A new button, Person Language, is added to the Person Tab to capture multiple languages. The Person Language UI allows for capturing Native and Primary Languages.

Additional fields such as Date of Birth, Household Income, Household Size, Rent/Own, and Tax ID are added.

### **Party Search Based Upon Account Role.**

It is possible to locate a contact based upon the role of the individual on an account. The result of an LOV search using the account field in the eBusiness Center includes the account role of the individual. When you select the correct role from the LOV result the eBusiness Center displays the corresponding party information. This capability allows businesses that are account centric to quickly identify the caller.

### **View Details For**

The View Details For radio button is replaced with a drop down list. The customer selected in the header is added to the list. When you select a customer account, tab information displays the following information:

- Overview Tab: Interactions related to the Party owning the account
- Account Tab: Queries the account selected
- Task Tab: Exposes tasks related to the account
- Notes Tab: Exposes notes related to the account

### **View For Relationship Addition**

You can now view leads, opportunities, and quotes for a relationship selected in the View Details For list.

### **Party LOVs**

The Organization, First Name, and Last Name LOVs list only active customer records. To include inactive as well as active records in these LOVs, set the profile option *OTS: Display In-Active Records For Party LOV* to Yes.

### **Filtering Active/In-Active Records**

In this release it is possible to retrieve inactive party record by using the LOV in the eBusiness Center header. To turn on this feature the system administrator must change the system profile *OTS: Display In-Active Records For Party LOV* to Yes. The default value is No.

## **1.3.3 CTI Enhancements**

### **Additional Toolbar Icons**

One additional icon, Next Call, is added to the eBusiness Center toolbar. Addition of this icon minimizes the number of clicks needed to retrieve inbound and outbound calls.

- **Next Call:** This button, enabled only in CTI mode, prompts the user to wrap up the current interaction (if applicable), clears the eBusiness Center, and sets the user to be available for the next call.

### **Screen Pop and Warm Transfer Enhancements**

A new screen pop is available to display all parties across all party types, if the information gathered by the IVR matches more than one record. If the contact on the phone does not match any of the choices presented, then users can manually search for the contact using Universal Search. It is also possible to perform warm transfer of the contact even though the contact record was identified manually.

### **Enhanced Call Wrap Up**

Users performing outbound calling can schedule callbacks in the call wrap-up screen. User can specify the date and time of when the call back is to occur at the customer's request.

Note that Next Call and End Call buttons are also added to the Wrap Up window to facilitate the interaction wrap up process. If the profile *OTS: Interaction-Enable Auto Wrap Up* is set to No, then the user pressing the Next Call and End Call buttons is prompted to wrap up the current interaction. The user is presented with the Wrap Up window and upon clicking OK the original action will continue.

## 1.3.4 Security Enhancements

### Flexible Create Restrictions

In previous releases security around the update of different entities in the application. However the system did not allow configuring the creation process. In this release, TeleSales provides new profile options to control the creation of organizations, persons and contacts. The following new profiles have been added:

- OS: Create Organization Privilege
- OS: Create Person Privilege
- OS: Create Contact Relationship Privilege

The values for these profiles should be set to Yes for a user to be able to create an organization, person, or contact respectively.

There are some exceptions to this rule. If the profile value is Yes, the user will still not be able to do the Create operation if any of the following conditions are satisfied:

- The logged in user has a Sales Admin role, or
- If the create page has been excluded using function security for the logged in user.

The profile *HZ: Change Party Name* determines if the customer name and Tax ID can be updated. It can be set at site, responsibility, and user levels.

### Full Access on Customer Sales Team

The Full Access check box option is added to the Organization Sales Team and Person Sales Team (similar to the Opportunity Sales Team). This option is used to determine whether the user on the Organization or Person Sales Team has view-only or update access on the organization or person.

### Access Restrictions on Addresses

The customer or contact access restrictions are applied to the addresses as well. A user can create or update addresses only if the user has update access to the organization or person.

## 1.3.5 Usage of OTS By Non-Sales Users

Users who do not have a sales role can now use Oracle TeleSales. A non-sales user, upon opening the application, chooses a non-sales role in the Choose Role and

Group window. The non-sales user does not choose a group in the Group field. A Sales team user chooses a sales role and selects his sales group. Non-sales users do not have access to the Leads or Opportunities tab. They can create and update customer records.

## 1.3.6 Opportunity Center

### **Competitor Tracking**

Within an opportunity, users can enter a key competitor for the entire opportunity. This is in addition to, and not related to, the multiple competitors that can be entered for each purchase item. Entering the key competitor automatically defaults the same value to the individual purchase lines. Administrators can choose to make the key competitor mandatory during opportunity creation. A new profile *OS: Competitor Required for Opportunity* has been created to enforce whether the key competitor is required for an opportunity. Accurate competitor tracking will enable the business to track who they are competing with on a per opportunity level.

### **Win/Loss analysis**

In addition to tracking the key competitor for the entire opportunity, it is now possible to track competitors at the individual line level as well. Users can enter this information in the new Win/Loss tab of Opportunity Center. This tab replaced the old Closing tab. The closing information can still be accessed under the action menu drop down. Win/Loss analysis tracks not only which competitor but also the reason for winning or losing a deal.

### **Mass Update**

In Mass Update of Opportunity you can double-click functionality to open the Opportunity Center from the opportunity name or double-click the customer name to open the eBusiness Center.

## 1.3.7 Contract and Install Base

The eBusiness Center now includes two additional tabs, a Contract tab and an Install Base tab. The Contract tab displays a list of contracts for the party displayed in the header and the selected party or account in the View Details For field. Select a contract and click the Details button to open the Oracle Contracts application for more information.

The Install Base tab lists the install base for the party and the selected View Details For. Click the Details button to open the Oracle Install Base application and view

the selected install base item. The previous Install Base tab in the Organization Detail window is removed, and all functionalities are moved to this new Install Base tab in the eBusiness Center.

### 1.3.8 HTML Calendar

The Forms calendar is replaced with the HTML calendar. The navigation path to access the calendar remains the same and no data migration is needed. Users gain additional functionalities that are available with the HTML calendar such as granting access to view and schedule appointments with other team members.

### 1.3.9 Universal Search Additions

The following searches are added to Universal Search:

- For organization expanded search, the following search criteria is added:
  - Organization number: for both basic and advanced search.
  - Account number: for both basic and advanced search.
  - Taxpayer ID: for basic search only.
- For relationship expanded search, the following search criteria is added:
  - Relationship number: for both basic and advanced search.
  - Organization number: for both basic and advanced search.
  - Organization account number: for advanced search only.
- For person expanded search, the following search criteria is added:
  - Person number: for both basic and advanced search.
  - Account number: for basic search only.
  - Taxpayer ID: for basic search only.
  - Person Id Number: for advanced search only.

If you call Universal Search from an application other than Oracle TeleSales, then the application that called for the search displays the information.

### 1.3.10 Collateral Fulfillment Enhancement

A collateral kit is a grouping of electronic collateral items stored in Oracle Marketing Online. In the Collateral tab and in Collateral History a kit is identified

with a Yes in the Kit field. If a collateral item is a kit, then you can click the Review Kit button to view the items included in the kit. The Review Kit button is also available in the Review Order window. When the order is processed all items in the kit are sent.

### 1.3.11 Collateral Changes

Collateral History now shows the customer's e-mail address as well as the physical address.

In the Collateral tab, if you enter a source code you can then see the collateral for that source code in the LOV. If you enter the collateral first, the related source code displays.

A collateral order can now contain collateral from different source codes.

### 1.3.12 Task Enhancements

#### **Task Notes**

Users can view old notes and write new notes about a task that may take a long time to complete. This feature allows the user to track the progression of the task from start to end. When creating a task, if the profile *OTS: Relate Account to Tasks and Notes* is set to Yes, then the account will be added as a Related To.

#### **Task Creation Using Task Template**

In addition to creating tasks using the task tab, users can use pre-defined task templates to create tasks. These templates, defined per business requirements, can be used to create tasks for parties, leads, and opportunities. The templates available for selection will depend on which business object the user is trying to create the task for. Using task templates will ensure quick and consistent information is captured for each task.

### 1.3.13 Oracle Email Center Integration

An agent can click the e-mail address in the eBusiness Center, Opportunity Center, or Lead Center to send open an e-mail message addressed to the customer. When the e-mail is sent it is recorded as an interaction.

### 1.3.14 Search by Account in the eBusiness Center

You can search for a party using the Account field in the header of the eBusiness Center. It contains a list of values (LOV) that lists all accounts and all roles relating to each account.

#### **Organization**

When the selected party type is Organization, then the listed accounts show all accounts owned by a party of type Organization and all parties of type Organization that have a role in an account. When a value is selected in the LOV, the role party (Organization) is queried in eBusiness Center. If the selected value is for the account owner, then the party (Organization) that owns the account is queried.

#### **Person**

When the selected party type is Person, the account LOV shows all accounts owned by a party of type Person and all parties of type Person that have a role in an account. When a value is selected in the LOV, the role party (Person) is queried in eBusiness Center. If the selected value is for the account owner, the party (Person) who owns the account is queried.

#### **Relationship**

When the selected party type is Relationship, the account LOV shows all accounts owned by a party of type Organization and all parties of type Person that have a role in an account owned by a party of type Organization. Selecting a value in the LOV queries the Organization that owns the account and the Person in the role. If the selected value is for the account owner, only the Organization is queried.

### 1.3.15 Relationship Plan

The relationship plan module is designed to enable organizations to automate their customer service practices and to provide proactive and consistent care for all their customers. Customers can execute different plans for different types of customers to uniquely target customer. Relationship plans are an event-driven model that associates a qualifying customer record with real-time processes such as screen-pop alerts, a fired off script, or a launched workflow.

The following plans are available for Oracle TeleSales:

- **Expiring Quotes:** Displays an alert when querying a customer who has one or more contracts that will expire in the next 30 days.

- **Expiring Opportunities:** Displays an alert when querying a customer who has one or more opportunities that will close in the next 30 days.
- **Contact Restriction - Telephone:** Displays an alert when querying a customer who has a contact restriction of not being contacted via the telephone.

### 1.3.16 Obsolete in This Release

This section covers what is now obsolete in Oracle TeleSales.

#### **Install Base**

The Install Base tab in the Organization Detail window is removed, and all functionalities are now in the Install Base tab in the eBusiness Center.

#### **Party Interest**

The Personal Interest tab in Person Details is replaced with the Party Interest tab, now also available from Organization Details..

#### **Calendar**

The Forms calendar opened by clicking the icon on the toolbar in the eBusiness Center is replaced with the HTML calendar.

#### **Outcome, Reason Assignment**

The Forms based administration windows for creating outcome, result, and reason is obsoleted. New HTML screens are available using the web responsibility of Interaction History JSP Administration.

#### **Profile Options**

The following profiles in Oracle TeleSales are obsolete:

- OTS: Advanced Inbound Installation
- OTS: Advanced Outbound Installation
- OTS: Amount Scaling Factor
- OTS: ANI with No Area Code
- OTS: Create Order for Event
- OTS: No Media Item Interaction
- OTS: Notes Interaction Activity

- OTS: Queue Order: Forecasts
- The profile option OTS: Default User Role and Sales Group is obsolete. It is replaced by two profile options: *OTS: Default User Role* and *OTS: Default User Sales Group*.
- OTS: Default Task Status. Replaced with two profile options: OTS: Task Manager: Default Assignee Status and OTS: Task Manager: Default Task Status.

## 1.4 Oracle Field Sales/Wireless Overview

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

## 1.5 Architecture and Technology

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

- [Section 1.5.1, "Architectural Overview" on page 1-22](#)

### 1.5.1 Architectural Overview

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

<b>Technology</b>	<b>Product</b>
Oracle Forms Designer, version 6.0.8.10.3	OSO
Oracle 8 Enterprise Edition Release, version 8.1.6	OSO
Oracle Reports Designer, version 6.0.8.8.3	OSO
Oracle WebDB, version 2.2.2.1	OSO
Apache version, version 1.3.19	OSO, OTS
Java Developer Kit Server Side, version 1.2	OSO

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<b>Technology</b>	<b>Product</b>
Jdeveloper - BC4J version 3.2.3.102	OSO
Dataserver (EE + InterMedia all options + Spatial), version 8.1.7.3	OTS
WorkFlow, version 2.6	OTS
InterMedia, version 8.1.7.2	OTS
Forms, version 6.0.8.18 (Patch 9)	OTS
EWT, version 3.4	OTS
Oracle JSP, version 1.1.3.0.0	OTS
JInitiator, version 1.1.8.16	OTS
MS Internet Explorer, version 5.5 or later This is the recommended browser for all HTML-based applications.	OSO, OTS
Netscape Navigator, version 4.5 or above	OSO, OTS



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## Before You Begin

This chapter provides information about the mandatory and conditional dependencies for the Oracle E-Business Suite products. The products covered are: Oracle Sales Online (OSO), Oracle TeleSales (OTS), and Oracle Field Sales/Wireless.

- [Section 2.1, "Related Documentation" on page 2-1](#)
- [Section 2.2, "Installation Verification" on page 2-2](#)
- [Section 2.4, "Dependencies" on page 2-21](#)
- [Section 2.4.1, "Mandatory Dependencies" on page 2-21](#)
- [Section 2.4.2, "Conditional Dependencies" on page 2-22](#)

### 2.1 Related Documentation

Following are additional documents relating to the modules discussed in this guide or referred to in implementation tasks.

- *Oracle Sales Online User Guide*
- *Oracle TeleSales User Guide*
- *Oracle Field Sales/Palm Devices User Guide*
- *Oracle Field Sales/Laptop User Guide*
- *Oracle CRM Application Foundation Implementation Guide*
- *Oracle CRM Application Foundation User Guide*
- *Oracle Applications System Administrator's Guide*
- *Using Oracle HRMS -- The Fundamentals*
- *Managing People Using Oracle HRMS Release 11i*

- *Multiple Organizations in Oracle Applications*
- *Oracle General Ledger User Guide*
- *Oracle Receivables User Guide*
- *Oracle Inventory User's Guide*
- *Oracle Quoting - Forms Implementation Guide*
- *Oracle HTML Quoting Implementation Guide*
- *Oracle Applications Flexfields Guide .*
- *Installing Oracle Applications*
- *Oracle Marketing Encyclopedia System Concepts and Procedures*
- *Oracle Incentive Compensation Implementation Guide*
- *Oracle Universal Work Queue Implementation Guide*
- *Oracle Marketing Online User Guide*
- *Oracle Scripting Implementation Guide*
- *Oracle Scripting User Guide*
- *Oracle Predictive User Guide*
- *Oracle Telephony Manager Implementation Guide*
- *Oracle CRM Gateway for Mobile Devices Implementation Guide*
- *Oracle 9i Application Server Documentation, Release 1*

## 2.2 Installation Verification

Before attempting to run CRM applications, first verify that you can perform the tasks outlined in the following table. The listed tasks are generic tasks that are typical of all users of the Oracle E-Business Suite. Depending on your business processes, and the modules that you are installing, not every listed task is applicable to your installation.

The following table describes the non-CRM application module tasks that need to be performed, and which CRM modules require the completion of the task before implementation.

**Table 2–1 Application Dependency Checklist**

<b>Application</b>	<b>Task</b>	<b>CRM Module</b>
Application Object Library	<ol style="list-style-type: none"> <li>1. <a href="#">Creating an FND User</a></li> <li>2. <a href="#">Assigning AOL Responsibilities to the User</a></li> <li>3. <a href="#">Setting User Application, Responsibility, or Site Level Profile Options</a></li> </ol>	<ul style="list-style-type: none"> <li>■ Resource Manager</li> <li>■ Territory Manager</li> <li>■ Task</li> <li>■ HTML Calendar</li> <li>■ Forms-based Calendar</li> <li>■ Notes</li> <li>■ Business Rule Monitor</li> <li>■ Escalation Manager</li> <li>■ Assignment Manager</li> </ul>
Oracle Human Resources	<a href="#">Creating an Employee</a>	<ul style="list-style-type: none"> <li>■ Resource Manager</li> <li>■ Task Manager</li> <li>■ Business Rule Monitor</li> <li>■ Escalation Manager</li> </ul>
Oracle Human Resources	<a href="#">Creating a New Business Unit</a>	Resource Manager
Oracle Receivables	<ol style="list-style-type: none"> <li>1. <a href="#">Creating a Customer</a></li> <li>2. <a href="#">Creating a New Organization</a></li> </ol>	Resource Manager
Oracle Workflow	<a href="#">Creating a Workflow With Notifications</a>	<ul style="list-style-type: none"> <li>■ Resource Manager</li> <li>■ Task Manager</li> <li>■ HTML Calendar</li> <li>■ Notes</li> <li>■ Business Rule Monitor</li> <li>■ Escalation Manager</li> </ul>
Oracle Inventory	<ol style="list-style-type: none"> <li>1. <a href="#">Defining Categories</a></li> <li>2. <a href="#">Defining Products and Platforms</a></li> <li>3. <a href="#">Defining Unit of Measure Classes</a></li> <li>4. <a href="#">Defining Units of Measure</a></li> </ol>	<ul style="list-style-type: none"> <li>■ Resource Manager</li> <li>■ Task Manager</li> <li>■ Assignment Manager</li> </ul>
Oracle Purchasing	<a href="#">Creating a Supplier Contact</a>	Resource Manager

**Table 2–1 Application Dependency Checklist**

<b>Application</b>	<b>Task</b>	<b>CRM Module</b>
Oracle Order Management	<a href="#">Defining Sales Credit Types</a>	Resource Manager
Oracle General Ledger	<a href="#">Setting Up Accounting Flexfields</a>	Resource Manager

## 2.3 Application Procedures

You must be able to complete each of the following non-CRM tasks successfully for your CRM applications to work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

### 2.3.1 Creating an FND User

Perform the following steps to create a FND user in the Application Object Library.

#### **Reference**

*Oracle Applications System Administrator's Guide*, See Chapter 2, Managing Oracle Applications Security

#### **Prerequisites**

None

#### **Responsibility**

System Administrator

#### **Navigation**

Navigate to **Security > User > Define**.

#### **Steps**

1. In the User window, enter a new user name in the User Name field.
2. Enter a password in the Password field.
3. Re-enter the password for verification.
4. Select the employee's name from the list of Values (LOV) in the Person Field.

5. In the Responsibilities sub-tab, select the CRM HTML Administration responsibility from the drop-down list of values.
6. Save the new user.

To verify that the user setup is successful, perform the following steps:

1. Login to your Personal Home Page as the newly created user.
2. Enter your new password when prompted.

You should now be able to access the Personal Home Page for this user.

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**Note:** For this user to have access to HTML applications, you must set additional profile options as detailed in the Implementing Oracle CRM Application Foundation manual.

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### 2.3.2 Assigning AOL Responsibilities to the User

A responsibility defines an application user's current privileges while working with Oracle Applications. When an application user signs on, they select a responsibility that grants certain privileges, specifically:

- The functions that the user may access. Functions are determined by the menu assigned to the responsibility.
- The concurrent programs, such as reports, that the user may run.
- The application database accounts to which forms, concurrent programs, and reports connect.

You cannot delete a responsibility because this information helps to provide an audit trail. You can deactivate a user's responsibility at any time by setting the End Date to the current date. If you wish to reactivate the responsibility for the user, change the End Date to a date after the current date, or clear the End Date.

After creating the FND User, perform the following steps to assign the user AOL responsibilities.

#### Reference

*Managing People Using Oracle HRMS (US)*, See Chapter 1, Employee Management

#### Prerequisites

None

## **Responsibility**

System Administrator

## **Navigation**

Navigate to **Security > User > Define**.

## **Steps**

1. With the user information populated in the window, select the Responsibility field in the Responsibilities tab.
2. Select the necessary responsibility from the List of Values (LOV).
3. Define the Effective dates.
4. Save your work.

### **2.3.3 Setting User Application, Responsibility, or Site Level Profile Options**

A user profile is a set of changeable options that affect the way your application looks and behaves. As System Administrator, you control how Oracle Applications operate by setting user profile options to the values you want. You can set user profile options at four different levels: site, application, responsibility, and user.

After creating the FND User, perform the following steps to set profile options.

## **Reference**

*Managing People Using Oracle HRMS (US)*, See Chapter 1, Employee Management

## **Prerequisites**

None

## **Responsibility**

System Administrator

## **Navigation**

Navigate to **Security > Profile > System**.

## **Steps**

1. In the Find System Profile Values window, Enter the profile option you want to set and click **Find**.

The System Profile Values window opens with the profile option you searched for.

2. Set at least one of the following:

a. Set the Site value.

This field displays the current value, if set, for all users at the installation site.

b. Set the Application value.

This field displays the current value, if set, for all users working under responsibilities owned by the application identified in the Find Profile Values block.

c. Set the Responsibility value.

This field displays the current value, if set, for all users working under the responsibility identified in the Find Profile Values block.

d. Set the User value.

This field displays the current value, if set, for the application user identified in the Find Profile Values block.

You should set site-level default values for any required options after installation of an application. If you do not assign a particular profile option at any of the four levels, that option does not have a default value and may cause errors when you use forms, run reports, or run concurrent requests.

3. Save your work.

## 2.3.4 Creating an Employee

To successfully run most of the CRM products, you must first create employee resources within the ERP Human Resource Management System (HRMS) application. Perform the following steps to define an employee for minimal functionality.

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**Note:** If Oracle HRMS is not installed, then you must enter a new employee using the Enter Person form by navigating to **Resource Manager > Maintain Employee > Employee**.

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## Reference

*Managing People Using Oracle HRMS (US)*, See Chapter 1, Employee Management

## Prerequisites

None

## Responsibility

US HRMS Manager or US Super HRMS Manager

## Navigation

Navigate to **People > Enter and Maintain**.

## Steps

1. Click **New In** in the find window.  
The People window opens.
2. Enter the following employee information in the appropriate form fields:
  - Last Name
  - First Name
  - Title
3. Select the person's gender from the drop-down list.
4. Select Employee from the type drop-down list.
5. Enter the person's social security number.
6. Save you work.

### 2.3.5 Creating a New Business Unit

A Business Group is a special class of organization. Every Business Group can have its own set of default values, with its own internal organizations, grades, jobs, positions, payrolls, employees, applicants, compensations and benefits.

Organizations are the basic work structure of any enterprise. They usually represent the functional, management, or reporting groups which exist within a Business Group. Perform the following steps to create a new business unit.

**Reference**

*Oracle Applications System Administrator's Guide*, See Chapter 2, Managing Oracle Applications Security

**Prerequisites**

None

**Responsibility**

US HRMS Manager or US Super HRMS Manager

**Navigation**

Navigate to **Work Structures > Organization > Description**.

**Steps**

1. Click **New** in the Find Organization window.
2. Enter the name for the Organization
3. Select Business Unit from the list of values (LOV) in the Type field.  
The current date populates the From Date field.
4. Enter the Organization location details from the LOV.
5. Save your work.
6. In the Organization Classification region, select the classification from the LOV.
7. Select the Enabled check box.
8. Save your work.
9. Click **Others** for additional information on the classification you selected.
10. Save your work.

## 2.3.6 Creating a Customer

Perform the following steps to create a new customer, with an address and contact information in the Oracle ERP Accounts Receivables application.

**Reference**

*Oracle Receivables User's Guide*, See Chapter 3, Customers

### **Prerequisites**

None

### **Responsibility**

Receivables Manager

### **Navigation**

Navigate to **Customers > Standard**.

### **Steps**

1. In the Find/Enter Customers window, select Person from the Customer Type drop-down list.
2. Enter the name of the customer in the Name column.
3. Click **Find** to ascertain if the customer already exists.  
As this customer does not exist, the New button is enabled in the Decisions window.
4. Click **New**.  
The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.  
The Customer Addresses window opens.
6. Fill in the necessary information. Yellow fields are mandatory.
7. On the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:
  - Usage: Marketing
  - Location: 6op9
  - Primary: Yes
8. On the Contacts: Telephones tab, enter a new contact and phone number.
9. Save your work.

### **Verify the Information**

To verify that the process worked properly, perform the following steps.

1. Open the Customer-Standard window again.

2. Enter the company name you entered above.
3. Click **Find** to query for the record you created in the Match Results window.
4. If the record is found, click the Contacts: Telephone tab.
5. Place the cursor in the Last Name field
6. From the menu, select **View > Query by Example > Enter**.
7. Enter the contacts last name as the search criteria.
8. Click **View > Query by Example > Run**.

If the record for your contact name populates in the form, then you have successfully created a customer with an address and a contact person for the customer.

### 2.3.7 Creating a New Organization

Perform the following steps to create a new organization, with an address and contact information in the Oracle ERP Accounts Receivables application.

#### Reference

*Oracle Receivables User's Guide*, See Chapter 3, Customers

#### Prerequisites

None

#### Responsibility

Receivables Manager

#### Navigation

Navigate to **Customers > Standards**.

#### Steps

1. In the Find/Enter Customer window, select Organization from the Customer Type drop-down list.
2. Enter the name of a test corporation in the Name field.
3. Click **Find** to ascertain if the customer already exists.  
As this customer does not exist, the New button is enabled.

4. **Click New.**  
The Customer-Standard window opens.
5. **On the Address tab, click New to create a new address.**  
The Customer Addresses window opens displaying the same business purpose table as on the first tab.
6. **Fill in the necessary information. Yellow fields are mandatory.**
7. **On the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:**
  - Usage: Marketing
  - Location: 6op9
  - Primary: Yes
8. **On the Contacts: Telephones sub-tab, enter a new contact and phone number.**
9. **Save your work.**

## 2.3.8 Creating a Workflow With Notifications

Perform the following steps to create and run a workflow with notifications.

### Reference

*Oracle Workflow Guide 2.5*, See Chapter 3, Defining a Workflow Process and Chapter 4, Defining Workflow Process Components

### Prerequisites

None

### Responsibility

Workflow Administrator

### Navigation

Navigate to **Workflow >Launch Processes**.

## Steps

1. In the Launch Processes window, In the Item Type column, click **Document Management**. If you have renamed the item types, this option appears in the Internal Name column as WFDM.

The Initiate Workflow-WFDM page opens.

2. Enter values in the following fields:
  - Item Key: Enter your name plus a sequence number (for example, jdoe1001)
  - User Key: You may copy the value in the Item Key field
  - Process Name: Enter Document Review
  - Process Owner: Your logged in user name populates automatically
  - Send Document: Leave blank
  - Document Owner: Select a valid resource name
  - Document Reviewer: Choose one from the list of values
  - Comments: Enter Workflow Verification
  - Response Document: Leave blank
3. Click **OK**.

The Activities List page opens to show workflow statuses. The status of the workflow you just initiated should be Active.

4. If the status of the workflow is Error, click **Exception** in the Result column to see an explanation of the error.
5. Click **View Diagram** to see a graphical representation of the workflow process.  
Leave the View Diagram window open as you continue to check the workflow.
6. Save your work.

## To Review the Progress of a Workflow

Use the following procedure to verify that the Workflow notification is sent.

## Steps

1. Login to your Personal Home Page.
2. In the list of Self Service Apps, choose the Workflow User Web Application responsibility.

3. In the Navigator, choose **Workflow >Find Notifications**.  
The Find Notifications page opens.
4. In the Type field, enter Document Management. In the To field, enter the document reviewer.
5. Click **Find**.  
The Worklist window opens.
6. Click **Subject** to open the notification.  
If you see the notification, then workflow is set up correctly.
7. Click **Approve** to return to the Worklist window.

### Further Verification

You may go back to the View Diagram window that you opened earlier. Click **Reload** in the browser window to refresh the contents of the window. After the workflow process completes successfully, you can see a green line from the Start icon to the End (Approve) icon.

## 2.3.9 Defining Categories

You can use categories and category sets to group items for various reports and programs. Perform the following steps to define categories.

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**Note:** Category sets may be used as a means to develop custom lists of items on which to report and sort. You can also create other category sets such as John's Priority or Jane's Priority, with categories like high, medium, and low.

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### Reference

*Oracle Inventory User's Guide*, See Chapter 4, Item Setup and Control

### Prerequisites

The categories you assign to a category set must have the same flexfield structure as the set itself. This is true even if you choose not to validate the category list.

### Responsibility

Inventory

## Navigation

Navigate to **Setup > Items > Categories > Category Sets**.

## Steps

1. Select the appropriate organization name in the Organization window, if necessary.
2. In the Category Sets window, enter a unique category set name and description information.
3. Enter a flexfield structure.
4. Select a control level.
  - Master Level: Item assigned to this category set has the same category value in all organizations where it is assigned.
  - Org Level: Item assigned to this category set may have a different category value in each organization where it is assigned.
5. Select a default category.

This is the default category used when assigning an item to the category set. For example, a category set may have a default category called New. After an item is assigned to New, you can override the default category and choose another relevant category for each item.

6. Decide whether or not an item can be assigned to multiple categories within this category set.
  - Enable: You can assign an item to multiple categories within a category set. For example, you may define a Hazard category set. In this case, an item may be assigned to both the Poison and Corrosive categories.
  - Not Enable: You can assign an item to exactly one category. For example, you may define a Web Display category set. In this case, an item can be assigned to only one default display category.
7. Decide whether or not to enforce the list of valid categories.
  - Enable: You can assign an item only to those categories defined as valid categories for this category set. For Oracle Purchasing, this check box is not applicable, and you can assign items only to categories defined as valid for this category set.
  - Not Enable: You can assign an item to any defined category that uses the same flexfield structure as this category set.

8. Select a list of valid categories.

The list of values here includes only categories that use the same flexfield structure as the category set you are defining.

9. Save your work.

### 2.3.10 Defining Products and Platforms

You define and rate products and platforms in Oracle Inventory in order to set resource skill levels in the HTML Resource Manager. See the *Oracle Inventory User's Guide*, See Chapter 5, Items for more information on how to define products and platforms.

#### Reference

*Oracle Inventory User's Guide*, See Chapter 5, Items

### 2.3.11 Defining Unit of Measure Classes

Perform the following steps to define a unit of measure class.

#### Reference

*Oracle Inventory User's Guide*, See Chapter 3 Units of Measure

#### Prerequisites

None

#### Responsibility

Inventory

#### Navigation

Navigate to **Setup > Units of Measure > Classes**.

#### Steps

1. In the Units of Measure Classes window, select **File > New**.
2. Enter a unique name for the unit of measure class.
3. Enter a description for the UOM class.
4. Define the base unit of measure for this class.

5. Enter a unique abbreviation for the unit of measure with a maximum length of three characters. Examples include, EA for each or HRS for hours.
6. Select the "inactive on" date from the date picker.
7. Save your work.

## 2.3.12 Defining Units of Measure

Units of measure are used by a variety of functions and transactions to express the quantity of items. The values defined in the Units of Measure window provide the list of values available in unit of measure fields in other windows. Units of measure are not organization-specific. Perform the following steps to define units of measure.

### Reference

*Oracle Inventory User's Guide*, See Chapter 3 Units of Measure

### Prerequisites

At least one unit of measure class must exist.

### Responsibility

Inventory

### Navigation

Navigate to **Setup > Units of Measure > Units of Measure**.

### Steps

1. With the Units of Measure window open, select **File > New**.
2. Enter a unique name for the unit of measure.
3. Enter a unique abbreviation for the unit of measure with a maximum length of three characters. Examples include, EA for each or HRS for hours.
4. Enter a Description for the UOM.
5. Select the check box if this is the base unit of measure for the unit of measure class.
6. Enter a unit of measure class.
7. Select an "inactive on" date from the date picker.

8. Save your work.

### 2.3.13 Creating a Supplier Contact

Set up suppliers in the Suppliers window to record information about individuals and organizations from whom you purchase goods and services. You can also enter employees whom you reimburse for expense reports. When you enter a supplier that does business from multiple locations, you store supplier information only once, and enter supplier sites for each location. You can designate supplier sites as pay sites, purchasing sites, RFQ only sites, or procurement card sites. For example, for a single supplier, you can buy from several different sites and send payments to several different sites. Most supplier information automatically defaults to all supplier sites to facilitate supplier site entry. However, you can override these defaults and have unique information for each site.

The system uses information you enter for suppliers and supplier sites to enter default values when you later enter transactions for a supplier site. Most information you enter in the Suppliers window is used only to enter defaults in the Supplier Sites window. When the system enters that information in a later transaction, it only uses supplier site information as a default, even if the supplier site value is null and the supplier has a value. If you update information at the supplier level, existing supplier sites are not updated.

When you enter a supplier, you can also record information for your own reference, such as names of contacts or the customer number your supplier has assigned to you. Perform the following steps to create a supplier contact.

#### Reference

*Oracle Public Sector Purchasing User's Guide*, Chapter 5, Supply Base Management

#### Prerequisites

- Verify that the supplier does not exist in the system. Use the Suppliers Report and Supplier Audit Report.
- Define the following lookups in the Oracle Purchasing Lookups window: Pay Group, Supplier Type, Minority Group.
- Define Supplier Types in the Oracle Payables Lookups window.
- If you have installed Purchasing, complete Purchasing setup.
- If you use Oracle Purchasing, define Supplier Types in the Oracle Payables Lookups window.

- If you use Oracle Purchasing, define FOB codes, Minority Groups, and Freight Terms codes in the Oracle Purchasing Lookups window.
- If you use Oracle Purchasing, define Ship Via codes in the Defining Freight Carriers window.

## **Responsibility**

Purchasing

## **Navigation**

Navigate to **Supply Base > Suppliers**.

## **Steps**

1. In the Suppliers window, enter a unique Supplier Name.
2. If the Supplier Number Entry option in the Financials Options window is set to Automatic, Payables automatically enters a Supplier Number for you. If this option is set to Manual, you must enter a unique Supplier Number.
3. (Optional) Enter the supplier's tax identification number in the Taxpayer ID field; for example, an individual's social security number, or a corporation or partnership's federal identification number/federal tax ID.
4. (Optional) Enter the value-added tax (VAT) registration number in the Tax Registration Number field if you are entering a VAT supplier.

If you want to prevent invoice or purchase order entry for this supplier after a certain date, then enter the date in the Inactive On field.

5. Enter supplier information in the appropriate tabs of the Suppliers window.
6. In the Suppliers window, choose the Sites button to navigate to the Supplier Sites window. Enter at least one supplier site name and address.
7. Save your work.

## **2.3.14 Defining Sales Credit Types**

Order Management uses sales credit types to determine if the sales credit for an order is a quota or non-quota amount. Perform the following steps to define sales credit types.

### **Reference**

*Oracle Order Management User's Guide*, See Chapter 1, Setting up

### **Prerequisites**

None

### **Responsibility**

Order Management Super User

### **Navigation**

Navigate to **Setup > Sales > Credit Types**.

### **Steps**

1. Navigate to the Sales Credit Types window.
2. In the Sales Credit Type window, enter the Credit Type Name and Description for the credit type.
3. Select the Quota check box if the sales credit type applies to revenue quota sales credit that you assign to salespeople.
4. Select the Enabled check box to activate the sales credit type.
5. Save your work.

## **2.3.15 Setting Up Accounting Flexfields**

Use descriptive flexfields to tailor General Ledger to fit your unique information needs. For example, you may want to collect additional information on budget organizations, such as the manager and the size of the organization. You can even define context-sensitive flexfields that prompt you for additional information based on your previous entries. Perform the following steps to set up accounting flexfields.

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**Note:** You only need to set up accounting flexfields if you are using the Freight, Revenue, or Receivables Account fields, in the Resource Manager Receivables tab.

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### **Reference**

*Oracle General Ledger User's Guide*, Chapter 9, Setup

**Prerequisites**

Use the Value Sets window to define any value sets you need.

**Responsibility**

General Ledger Super User

**Navigation**

Navigate to **Setup > Financials > Flexfields > Descriptive > Segments**.

**Steps**

Consult the following manuals for more information:

- *Oracle General Ledger User Guide*
- *Oracle Applications Flexfields Guide*

## 2.4 Dependencies

### 2.4.1 Mandatory Dependencies

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

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

<b>Application or Module</b>	<b>Dependent Applications</b>
Core Sales	OSO, OTS
CRM Foundation Resource Manager	OSO, OTS
General Ledger	OSO, OTS

<b>Application or Module</b>	<b>Dependent Applications</b>
HRMS	OSO, OTS
Trading Community Architecture	OSO, OTS

## 2.4.2 Conditional Dependencies

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

<b>Application or Module</b>	<b>Application(s) with Integration Points</b>
Accounts Receivable	OSO, OTS
Bill of Materials	OSO, OTS
Collections	OSO, OTS
Configurator	OSO, OTS
Contracts	OTS
CRM Foundation Fulfillment	OSO, OTS
CRM Foundation Notes	OSO, OTS
CRM Foundation Task Manager	OSO, OTS
CRM Foundation Territory Manager	OSO, OTS
Install Base	OTS
Interaction Center	OSO, OTS
Interaction History	OSO, OTS
Inventory	OSO, OTS
iStore	OSO
Marketing Encyclopedia	OSO, OTS
Oracle Marketing Online	OSO, OTS
Order Capture	OSO, OTS
Order Management	OSO, OTS
Partner Relationship Management	OSO, OTS

<b>Application or Module</b>	<b>Application(s) with Integration Points</b>
Sales Compensation	OSO, OTS
TeleService	OSO, OTS
Universal Work Queue	OTS



# Part II

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## Implementing Oracle Sales Applications

This section contains the following chapters:

- [Chapter 3, "Implementation Overview"](#)
- [Chapter 4, "Implementing Oracle Sales Applications"](#)
- [Chapter 5, "Implementation Tasks for Oracle TeleSales"](#)
- [Chapter 6, "Implementation Tasks for Oracle Field Sales/Wireless"](#)



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# Implementation Overview

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

- Implementation Task Sequence Overview (See [Section 3.1 on page 3-1](#))
- Implementation Task Sequence for Sales Online (See [Section 3.1.1 on page 3-1.](#))
- Implementation Task Sequence for TeleSales (See [Section 3.1.2 on page 3-4.](#))
- Implementation Task Sequence for Field Sales/Wireless (See [Section 3.1.3 on page 3-7.](#))

## 3.1 Implementation Task Sequence Overview

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

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

### 3.1.1 Implementation Task Sequence for Sales Online

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

The following table lists the implementation steps.

Mandatory	Description
Yes	Create organization and locations (See <a href="#">Section 4.1 on page 4-2.</a> )
Yes	Set up customer model (See <a href="#">Section 4.2 on page 4-3.</a> )
Yes	Set up global address formatting and address validation (See <a href="#">Section 4.5 on page 4-21.</a> )
Yes	Create employees (See <a href="#">Section 4.6 on page 4-24.</a> )
Yes	Set up users, security, and reporting hierarchy (See <a href="#">Section 4.7 on page 4-25.</a> ) Define resource groups (See <a href="#">Section 4.7.3 on page 4-40.</a> ) Set up employees as users (See <a href="#">Section 4.7.4 on page 4-42.</a> ) Import employees and assign roles and resource groups (See <a href="#">Section 4.7.5 on page 4-43.</a> ) Set up system profile options (See <a href="#">Section 4.7.6 on page 4-45.</a> ) Set up default user role and sales group (See <a href="#">Section 4.7.7 on page 4-49.</a> ) Create a custom responsibility (optional) (See <a href="#">Section 4.7.8 on page 4-49.</a> )
No	Set up contact list management (See <a href="#">Section 4.8 on page 4-50</a> )
Yes	Set up lead management (See <a href="#">Section 4.9 on page 4-56.</a> ) Set up lead status (See <a href="#">Section 4.9.2 on page 4-57.</a> ) Set up automatic lead assignment (See <a href="#">Section 4.9.3 on page 4-59.</a> ) Set up lead rules engine (See <a href="#">Section 4.9.4 on page 4-63</a> ) Set up qualification rules (See <a href="#">Section 4.9.5 on page 4-65.</a> ) Set up rating rules (See <a href="#">Section 4.9.6 on page 4-67</a> ) Set up channel selection rules (See <a href="#">Section 4.9.7 on page 4-70</a> ) Set up profiles (See <a href="#">Section 4.9.8 on page 4-72.</a> )
No	Import leads (See <a href="#">Section 4.10 on page 4-89.</a> )

<b>Mandatory</b>	<b>Description</b>
Yes	Set up opportunities and forecasting (See <a href="#">Section 4.11 on page 4-144.</a> )
Yes	Create win probabilities (See <a href="#">Section 4.11.2 on page 4-149.</a> )
Yes	Define or modify sales stages (See <a href="#">Section 4.11.3 on page 4-150.</a> )
No	Set up sales methodology (See <a href="#">Section 4.11.4 on page 4-151.</a> )
No	Set up the calendar (See <a href="#">Section 4.11.5 on page 4-153.</a> )
Yes	Define credit types in Order Management (See <a href="#">Section 4.11.6 on page 4-154.</a> )
Yes	Set up opportunity status (See <a href="#">Section 4.11.7 on page 4-154.</a> )
Yes	Set up interest types (See <a href="#">Section 4.11.8 on page 4-156.</a> )
Yes	Setting up interest codes (See <a href="#">Section 4.11.9 on page 4-157.</a> )
No	Set up plan element mapping (See <a href="#">Section 4.11.10 on page 4-158.</a> )
No	Load inventory categories (See <a href="#">Section 4.11.11 on page 4-160.</a> )
Yes	Set up forecast categories (See <a href="#">Section 4.11.12 on page 4-161.</a> )
Yes	Set up forecast category mapping (See <a href="#">Section 4.11.13 on page 4-161.</a> )
No	Set up budget/revenue (See <a href="#">Section 4.11.14 on page 4-162.</a> )
Yes	Set up multiple currencies (See <a href="#">Section 4.12 on page 4-165.</a> )
Yes	Set up currency codes (See <a href="#">Section 4.12.1 on page 4-166.</a> )
Yes	Set up calendar types (See <a href="#">Section 4.12.2 on page 4-167.</a> )
Yes	Set up accounting calendar (See <a href="#">Section 4.12.3 on page 4-168.</a> )
Yes	Set up the default currency and selecting the calendar (See <a href="#">Section 4.12.4 on page 4-169.</a> )
Yes	Set up type mapping (See <a href="#">Section 4.12.6 on page 4-170.</a> )
Yes	Set the profile options for multiple currencies (See <a href="#">Section 4.12.7 on page 4-171.</a> )
	Set up reporting currency mapping (See <a href="#">Section 4.12.8 on page 4-171.</a> )
Yes	Enter GL daily conversion rates (See <a href="#">Section 4.12.9 on page 4-172.</a> ) Only if more than one currency is used.
Yes	Enter currency conversion dates for periods (See <a href="#">Section 4.12.11 on page 4-174.</a> ) Only if more than one currency is used.
Yes	Define conversion rates for periods (See <a href="#">Section 4.12.11.1 on page 4-175.</a> )
Yes	Run concurrent programs (See <a href="#">Section 4.12.12 on page 4-176.</a> )
No	Set up quoting (See <a href="#">Section 4.13 on page 4-177.</a> )
	Set up flexfields (See <a href="#">Section 4.14 on page 4-179.</a> )
No	Set up the home page (See <a href="#">Section 4.15 on page 4-180.</a> )

<b>Mandatory</b>	<b>Description</b>
No	Set up menu administration (See <a href="#">Section 4.18 on page 4-192.</a> )
No	Set up CRM Foundation Modules (See <a href="#">Section 4.19 on page 4-195.</a> ) Set up notes (See <a href="#">Section 4.19.1 on page 4-196.</a> ) Set up interaction tracking (See <a href="#">Section 4.19.2 on page 4-196.</a> ) Set up tasks (See <a href="#">Section 4.19.3 on page 4-196.</a> ) Set up calendar (See <a href="#">Section 4.19.4 on page 4-197.</a> ) Set up fulfillment (See <a href="#">Section 4.19.5 on page 4-197.</a> )
No	Set up territories (See <a href="#">Section 4.20 on page 4-197.</a> ) Set up and use territory assignment program (See <a href="#">Section 4.20.1 on page 4-199</a> )
No	Create custom JSP pages
No	Set up Partners Online (See <a href="#">Section 4.24 on page 4-232.</a> )
No	Set up marketing source codes (See <a href="#">Section 4.25 on page 4-232.</a> )
No	Set up Marketing Encyclopedia System (See <a href="#">Section 4.26 on page 4-233.</a> )
No	Set up Incentive Compensation (See <a href="#">Section 4.27 on page 4-234.</a> )
No	Set up Wireless (See <a href="#">Section D.1 on page 3-1</a> )

### 3.1.2 Implementation Task Sequence for Oracle TeleSales

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

<b>Mandatory</b>	<b>Description</b>
Yes	Create organization and locations (See <a href="#">Section 4.1 on page 4-2.</a> )
Yes	Set up customer model (See <a href="#">Section 4.2 on page 4-3.</a> )
Yes	Set up classifications for customers (See <a href="#">Section 4.3 on page 4-3.</a> )
Yes	Set up relationships for parties in the database. At minimum, you must make sure that the Create Party flag is set to Y for all of the relationships you use. (See <a href="#">Section 4.4 on page 4-11.</a> )
Yes	Set up global address formatting and address validation (See <a href="#">Section 4.5 on page 4-21.</a> )
Yes	Create employees (See <a href="#">Section 4.6 on page 4-24.</a> )

Mandatory	Description
Yes	Set up users, security, and reporting hierarchy (See <a href="#">Section 4.7 on page 4-25.</a> ) Define resource groups (See <a href="#">Section 4.7.3 on page 4-40.</a> ) Set up employees as users (See <a href="#">Section 4.7.4 on page 4-42.</a> ) Import employees and assign roles and resource groups (See <a href="#">Section 4.7.5 on page 4-43.</a> ) Set up system profile options (See <a href="#">Section 4.7.6 on page 4-45.</a> ) Set up default user role and sales group (See <a href="#">Section 4.7.7 on page 4-49.</a> ) Create a custom responsibility (See <a href="#">Section 4.7.8 on page 4-49.</a> )
Yes	Set up lead management (See <a href="#">Section 4.9 on page 4-56.</a> ) Set up lead status (See <a href="#">Section 4.9.2 on page 4-57.</a> ) Set up automatic lead assignment (See <a href="#">Section 4.9.3 on page 4-59.</a> ) Set up lead rules engine (See <a href="#">Section 4.9.4 on page 4-63.</a> ) Set up qualification rules (See <a href="#">Section 4.9.5 on page 4-65.</a> ) Set up rating rules (See <a href="#">Section 4.9.6 on page 4-67.</a> ) Set up channel selection rules (See <a href="#">Section 4.9.7 on page 4-70.</a> ) Set up profiles (See <a href="#">Section 4.9.8 on page 4-72.</a> )
No	Import leads (See <a href="#">Section 4.10 on page 4-89.</a> )
Yes	Set up opportunities and forecasting (See <a href="#">Section 4.11 on page 4-144.</a> ) Create win probabilities (See <a href="#">Section 4.11.2 on page 4-149.</a> ) Define or modify sales stages (See <a href="#">Section 4.11.3 on page 4-150.</a> ) Set up sales methodology (See <a href="#">Section 4.11.4 on page 4-151.</a> ) Set up the calendar (See <a href="#">Section 4.11.5 on page 4-153.</a> ) Define credit types in Order Management (See <a href="#">Section 4.11.6 on page 4-154.</a> ) Set up opportunity status (See <a href="#">Section 4.11.7 on page 4-154.</a> ) Set up interest types (See <a href="#">Section 4.11.8 on page 4-156.</a> ) Setting up interest codes (See <a href="#">Section 4.11.9 on page 4-157.</a> ) Set up plan element mapping (See <a href="#">Section 4.11.10 on page 4-158.</a> ) Load inventory categories (See <a href="#">Section 4.11.11 on page 4-160.</a> )

Mandatory	Description
No	Set up multiple currencies (See <a href="#">Section 4.12 on page 4-165.</a> ) Set up calendar types (See <a href="#">Section 4.12.2 on page 4-167.</a> ) Set up accounting calendar (See <a href="#">Section 4.12.3 on page 4-168.</a> ) Set up the default currency and selecting the calendar (See <a href="#">Section 4.12.4 on page 4-169.</a> ) Set up type mapping (See <a href="#">Section 4.12.6 on page 4-170.</a> ) Set the profile options for multiple currencies (See <a href="#">Section 4.12.7 on page 4-171.</a> ) Set up reporting currency mapping (See <a href="#">Section 4.12.8 on page 4-171.</a> ) Enter GL daily conversion rates (See <a href="#">Section 4.12.9 on page 4-172.</a> ) Enter currency conversion dates for periods (Pseudo Period Rates.). (See <a href="#">Section 4.12.11 on page 4-174.</a> ) Define conversion rates for periods (See <a href="#">Section 4.12.11.1 on page 4-175.</a> ) Run Concurrent Programs (See <a href="#">Section 4.12.12 on page 4-176.</a> ) Set up forecast category mapping (See <a href="#">Section 4.11.13 on page 4-161.</a> ) Set up budget/revenue (See <a href="#">Section 4.11.14 on page 4-162.</a> )
No	Set up quoting (See <a href="#">Section 4.13 on page 4-177.</a> )
No	Set up flexfields (See <a href="#">Section 4.14 on page 4-179.</a> )
No	Set up CRM Foundation Modules (See <a href="#">Section 4.19 on page 4-195.</a> ) Set up notes (See <a href="#">Section 4.19.1 on page 4-196.</a> ) Set up interaction tracking (See <a href="#">Section 4.19.2 on page 4-196.</a> ) Set up tasks (See <a href="#">Section 4.19.3 on page 4-196.</a> ) Set up calendar (See <a href="#">Section 4.19.4 on page 4-197.</a> ) Set up fulfillment (See <a href="#">Section 4.19.5 on page 4-197.</a> )
No	Set up territories (See <a href="#">Section 4.20 on page 4-197.</a> )
No	Set up Partners Online (See <a href="#">Section 4.24 on page 4-232.</a> )
No	Set up marketing source codes (See <a href="#">Section 4.25 on page 4-232.</a> )
No	Set up the Marketing Encyclopedia System (See <a href="#">Section 4.26 on page 4-233.</a> )
No	Set up Incentive Compensation (See <a href="#">Section 4.27 on page 4-234.</a> )
No	Set up the profile option for Quick Menu (See <a href="#">Section 5.1 on page 5-2.</a> )

<b>Mandatory</b>	<b>Description</b>
No	Customize the interface by setting default tabs and hiding tabs (See <a href="#">Section 5.2 on page 5-2.</a> )
No	Set up custom tabs (See <a href="#">Section 5.3 on page 5-6.</a> )
No	Set up the ability to launch HTML-based applications. (See <a href="#">Section 5.4 on page 5-8.</a> )
No	Set up the ability of agents to view maps for addresses via integration with a mapping application. (See <a href="#">Section 5.5 on page 5-9.</a> )
Yes	Set up the Universal Work Queue (See <a href="#">Section 5.6 on page 5-10.</a> )
No	Set up marketing events using Oracle Marketing Online. (See <a href="#">Section 5.7 on page 5-10.</a> )
No	Set up marketing collateral (See <a href="#">Section 5.8 on page 5-11.</a> )
No	Set up scripting (See <a href="#">Section 5.9 on page 5-14.</a> )
No	Set up call center applications (See <a href="#">Section 5.10 on page 5-15.</a> )
No	Assign marketing source codes to agents. (See <a href="#">Section 5.11 on page 5-15.</a> )
No	Set up eMail Center (See <a href="#">Section 5.12 on page 5-22.</a> )
No	Enable interaction tracking and set up automatic interaction tracking and wrap-up. (See <a href="#">Section 5.13 on page 5-23.</a> )
No	Enable web directory assistance (See <a href="#">Section 5.14 on page 5-31.</a> )
No	Set up the application for non-sales users
No	Set up relationship plan (See <a href="#">Section 5.15 on page 5-37.</a> )
No	Set up address validation (See <a href="#">Section 5.16 on page 5-37.</a> )
No	Set up the dashboard (See <a href="#">Section 5.17 on page 5-38.</a> )

### 3.1.3 Implementation Task Sequence for Field Sales/Wireless

<b>Mandatory</b>	<b>Description</b>
Yes	Install Oracle Sales Online Release 11i and verify that Sales Online and its prerequisite products and dependencies are properly installed. (See <a href="#">Section 3.1.1 on page 3-1.</a> )
Yes	Set Up Field Sales/Wireless User (See <a href="#">Section 6.2 on page 6-2.</a> )

<b>Mandatory</b>	<b>Description</b>
Yes	Set Up Wireless Edition Server (See <a href="#">Section 6.3 on page 6-3.</a> ) Reference: <i>Oracle's 9i Application Server Wireless Edition Installation Guide</i>
No	Create Master Documents for Fulfillment. (See <a href="#">Section 6.4 on page 6-3.</a> ) *This step is only needed if you want to use the Fulfillment features. Reference: <i>Oracle CRM Application Foundation User Guide</i>

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# Implementing Oracle Sales Applications

This chapter explains how to implement the following applications: Oracle Sales Online, Oracle TeleSales, and Oracle Field Sales/Wireless. The procedures are listed in the suggested implementation order. After completing the steps in this chapter, see the following chapters for additional steps:

- [Chapter 5, "Implementation Tasks for Oracle TeleSales"](#)
- [Chapter 6, "Implementation Tasks for Oracle Field Sales/Wireless"](#)

Each step lists the products which require that particular step. If the product you are implementing is not listed, you can skip the step. For a complete checklist of steps for your product, please see checklist of implementation steps in [Chapter 3, "Implementation Overview"](#). Perform the following steps:

- [Section 4.1, "Creating Organizations and Locations in Oracle HRMS"](#)
- [Section 4.2, "Setting Up the Customer Model"](#)
- [Section 4.3, "Setting Up Classifications"](#)
- [Section 4.4, "Setting Up Relationships"](#)
- [Section 4.5, "Setting Up Global Address Formatting and Address Validation"](#)
- [Section 4.6, "Creating Employees"](#)
- [Section 4.7, "Setting Up Users, Security, and Reporting Hierarchy"](#)
- [Section 4.8, "Setting Up Contact List Management"](#)
- [Section 4.8.1, "Creating Custom Filters"](#)
- [Section 4.9, "Setting Up Lead Management"](#)
- [Section 4.10, "Importing Leads"](#)
- [Section 4.11, "Setting Up Opportunities and Forecasting"](#)

- Section 4.12, "Setting Up Multiple Currencies"
- Section 4.13, "Setting Up Quoting"
- Section 4.14, "Setting Up Flexfields"
- Section 4.15, "Setting Up the Home Page"
- Section 4.16, "Running Concurrent Programs for Materialized Views"
- Section 4.17, "Enabling Default Responsibilities"
- Section 4.18, "Setting Up Menu Administration"
- Section 4.19, "Setting Up CRM Foundation Modules"
- Section 4.20, "Setting Up Territories"
- Section 4.20.19, "Troubleshooting"
- Section 4.21, "Creating Custom JSP Pages"
- Section 4.22, "Adding a Custom Report to Report Listings"
- Section 4.23, "Excluding Tabs and Functions"
- Section 4.24, "Setting Up Partners"
- Section 4.25, "Setting Up Marketing Source Codes"
- Section 4.26, "Setting Up Marketing Encyclopedia System"
- Section 4.27, "Setting Up Incentive Compensation"
- Section 4.28, "Adding Competitors to Marketing"

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**Note:** It is recommended that you bounce the Apache server after a change is made in a setup step in order to view the new or changed feature.

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## 4.1 Creating Organizations and Locations in Oracle HRMS

### **Forms Navigation:**

HRMS Setup > Organization

**Applies to: Sales Online, TeleSales**

Organizations and locations are the internal organizations that are part of your company.

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

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

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

## 4.2 Setting Up the Customer Model

**Applies to: Sales Online, TeleSales**

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

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

## 4.3 Setting Up Classifications

**Applies to: Sales Online, TeleSales**

You can use party classification schemes to classify parties or other business entities into various categories. A classification scheme includes a class category and a class code. The class category is a broad subject within which you can classify parties. The class code is a specific value of the category.

For example, if you want to know the industry sector to which a party belongs, you can use a pre-defined class category, such as 'SIC 1987', which includes the 1987

version of standard industrial classification codes. You can also define your class categories for your own purposes. For example, you may define a class category to determine if there is a special business consideration, special pricing arrangement, or special term for a party.

The database already contains a number of classification schemes already set up for you. These are:

- 1987 SIC: The 1987 edition of the U.S. Industrial Classification Codes (SIC).
- 1977 SIC: The 1977 edition of the U.S. Industrial Classification Codes (SIC).
- 1972 SIC: The 1972 edition of the U.S. Industrial Classification Codes (SIC).
- NACE: General Industrial Classification of Economic Activities within the European Community (NACE, Revision 1).

Use this procedure to create classifications of your own. In the user interface, the classification scheme you are creating is called a Class or Classification. The individual values within the classification scheme are called Classification Codes.

### **Prerequisites**

To create your own system of classification for your customers, you must design the system first and have a printout ready before you start this procedure.

The user interface permits you to enter complex hierarchical classifications, but the hierarchy is not displayed. You must know the parent and child relationships of each classification node in the tree before you can input them.

Using this software you build your hierarchy of codes from the top down by adding child nodes. For this reason you may want to name your classification codes in a way that will help you find all of the child nodes for each level. If the code names for classification codes at the same level share the same characters, then you can find and add them as children all at the same time.

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > General > Customer Administration > Classification

## Responsibility

Oracle Sales Online Super User

### Steps

On the Classification page, the Class column lists the classifications already available to you.

#### 6. Click **Create**.

The Create Classification page appears.

**Create Classification**

Create Restore Cancel

\* Class

\* Meaning

Description

Allow Multiple Parents

Allow Leaf Nodes Only

Allow Multiple Assignments

*Owner Table	*Column	Condition
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Previous Next

Create Restore Cancel

7. Enter a name for your classification scheme in Class.

8. Enter a meaning for the classification.

9. Optionally, enter a description.

10. Select one or more check boxes which represent the rules that will govern the relationships between the different nodes in your classification scheme hierarchy. The available rules are:

- Allow Multiple Parents: Selecting this check box means that any node in your hierarchy can have more than one parent. Leaving this check box unselected permits only one parent.

- **Allow Leaf Nodes Only:** Restricts you to assigning only the leaf nodes of any class code hierarchy. This means only those codes that have no children. Leaving this check box unselected means that you can use any class codes for this class category.
  - **Allow Multiple Assignments:** Selecting this check box permits sales application agents or salespeople to classify a customer, an opportunity, or other object using more than one code from the class category you are creating. Leaving this check box unselected restricts agents or salespeople to using only one code.
11. Use the Owner Table drop-down list to select HZ-PARTIES. This is the only table where you can set up classifications. In this release, you can only set up classifications for customers.
  12. Use the Column drop-down list to select PARTY\_ID. This is the only column where you can set up classifications.
  13. Optionally, you can enter an SQL Where condition in the Condition column.
  14. Click **Create**.

The Class Detail page appears. You are now ready to create the classification codes for the classification you have created.

## Class Detail

Class

\* Meaning

Description

Allow Multiple Parents  
 Allow Leaf Nodes Only  
 Allow Multiple Assignments

---

Owner Table

*Owner Table	*Column	Condition
<input type="text" value="HZ_PARTIES"/>	<input type="text" value="PARTY_ID"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### 15. Click **Classification Codes**.

The Classifications page appears.

## Classifications

Class [BANK\\_BRANCH\\_TYPE](#)

### Find Classification Codes

Code

Meaning

Description

### Classification Codes

*Code	*Meaning	Description	Start Date	End Date	Enabled
<a href="#">ABA</a>	American Bankers	American Bankers	07-NOV-2001		<input checked="" type="checkbox"/>
<a href="#">CHIPS</a>	Clearing House Int	Clearing House Int	07-NOV-2001		<input checked="" type="checkbox"/>
<a href="#">OTHER</a>	Other	Other bank branch	07-NOV-2001		<input checked="" type="checkbox"/>
<a href="#">SWIFT</a>	Society for Worldw	Society for Worldw	07-NOV-2001		<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Previous Next

**16.** Enter all of the codes, both the nodes and leaves in the hierarchy, by making entries in the following fields:

- **Code:** This is the name you will use to build your classification hierarchy.
- **Meaning:** This is what the user sees when they use your classification scheme.
- **Description:** An optional description.

**17.** Click **Update**.

The page updates, The codes you entered in the Code column turn into links. You are now ready to create the hierarchy of codes you have entered.

This is done by adding child codes, so you must start at the top of the hierarchy and work your way down.

18. To create a classification hierarchy of the classification codes, then, for each code:
  - a. Click the link in the Code column.

The Classification Detail page appears.

The Parent Code region lists all of the parents of this code. Unless the Allow Multiple Parents check box is selected for this class, you can have only one parent in this list.

The Child Code region lists all codes in the level below this code in the hierarchy.
  - b. In the Add a Class Code field, enter the code name or a partial code name for the code(s) you wish to enter as children. You can use the % sign for any missing letters.
  - c. Click **Go**.

The Select Class Code page appears listing the results of your search. You can keep this page open and use the search at the top to search for additional source codes.
  - d. Select the Select check boxes for any codes you wish to add as children.
  - e. Click **Go**.

The Classification Detail page appears. The Child Code column now lists the child nodes you have selected.
  - f. Enter the required Start Date for each child node. You can use the date button to select the date from the calendar.
  - g. Click **Update**.

You are now ready to add additional child nodes. You can go back to the Select Class Code page to search for additional child codes to add to this node. Or you can click on the link of any of the child nodes on this page to add children to those nodes.
19. Set up the concurrent program "Refresh of Customer Classification Denormalization" to perform a data refresh that will populate the denorm table `as_hz_class_code_denorm`.

Under the following circumstances, you will need to run the concurrent program:

- The first time you install the patch which contains the classification feature. This will populate the denorm table, `as_hz_class_code_denorm`.
  - Every time you enter or update classification related data that is not updated from the Oracle Sales Online Administration tab. For example, if you enter or update data in "AR quick code lookups" forms.
  - Every time you install a TCA or FND patch that has added more seeded data for classifications.
  - If the profile OS: Enable Real Time Denormalization for Customer Classification is set to "No". This means that data entered or updated from the Oracle Sales Online Administration tab is not denormalized in real time.
20. Set the profile OS: Enable Real Time Denormalization for Customer Classification. The default value is "Yes". If the profile is set to Yes, real time denormalization for code relations will be enabled. This means that data entered or updated from the Oracle Sales Online Administration tab will be denormalized into `as_hz_class_code_denorm` in real time. If this profile is set to "No", there is no denormalization performed online.

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---

**Note:** In order to see the changes you have made, you must bounce the middle tier.

---

---

### Restrictions

- Currently, one classification with multiple parents is not supported. In the Classification Category lookup, we only show categories which `ALLOW_MULTI_PARENT_FLAG` is N.
- Classification codes can have parent child relationships with other classification codes in the same classification category. This can create a hierarchical structure with indefinite depth. This could cause a performance problem for search functionality. To ease this problem, we will only allow maximum depth of 4 levels.
- The column `ADDITIONAL_WHERE_CLAUSE` in `HZ_CLASS_CATEGORY_USES` is used to provide restrictions on classification category. The following three restriction are currently supported:
  - `'WHERE PARTY_TYPE='ORGANIZATION'`
  - `'WHERE PARTY_TYPE='PERSON'`
  - `'WHERE PARTY_TYPE='PARTY_RELATIONSHIP'`

- The report will only return code assignment for person, organization, person to organization relationship or person to person relationship. Although the user can assign codes to organization to organization relationship, we do not provide reporting functionality for these code assignments. This is because security is only provided for person, organization, person to person and person to organization relationships.
- For the Task Classification Report, the Party-Task association is based on Source, not References. For example, if the classification filter criteria matches a party, the tasks directly associated with the party (in the JTF\_TASK.SOURCE\_OBJECT\_ID) will be returned. But if there are tasks associated with an opportunity belonging to a party, and the task is related to the party (using References), then such tasks will not be shown in the report.

## 4.4 Setting Up Relationships

### **Applies to: Sales Online, TeleSales**

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

You must make sure each relationship your implementation uses has the Create Party (CREATE\_PARTY) flag set to Y. Follow the steps described in [Table 4.4.5, "Setting Up Relationships for Customers Upgrading from Previous Releases"](#) on page 4-21.

You can also:

- Modify or add to the list of relationships. See [Section 4.4.1, "Modifying Seeded Relationships"](#).
- Specify where these relationships can be used and set up any reciprocal relationships. [Section 4.4.2, "Setting Up Relationship Usage and Reciprocal Relationships"](#).

### **About Relationships in Sales Applications**

Agents or salespeople using any sales product can capture a wide variety of relationships. These include:

- Business relationships between two individuals, such as "reports to".
- Personal relationships between two individuals, such as "parent of" and "child of".

- Relationships between individuals and organizations, such as "employee of" and "manager of".
- Relationships between different organizations, such as "subsidiary of".
- Relationships between outside organizations and your own internal organizations. For example, "competitor of".

Agents or salespeople capture these relationships by making a selection from a list of values. There is no limit to the number of relationships or the combination of relationships that can be captured for any one person or organization.

A relationship consists of:

1. An entry in the Oracle Receivables extensible lookup PARTY\_RELATIONS\_TYPE. The lookup code entered here includes the meaning the user sees in the list of values.
2. Setup for each relationship using the administration user interface as described in [Section 4.4.2, "Setting Up Relationship Usage and Reciprocal Relationships"](#). This setup includes:
  - Specification of where the relationship can be used.
  - Any reciprocal relationship the application is to capture when an user selects the relationship.

### **Relationship Subjects, Objects, and Party Types**

All relationships have a subject and an object. For example, in the relationship "father of", the father is the subject. The child is the object. The subject and the object can be of the same or different party types. In the case of "father of", both parties to the relationship are persons. In case of "member of", the subject is a person and the object is an organization. Because it makes no sense for an user to enter a relationship for the wrong party types, you must specify what party type can be used for both the subject and the object of the relationship. This prevents a user from entering "father of" when they are entering a relationship between two organizations, for example. This setup is required for any new relationship that you create.

### **About Setting Up the Automatic Capture of Reciprocal Relationships**

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

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

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

#### 4.4.1 Modifying Seeded Relationships

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

- Modify the wording of the relationship in the Meaning column. This will change what the user sees in the sales application's user interface.
- Disable any seeded relationship by deselecting the Enabled check box.
- Add relationships of your own. If you add new relationships to this lookup, you must remember to set up their usage according to the procedure described in [Section 4.4.2, "Setting Up Relationship Usage and Reciprocal Relationships"](#). If you do not, they will not be available for use.

Lookups fall into three categories. They are listed below:

- **System (S):** The implementer can only change the wording of a list of values (LOV) choices the user sees on the screen. No deletions or additions are allowed.
- **Extensible (E):** The implementer can change both the wording of the LOV choices and add new choices for the user.
- **User (U):** The implementer can change the lookup completely, deleting and adding LOV choices at will.

The following table lists all of the seeded relationship codes for the lookup PARTY\_RELATIONS\_TYPE with an explanation for each:

Code	Explanation
ADVERTISER	Advertiser
AFFILIATE_TO	Affiliate

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

<b>Code</b>	<b>Explanation</b>
FATHER_OF	Father
FIELD_SERVICE_PROVIDER_FOR	Field Service Provider
GENERAL_EMPLOYEE_OF	General Employee
GLOBAL_ULTIMATE_OF	Global Ultimate of
GUARANTOR_FOR	Guarantor
GUARDIAN_OF	Guardian
HEADQUARTERS_OF	Headquarters of
KEY_DECISION_MAKER_FOR	Key Decision Maker
LEGAL_COUNSEL_FOR	Legal Counsel
MEMBER_OF	Member
MOTHER_OF	Mother
OWNED_BY	Owned
PARENT_OF	Parent
PARTNER_OF	Partner
PARENT_OF	Parent
PAYFROM_OF	The alternate party to pay for a buyer.
PAYTO_OF	The alternate payee name for the seller.
PUBLISHER	Publisher
REPAIR_DEPOT_PROVIDER_FOR	Repair Depot Provider
REPORTS_TO	Reports To
SELLER_FOR	Seller
SELLER_FOR	Seller
SHIPTO_OF	The alternate shipping party for the buyer
SIBLING_OF	Sibling
SISTER_OF	Sister
SON_OF	Son
SPOUSE_OF	Spouse
STOCK HOLDER_OF	Stock Holder

<b>Code</b>	<b>Explanation</b>
STUDENT_OF	Student
SUBSIDIARY_OF	Subsidiary
UNCLE_OF	Uncle
VENDOR_OF	Vendor

For information about viewing and modifying lookups, please refer to the *Oracle Applications System Administrator's Guide*.

## 4.4.2 Setting Up Relationship Usage and Reciprocal Relationships

Use this procedure to:

- Select what party type can be used with relationships you have added to the lookup PARTY\_RELATIONS\_TYPE
- Set up the automatic capture of reciprocal relationships

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > General > Customer Administration > Relationship

### Responsibility

Oracle Sales Online Super User

### Steps

On the Relationships page, the Relationships table lists the current relationships already available to you.

1. Click **Create**.

The Create Relationships page appears.

### 4.4.3 Setting Up Reciprocal Relationships

If you are setting up a reciprocal relationship:

1. Enter the name for the reciprocal relationship in the Relationship field. This name is for implementer use only. It helps you identify the set up you are creating and is not visible to users of sales applications.
2. Select the relationship you wish to set up using the Forward Relationship Code drop-down list.
3. Select the reciprocal relationship using the Backward Relationship Code drop-down list. This is the relationship that is recorded automatically by the application when you select the entry you made in Forward Relationship Code.
4. Using the Subject Name drop-down list, select the party to which this relationship setup applies. For example, for the relationship "Member of," select Person. Valid parties for sales applications are: Person and Organization.
5. Using the Object Name drop-down list, select the party that can be the object of this relationship. For example, for the relationship "Member of," select Organization because people are members of organizations. Valid parties for sales applications are: Person and Organization.
6. Using the Directional Code drop-down list, select either Parent or Child. For this release, it does not matter which of these two values you select.
7. Select the Enabled check box. This is required.
8. Select the Create Party check box. This is required as sales applications create a new party in the database whenever a new relationship is entered.

You have now completed the setup of the first half of a reciprocal relationship. Now you must set up the relationship in the other direction.

9. Click **Create**.

### 4.4.4 Setting Up Non-Reciprocal Relationships

If you are setting up a non-reciprocal relationship:

1. Enter the name of the relationship setup you are creating in the Relationship field. This name is for implementer use only. It helps you identify the setup you are creating. It is not visible to users of sales applications.
2. Select the relationship that you want to setup using the Forward Relationship Code drop-down list.

3. Select the same relationship code for the Backward Relationship as you have selected for the Forward Relationship code.
4. Using the Subject Name drop-down list, select the party to which this relationship setup applies.
5. Using the Object Name drop-down list, select the party that can be the object of this relationship. Valid parties for sales applications are: Person and Organization.
6. Enter Non Directional for the Directional Code.
7. Select the Enabled check box. This is required.
8. Select the Create Party check box. This is required as sales applications create a new party in the database whenever a new relationship is entered.
9. Click **Create**.

### Guidelines

The following table lists all seeded relationships including reciprocal relationships.

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

Each row of the table consists of the following columns:

- **Relationship:** This is the relationship from PARTY\_RELATIONS\_TYPE that is used to capture a relationship between two parties in the database.
- **Reverse Relationship:** This is the relationship that is recorded automatically by the application when the user selects the Relationship field. If this field is blank, then no reciprocal relationship is captured.
- **Subject Type:** This specifies which party type can be the subject of the relationship. This is the first of the two columns that specify the parties that can use the relationship. For example, for the "Member of" relationship, the entry in this column is Person. This means that agents or sales people can only use this relationship for parties of Person. Users recording a relationship for organizations will not see "Member of" in the list of values.
- **Object Type:** This specifies which party type can be the object of the relationship. This is the second of two columns that restrict the use of a relationship. For example, for the "Member of" relationship, the entry in this column is Organization. This means that agents or salespeople can only use this relationship between Persons and Organizations. Users recording a relationship

between two organizations or between two persons will not see "Member of" in the list of values.

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

<b>Relationship</b>	<b>Reverse Relationship</b>	<b>Subject Type</b>	<b>Object Type</b>
Dependent of	Guarantor for	Organization	Organization
Member of	Contains member	Person	Organization
Contains member	Member of	Organization	Person
Member of	Contains member	Person	Group
Contains member	Member of	Group	Person
Member of	Contains member	Organization	Group
Contains member	Member of	Group	Organization
Parent of	Child of	Person	Person
Child of	Parent of	Person	Person
Partner of	Partner of	Organization	Organization
Payfrom of		Organization	Organization
Payto of		Organization	Organization
Repair depot provider for		Organization	Organization
Reports to	Manager of	Person	Person
Manager of	Reports to	Person	Person
Shipto of		Organization	Organization
Sibling of	Sibling of	Person	Person
Spouse of	Spouse of	Person	Person
Stock holder of		Person	Organization
Stock holder of		Organization	Organization
Student of		Person	Organization
Subsidiary of	Parent of	Organization	Organization
Parent of	Subsidiary of	Organization	Organization
VAD of		Organization	Organization
Relative of	Relative of	Person	Person
Domestic partner of	Domestic partner of	Person	Person
Var of		Organization	Organization

## 4.4.5 Setting Up Relationships for Customers Upgrading from Previous Releases

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

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > General > Customer Administration > Relationship

### Responsibility

Oracle Sales Online Super User

### Steps

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

1. For each relationship in the table used by your implementation:
  - a. Select the link for a relationship.  
The Relationship Detail page appears.
  - b. Make sure that the Create Party check box is selected.
  - c. Click **Update**.
2. Bounce your Apache server when you are done.

## 4.5 Setting Up Global Address Formatting and Address Validation

### Applies to: Sales Online, TeleSales

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

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

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

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

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

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

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

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

### **Forms Navigation**

Receivables Manager > Countries

### **Forms Responsibility**

Oracle Sales Administrator

### **Steps**

1. Navigate to the Countries and Territories window.

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

### 4.5.1 Differences Between Oracle Receivables and Sales Setups

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

- Descriptive Flexfield details:  
 DESCRIPTIVE FLEXFIELD NAME: Remit Address HZ  
 Title: Address  
 Application: Oracle Receivables  
 Table: HZ\_LOCATIONS
- Additional profile option for Default Country behavior: OSO: Default Country.
- If there is no address style associated with a country, then sales applications use the setting of OS: Default Address Style as the default address style instead of the standard address format in Oracle Receivables. The seeded default value of this option is AS\_DEFAULT.
- Sales applications include the following additional address style in addition to the address styles provided by Oracle Receivables:

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

The following table lists the columns for the AS\_DEFAULT style.

Table Name	Database Column
HZ_LOCATIONS	ADDRESS1
HZ_LOCATIONS	ADDRESS2
HZ_LOCATIONS	ADDRESS3
HZ_LOCATIONS	ADDRESS4

Table Name	Database Column
HZ_LOCATIONS	STATE
HZ_LOCATIONS	COUNTY
HZ_LOCATIONS	CITY
HZ_LOCATIONS	POSTAL_CODE

- The STATE segment uses the AS\_LOC\_STATE value set for the list of values. The list of values depends on the Sales Tax Location Flexfield setup in Oracle Receivables.
- Additional profile option for Oracle TeleSales: *OTS: Customer-Include Address Style In Concatenated Format*. If set to Yes the address style name (such as US) appears in the Address field in front of the concatenated address. This applies to the eBusiness Center header and the Address/Phone tab.

## 4.6 Creating Employees

### **Applies to: Sales Online, TeleSales, Field Sales**

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

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

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

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

### 4.6.1 With Full Oracle HRMS License

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

#### **Responsibility**

US HRMS Manager

If Oracle HRMS is not installed, use the CRM Resource Manager responsibility to create the employee.

### Navigation

People > Enter and Maintain

### Steps

1. Create an employee using this form. Remember to use Employee as the Category.
2. Click **Save**.
3. Additionally, click the Address button to enter an address.
4. Click **Save**.

## 4.6.2 With Shared Oracle HRMS License

### Forms Navigation

CRM Foundation > Resource Manager > Maintain Employees > Employees

If Oracle HRMS is not installed, use the CRM Resource Manager responsibility to create the employee.

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

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## 4.7 Setting Up Users, Security, and Reporting Hierarchy

### Applies to: Sales Online, TeleSales

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

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

### Steps

1. Replicate the reporting hierarchy within your sales organization using Resource Groups in Resource Manager. This determines how forecasting of opportunity information is aggregated. See [Section 4.7.3, "Defining Resource Groups"](#) on page 4-40.
2. Set up the employees as users of your sales application. [Section 4.7.4, "Setting Up Employees as Users"](#) on page 4-42.
3. Import the employees you have created, give them a role, and assign them to the resource groups you have created. See [Section 4.7.5, "Importing Employees and Assigning Them Roles and Resource Groups"](#) on page 4-43.
4. Set up the system profile options which, in combination with the resource groups and roles, determine what information employees can view and modify. See [Section 4.7.6, "Setting Up System Profile Options to Give Users Access to Information"](#) on page 4-45.
5. For Oracle TeleSales only, you can set up a default user role and sales group for employees with multiple roles and sales groups. This makes it possible for users to use your application without having to select a role and group first. See [Section 4.7.7, "Setting Up Default User Role and Sales Group"](#) on page 4-49.

## 4.7.1 Factors That Affect Security

Access and modification ability are determined by a combination of responsibilities, system profile options, sales territories, sales teams, and the roles and groups you set up in Resource Manager, a module of the CRM E-Business Suite foundation. The Resource Manager setup you do here also determines how opportunities are rolled up for reports and forecasting for other applications in CRM sales family.

Here is a brief overview of the different elements which affect access to information:

- [Responsibilities](#)
- [System Profile Options](#)
- [Customer Sales Teams](#)
- [Opportunity Sales Team](#)
- [Lead Sales Team and Owner Assignment](#)

- [The Territory Manager Module and Automatic Lead Assignment](#)
- [Groups \(Resource Manager\)](#)
- [Roles \(Resource Manager\)](#)

## Responsibilities

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

## System Profile Options

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

## Customer Sales Teams

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

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

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

- Users can control who has access to information on a customer sales team by selecting the "Keep" and "Team Leader" check boxes next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.
- An user on a sales team for an organization gains automatic access to all of the records of any consumer (Person) with a relationship to that organization. Users need not be on the sales teams for both the consumer and the organization. It is sufficient for them to be on the organization sales team to have access to personal information.

- All agents or salespeople on an opportunity sales team have view access, but to allow them to make changes the opportunity creator must select the Full Access check box next their names. Members with an unselected check box have read-only access.

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

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- Setting OS: Customer Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but allows everyone to view customer records even if they are not on the sales team. Customer sales teams permit the customer record creator or sales team member to select a role for each sales team member. Selecting the role of Account Manager gives a sales team member the ability to view all of the opportunities and leads for the customer. The default setting of the Role field is controlled by the system profile option OS: Customer Sales Team Default Role Type.

### **Opportunity Sales Team**

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

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

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

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

member. This ensures that a team member keeps access to the information regardless of the territory assignment.

- Customer sales teams permit the customer record creator or sales team member to select a role for each sales team member. Selecting the role of Account Manager gives a sales team member the ability to view all of the opportunities and leads for the customer. The default setting of the Role field is controlled by the system profile option OS: Opportunity Sales Team Default Role Type.

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

### **Lead Sales Team and Owner Assignment**

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

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

- Only sales team members and agents or salespeople assigned the role of Account Manager can view the lead. Only those sales team members who have the Full check box checked next to their name can update the lead.
- The owner of the lead gains both read and write access automatically. In addition, the lead owner is the only person who can change lead ownership. Implementers can grant other sales team members the ability to reassign ownership by setting the profile OS: Privilege to Change Lead Owner to Yes. These individuals must have write access.
- Leads can be either assigned by the lead creator or current owner manually or automatically via a work flow program.

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

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

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

### **The Territory Manager Module and Automatic Lead Assignment**

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

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

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

### **Groups (Resource Manager)**

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

- How opportunity information is rolled up.  
Selecting a group assignment in the eBusiness Center determines where an opportunity an employee creates gets reported.
- Access to information created by subordinates.  
An employee with the role of Manager assigned to a group in the hierarchy gains access to customer, lead, and opportunity information created by individuals in that group and in subordinate groups.

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

### **Roles (Resource Manager)**

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

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

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Here are the three available roles:

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

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

### Sample Security Setup for Oracle TeleSales

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

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

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

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

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

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

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

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

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

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

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

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

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

## Case 2: Restricted Access for Both Managers and Sales Representatives

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

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

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

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

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

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

### Effects of Different Settings

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

### Access to Customer Information

The following table describes the effect of different settings on access to customer information. A customer can be either a consumer (party type of Person) or an organization. This table is organized by the different settings of the profile option

OS: Customer Access Privilege as this profile option has the biggest impact on access to customer data.

<b>OS: Customer Access Privilege Setting</b>	<b>Who Can View</b>	<b>Who Can Create</b>	<b>Who Can Update</b>
Full	Employees with any role can view all customers.	Employees with Manager, Agent, and Representative roles can create customers. The Administrator role cannot create customers.	Employees with any role can update all customers.
Prospecting	Employees with any role can view all customers.	Employees with Manager, Agent, and Representative roles can create customers. The Administrator role cannot create customers.	Employees with any role can update customer information provided they are on the sales team.  Employees with the Manager role can access customer information for their subordinates. If OS: Manager Update Access is set to <i>Update data</i> , the managers can update any customer information their subordinates can view. If this system profile is set to <i>Inherit data</i> , then the managers can only update information their subordinates can update.
Sales Team	Employees with any role can view customer information if they are on the sales team.	Employees with Manager and Agent or Rep roles can create customers. The Administrator role cannot create customers.	Employees with all roles can update customer information provided they are on the sales team.  Employees with the Manager role can access customer information for their subordinates. If OS: Manager Update Access is set to <i>Update data</i> , the managers can update any customer information their subordinates can view. If this system profile is set to <i>Inherit data</i> , then the managers can only update information their subordinates can update.  The 'OS: Enable Customer LOV Security' profile will restrict the customers for opportunity creation only when 'OS: Customer Access Privilege' is set to 'Sales Team'. In this case, the user needs at least read-only access to the customer (through the sales team directly, or through the reporting hierarchy).

### Access to Opportunity Information

The following table shows the different levels of access to opportunity information depending on a variety of system profile settings and role assignments. This table is

organized by the different settings of the profile option OS: Opportunity Access Privilege as this profile option has the biggest impact on access to opportunity data.

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

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

<b>OS: Opportunity Access Privilege Setting</b>	<b>Who Can View</b>	<b>Who Can Create</b>	<b>Who Can Update</b>
Prospecting	All employees with any role.	<p>Employees with the Manager and Agent or Rep roles can create an opportunity provided they are on the sales team for the opportunity's customer.</p> <p>Administrator roles cannot create opportunities.</p>	<p>Employees with the Agent or Rep role can update the opportunity provided they are on the sales team with the Full Access check box selected.</p> <p>Employees with the role of Manager and the OS: Manager Update Access set to <i>Update data</i> can update the opportunities accessible to subordinates. A setting of <i>Inherit data</i> means they inherit the view and update privileges of their subordinates.</p>
Sales Team	<p>Employees with the role of Agent or Rep can view an opportunity only when they are on the sales team.</p> <p>Employees with the Manager or Administrator roles can view the opportunity regardless of whether or not they are on the sales team provided a subordinate is on the sales team.</p> <p>Employees on the customer's sales team who have been assigned the role of Account Manager can view the opportunity regardless of whether they are on the opportunity sales team or not.</p>	Employees with the role of Agent or Rep can create the opportunity only when they are on the sales team and the Full Access check box is selected	<p>Employees with any role can update an opportunity provided they are on the opportunity sales team.</p> <p>Employees with the role of Manager and the OS: Manager Update Access set to <i>Update data</i> can update the opportunities accessible to subordinates. A setting of <i>Inherit data</i> means they inherit the view and update privileges of their subordinates.</p> <p>The 'OS: Enable Customer LOV Security' profile will restrict the customers for opportunity creation only when 'OS: Customer Access Privilege' is set to 'Sales Team'. In this case, the user needs at least read-only access to the customer (through the sales team directly, or through the reporting hierarchy).</p>

### Access to Sales Leads

The following table shows the different levels of access to lead information depending on a variety of system profile settings and role assignments. This table is

organized by the different settings of the profile option OS: Lead Access Privilege as this profile option has the biggest impact on access to lead data.

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

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

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

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

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

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

### Access to Contact Information, Notes, Tasks, and Interactions

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

## 4.7.2 Security Enhancements

### Overview

Oracle Sales Online and Oracle TeleSales currently have a built-in data security system. See [Section 4.7, "Setting Up Users, Security, and Reporting Hierarchy"](#) for a more detailed description of the current security set up.

In this release, we've enhanced the security features. The system administrator can manage a user, site, or responsibility's ability to create organization, person, or contact through profile options. If the user is a Sales Administrator, or if function security is used to exclude a "create" page for the use, and even if the profiles are set to Yes, the user will not be able to perform the create function.

The following is an overview of each area that has changed in the application:

- Organization/Person/Contact creation restrictions - Users will have a profile which will specify whether or not they have a create entity capability. If the user is a sales admin, he/she still cannot create Organization/Person/Contact.
- Read-Only option in Organization/Person sales team - a Full access check box will be added on both Organization and Person sales team UI. If full access is not checked for a certain user, this user will have read-only access to the organization/person records.
- Address Security - If the user cannot update the organization or person, he/she cannot create or update the addresses of the organization or person.

The profiles used to govern these restrictions are:

- OS: Create Organization Privilege
- OS: Create Person Privilege
- OS: Create Contact Relationship Privilege

The access levels for all three profiles are User Access (R/U): No, Program Access (R/U): Yes, System Admin Access (R/U): Site, Responsibility, and User. The possible values for all three profiles are, Yes or No. Default values are Yes.

### Forms Navigation

Oracle Sales Setup > System Profiles

### Responsibility

Oracle Sales Administrator

### Steps

1. Choose **Oracle Sales Setup > System Profiles** under the Sales Administrator responsibility.  
The Find System Profile Values window appears.
2. Enter your search criteria in the Display region.
3. Click in the **Profile** Field. Enter OS: Create%.
4. Click **Find**.
5. The profile is displayed in the System Profile Values window.
6. Click in the field of the profile you want to set or change.
7. Select a value from the List of Values (LOV).
8. Click **Save** on the toolbar.

## 4.7.3 Defining Resource Groups

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

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

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

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

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

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### Forms Navigation

CRM Foundation > Resource Manager > Maintain Resources > Groups

### Forms Responsibility

Oracle Sales Administrator

## Steps

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

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

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3. For each group in the hierarchy:
  - a. Enter the group name.

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

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  - b. Enter an optional description.
  - c. On the Parent Groups tab, enter the group, if any, that is above the current group in the group hierarchy.

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

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- d. On the Child Groups tab, enter the groups that are below the current group in the group hierarchy.
- e. On the Usages tab, use the LOV to enter Sales and TeleSales. You must make this entry for the group to be recognized by Oracle TeleSales.
- f. Click **Save** on the toolbar.

### Reference

For more information on using Resource Manager see *Oracle CRM Application Foundation User Guide, Release 11i, Using Resource Manager, Defining Resource Groups*.

## 4.7.4 Setting Up Employees as Users

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

### Steps

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

### Guidelines

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

## 4.7.5 Importing Employees and Assigning Them Roles and Resource Groups

Use this procedure to import employees from Oracle HRMS.

### Prerequisites

You must set up the employees in HRMS first.

### Forms Navigation

CRM Foundation > Resource Manager > Maintain Resources > Import Resources

### Forms Responsibility

Oracle Sales Administrator

### Steps

The Selection Criterion window appears.

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

The employee(s) that match your search criteria are listed below.

4. Select the check boxes for the employees you want to import as resources into your sales application. The next step will assign a single role to each of the selected resources.
5. Click **Create Resource**.  
The Default Values window appears.
6. Use the Role LOV to select one of the available roles to assign to the resource(s). See [Roles \(Resource Manager\)](#) on page 4-30 for an explanation of role types.

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

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For Oracle TeleSales the available roles are:

- TeleSales Administrator
- TeleSales Manager
- TeleSales Agent

For other sales applications, the available roles are:

- Sales Manager
- Sales Administrator
- Sales Representative

7. Click **OK**.

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

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

9. Click **Save Resource**.

The Save Resource button grays out indicating that you have successfully imported the resources.

10. To add additional roles to any of the employees then:

- a. Select the employee.
- b. Click **Details**.

The Resource window displays information about the employee.

- c. On the Role tab, use the Role Type LOV to select Sales.
- d. Use the Role LOV to select the role.
- e. Add any additional role for this employee by repeating the above two steps.
- f. Click **Save** on the toolbar and close the Resource window.

11. Assign sales groups to each employee and select the roles they are going to have in each. For each employee:
  - a. Select the employee in the Selected Resource window.
  - b. Click **Details**.

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

### Guidelines

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

Reference: *Oracle CRM Application Foundation User Guide, Release 11i*, Using Resource Manager

## 4.7.6 Setting Up System Profile Options to Give Users Access to Information

Use this procedure to give your employees different levels of access to information by setting system profile options. These system profile options, in combination with

the role and group each employee is assigned to, determine what information a user can view and modify.

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

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### **Prerequisites**

Familiarity with system profiles and concurrent programs.

### **Forms Navigation**

Profiles > System

### **Forms Responsibility**

Oracle Sales Administrator

### **Steps**

1. Set the following profile options. These apply to all sales applications. (For detailed information of available settings, see the table of system profile options provided in this guide and the explanation of lead security in [Section 4.7](#), "[Setting Up Users, Security, and Reporting Hierarchy](#)" on page 4-25.):
  - OS: Customer Access Privilege
  - OS: Opportunity Access Privilege
  - OS: Lead Access Privilege
  - OS: Privilege to Change Lead Owner
  - OS: Manager Update Access
  - OS: Sales Admin Update Access
  - OS: Always Add Creator to Customer Sales Team

2. If you are implementing Oracle Sales Online and want to give view-only access to individuals who are not granted access in the previous step, then you can set the profile options listed in this step.

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

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---

The following three profiles control access to detail pages. Setting these profiles to Yes, gives users view-only access to opportunity, organization, and person detail pages:

- OSO: Opportunity Detail Security Check
- OSO: Organization Detail Security Check
- OSO: Person Detail Security Check

A setting of Yes to the following two profiles gives competitors and partners to view-only access to customer and opportunity details:

- OS: View Partner Party Detail
- OSO: Display Opportunity Competitors in Detail

3. If you are implementing Oracle Sales Online and you want to restrict the Quick Find feature to only retrieving information users can access, then set OSO: Quick Find Security Check to 'Yes'. This enables security for the Quick Find feature.
4. To restrict sales application users to creating opportunities only for customers they can view, then set the profile OS: Enable Customer LOV Security set to 'Yes'.

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

5. Under the Oracle Sales Administrator responsibility, navigate to **Concurrent Requests > Run**.
6. Run the concurrent program Setup Checking for Sales Applications. Enter No when the Parameters window prompts you with the question: "Only for 11i upgrade?".

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

The following is a list of possible error messages:

- No directory defined in utl\_file\_dir
- Default value is missing in profile 'OS: Customer Access Privilege'
- Default value is missing in profile 'OS: Sales Lead Access Privilege'
- Default value is missing in profile 'OS: Opportunity Access Privilege'
- Invalid combination of access privilege profiles.
- You cannot set OS: Customer Access Privilege to Sales Team and OS: Opportunity Access Privilege or OS: Lead Access Privilege to Full or Prospecting.
- Default value is missing in profile 'OS: Manager Update Access'
- Default value is missing in profile 'OS: Sales Admin Update Access'
- Default value is missing in profile 'OS: Default Opportunity Status'
- Default value is missing in profile 'OS: Default Opportunity Win Probability'
- Default value is missing in profile 'OS: Default Opportunity Sales Stage'
- Profile 'OS: Default Opportunity Sales Stage' has an invalid value
- Default value is missing in profile 'OS: Default Close Date Days'
- Currency 'xxx' should be defined in FND lookup with lookup\_type 'REPORTING\_CURRENCY'
- Default value is missing in profile 'OS: Forecast Sales Credit Type'
- Default value is missing in profile 'OS: Compensation Sales Credit Type'
- Default value is missing in profile 'OS: Default Sales Channel'
- Default value is missing in profile 'OS: Maximum Roll Days for Converting Amount'
- Default value is missing in profile 'OS: Date Mapping Type'
- Default value is missing in profile 'OS: Daily Conversion Type'
- Default value is missing in profile 'OS: Forecast Calendar'
- No type mapping found in AS\_MC\_TYPE\_MAPPINGS

- Default value is missing in profile 'OS: Preferred Reporting Currency'
- Default value is missing in profile 'JTF\_PROFILE\_DEFAULT\_CURRENCY'
- No active revenue credit type found in ASO\_I\_SALES\_CREDIT\_TYPES\_V.
- No active non-revenue credit type found in ASO\_I\_SALES\_CREDIT\_TYPES\_V.
- No reporting currency found in FND lookup
- Duplicate records found in AS\_FST\_SALES\_CATEGORIES
- Duplicate records found in AS\_PE\_INT\_CATEGORIES

### 4.7.7 Setting Up Default User Role and Sales Group

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

### 4.7.8 Creating a Custom Responsibility

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

#### Steps

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

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

## 4.8 Setting Up Contact List Management

### Applies to: Sales Online

The Customer tab includes a Contact List subtab where you can manage contact lists.

A contact list is a list of your business acquaintances that you wish contact. A contact is a relationship where the subject is a person. The relationship may be either person-to-person or person-to-organization.

Setting up contact lists consists of the following steps:

### Steps

- Run the concurrent program "Purge Deleted Lists". See also [Section B.1, "Running Concurrent Programs"](#) and [Section B.2, "Table of Concurrent Programs"](#) on page B-2.
- All profiles are shipped with default values. There are no mandatory profiles to be set in this step. However, the following is a summary of the default values shipped with the seeded data:

Profile Name	Profile User Name	Usage	Default
ASF_CLSHT_USER_COMMENTS_LENGTH	OSO: Call Sheet Comment Length	The length of truncation of notes in View Comments column of Call Sheet table.	20
ASF_CLSHT_DEFAULT_TASK_PRIVATE_FLAG	OSO: Call Sheet Default Task Private Flag	The default task private flag when a quick task is to be created.	Y
ASF_CLSHT_USER_COMMENT_ONLY	OSO: Call Sheet User Comments Only	Whether only notes created by the current user or all notes created, for this contact, should be shown.	N
ASF_CLSHT_USER_TASKS_ONLY	OSO: Call Sheet USer Tasks Only	Whether only tasks owned by the current user or all tasks should be shown.	N
ASF_CLSHT_CHECK_ACCESS	OSO: Check Call Sheet Access	If the value is "Y", access will be checked and contacts that the rep does not have access to will not appear in the call sheet. Otherwise, we will show all entries in that list.	N

Profile Name	Profile User Name	Usage	Default
	OSO: Create a list with filter conditions	If set to No, a contact list will be created manually by default. This profile is also available from the Profiles > Customer page.	No
ASF_LIST_DEFAULT_PUBLIC_FLAG	OSO: List Creation Default Public Flag	If a list is created, it will be public by default on the List Creation page.	N
ASF_LIST_PRIMARY_ADDRESS_ONLY	OSO: List Entries Show Primary Address Only	If set to Y, only the primary address of the contact is shown in list entry tables.	N
ASF_LIST_MIN_PURGE_AGE_IN_DAYS	OSO: List Purge Minimum Number of Days	Minimum age of list in days before its entries can be purged.	10
ASF_LIST_DEFAULT_ADDRESS_STATUS	OSO: List Query Default Address Status	Default address status radio button value in Address Filter page. The default value will be ignored if no Country is picked on that page.	A (A/I/B)
ASF_LIST_DEFAULT_CONTACT_STATUS	OSO: List Query Default Contact Status	Default contact status radio button value in Contact General Filter page.	A (A/I/B)
ASF_LIST_DEFAULT_RELATIONSHIP_OBJ_TYPE	OSO: List Query Default Relationship Type	Whether by default contacts for organizations or for persons are to be queried.	ORG (ORG/PER)
ASF_CLSHT_NUM_OF_DAYS_WEEKLY	OSO: Number of Days in Call Sheet Weekly Calendar	How many days to be shown in weekly calendar.	5
ASF_CLSHT_START_DAY_WEEKLY	OSO: The Starting Day in Call Sheet Weekly Calendar	The starting day of the week in the weekly calendar.	Monday (Sun-Sat)
JTF_TASK_DEFAULT_TASK_PRIORITY	Task Manager: Default Task Priority	The default task priority when a quick task is to be created.	
JTF_TASK_DEFAULT_TASK_STATUS	Task Manager: Default Task Status	The default task status when a quick task is to be created.	
JTF_TASK_DEFAULT_TASK_TYPE	Task Manager: Default Task Type	The default task type when a quick task is to be created.	

If desired, change profiles using the following steps. Refer to the above table for a listing of profiles.

### Steps

1. Choose **Oracle Sales Setup > System Profiles** under the Sales Administrator responsibility.

The Find System Profile Values window appears.

2. Enter your search criteria in the Display region.
3. Click in the **Profile** Field. Enter a partial name of the profile using "%" as a wild card.
4. Click **Find**.

The profiles are displayed in the System Profile Values window.

5. Click in the field of the profile you want to set or change.
6. Select a value from the List of Values (LOV).
7. Click **Save** on the toolbar.

The following lookups are included for contact list management:

Filter	Prompt
Detail	Title, Gender, Sales Group
Relationship	Person to Organization Relationship Type, Person to Person Relationship Type, Department Type, Job Title Type, Role
Address	Country
Customer Classification	Class Category

### 4.8.1 Creating Custom Filters

Use the following procedure to create custom filters for creating contact lists.

**Applies to: Sales Online**

#### Responsibility

System Administrators can create custom filters using three steps:

- **Register an FND lookup:** to tell the application about the existence of the new filter page
- **Create a JSP file:** which will display the HTML components
- **Write a new Java class:** implementing the provided Java interface to generate and save the SQL

## Steps

### 1. Registration of a Filter Page:

- a. When a new filter page is created, an entry in the FND Lookup `ASF_LIST_QUERY_FILTERS` will need to be created. The code of that entry will be a unique identifier for the filter section, e.g., "ADDRESS". The meaning will be a displayable name, like "Address Filter". This will be used as the page title and the filter condition type in the List Properties page.
- b. Also a new FND function needs to be created. That function's HTML call should be "asfListQueryMain.jsp?LISTQCODE=<lookup code defined above>". This function needs to be under the menu trees for responsibilities of this application. Then customer needs to define an AK attribute, whose prompt is the code of this function. This prompt needs to be added to `ASF_FUNC_SEC_REG` AK region as a region item. Afterwards, the system administrator needs to use the cue-card Administration page to make that new page appear in the List Filters cue-card.
- c. Create a property for ASF application in Oracle JTF's property management pages. The property name should be "list.queryFilters.<lookup code defined above>". It should have one value "CLASS\$<class name>". That class name should be the full class name of a class which implements `oracle.app.asf.list.ListQueryFilter` interface.

### 2. Section JSP:

Each filter section JSP must satisfy the following requirements.

- a. Logic relationship between different filter pages is "AND".
- b. All HTML form elements should be named as `<section name>.OBJ.<fieldname>`.
- c. Section name must be prefixed with "asfListFlt". So a possible field could have a name "asfListFltTransaction.OBJ.amount". Each filter page needs to have a unique section name.
- d. There must be a hidden field called `<section name>.OBJ.LISTQCODE`. The content of the field has to be the code of the entry in FND Lookup `ASF_LIST_QUERY_FILTERS` for that filter page.
- e. Customer will only need to provide the filter page which renders their filters. All filter pages will share same main and render JSP pages.

### 3. VO Java Class:

Each filter page will need a Java class which implements `oracle.apps.asf.list.ListQueryFilter` interface. In this class, the following functionalities should be taken care:

- a. Provide information about the filter, e.g., JSP file name.
- b. Based on the value that is in the HTML request, SQL segments will be appended. It should be implemented in this way so that if all fields relevant to a table do not have a value, that table should not even appear in the FROM clause.
- c. Two SQL segments should be generated in this class: database table names and alias for FROM clause, and conditions in WHERE clause. The generated WHERE clause piece will be appended with the other WHERE clauses connected by "AND".

This interface will have the following methods:

- `public void initialize (javax.servlet.jsp.PageContext pageContext, javax.servlet.http.HttpServletRequest request)` throws `java.lang. Exception`: Initialize a `ListQueryFilter` class instance with current `PageContext` and a request, from which all data in requests can be obtained.
- `public void initialize (javax.servlet.jsp.PageContext pageContext, String queryType)` throws `java.lang. Exception`: Initialize a `ListQueryFilter` class instance with the current `PageContext` instance, and a query type name. This type is the code in the FND Lookup entry for this filter page. With the query type, saved `QueryParameters` can be retrieved from JTT's personalization schema. Within this method, `oracle.apps.asf.list.ListQueryManager` class, which takes a `PageContext` instance in its constructor, can be used. This method is used to modify filter conditions for an existing list. It is not required to be implemented for this release.
- `public static String getJSPFileName()`  
Return the name of filter section's JSP file name, like "asfListQueryPersFlt.jsp".
- `public static String getFunctionName()`  
Return the name of filter section's FND function name, like "ASF\_LIST\_QUERY\_PERS".
- `public static String getListQueryCode()`

Return the code defined in ASF\_LIST\_QUERY\_FILTERS lookup for this page, like “ASF\_LIST\_QUERY\_PERS”.

- `public String getFromClause();`  
 A part of FROM clause to be generated, based on filter conditions in request or saved queries. The returned string should be like this: “XXX\_SOME\_TABLE xst, XXX\_ANOTHER\_TABLE xat”. It should never return null. It can return an empty string.
- `public String getWhereClause();`  
 A part of WHERE clause to be generated, based on filter conditions in request or saved queries. The returned string should be like this: “AND xst.PARTY\_ID = REL.SUBJECT\_ID AND xat.TRANSACTION\_ID = xst.TRANSACTION\_ID”. It should never return null. It can return an empty string. Only tables appeared in `getFromClause()`, HZ\_PARTIES (PER) and HZ\_RELATIONSHIPS (REL) can be used. The returned string should start with AND, if it’s not empty.
- `public oracle.apps.jtf.personalize.QueryParameter[] getQueryParameters();`  
 An array of JTT’s QueryParameter instances to be generated, based on filter conditions in request or saved queries. Those QueryParameters will be saved in JTT’s personalization schema later. Within this method, `oracle.apps.asf.list.ListQueryManager` class can be used to generate QueryParameter instances. If a condition uses operator IN, the limitation on the length of a condition value may be a problem. To work around it, one IN condition can be separated to many “IN” conditions. More details are provided in ListQueryManager class, List Property chapter.
- `public QueryParameter convertToDisplay(String QueryParameter);`  
 Each program that implements this interface has the duty to resolve prompts and format value. Each filter condition has an application column name, like `jobTitleCode`. When this condition is saved, this name will be used as the `parameterName` of QueryParameter. However, when the condition is displayed in the List Properties page, the column name needs to be meaningful, and even translated. We do not restrict by which means this prompt resolution shall be implemented. In OSO, we will use AK region/region items to do it. Also, the `parameterValue` of this QueryParameter will be a code, like “ANALYST”. When we display this filter condition, we will need to display it as “Job Title Type = Analyst”. The corresponding meaning of that lookup entry needs to be used for display purpose. Another situation may be to format a number or a date. The

format should be of the current user, instead of the user who applied filter conditions. As the result, we store application column name, raw data, and lookup code in the database. When they are displayed, this method should solve the prompt, format data, and retrieve lookup meaning. The converted prompt will be stored as `parameterName` in the returned `QueryParameter`, and lookup meaning or formatted data will be stored as `parameterValue` in the returned `QueryParameter`.

### Other Settings

Three more settings are necessary to make new filter pages work. These settings are required for all JSP pages in the application.

- Create an FND function whose HTML Call is “`asfListQueryMain.jsp?LISTQCODE=<code in FND Lookup ASF_LIST_QUERY_FILTERS for that filter page>`”. The function needs to be put under the `ASF_LIST_OTHER` menu.
- Create an AK attribute whose prompt is the function name of the function created above, and add that attribute to `ASF_FUNC_SEC_REG`.
- Add the new page as a link in the cue-card using the cue-card administration page. This page is located under the Administration tab of Oracle Sales Online.
- Create an AK attribute called `<your function code>_TTL` and add it to the `ASF_PAGE_TITLES` region to set the HTML page title for your page.

## 4.9 Setting Up Lead Management

### Applies to: Sales Online, TeleSales

Setting up leads consists of the following:

- [Section 4.9.1, "Lead Status Changes for Customers Upgrading from Previous Versions" on page 4-57](#)
- [Section 4.9.2, "Setting Up Lead Status" on page 4-57](#)
- [Section 4.9.3, "Setting Up Automatic Lead Assignment" on page 4-59](#)
- [Section 4.9.4, "Setting Up Lead Rules Engine" on page 4-63](#)
- [Section 4.9.5, "Setting Up Qualification Rules" on page 4-65](#)
- [Section 4.9.6, "Setting Up Rating Rules" on page 4-67](#)

- [Section 4.9.7, "Setting Up the Channel Selection Rules" on page 4-70](#)
- [Section 4.9.8, "Setting Up Profiles" on page 4-72](#)
- [Section 4.9.9, "Rule Engine Qualifiers" on page 4-78](#)
- [Section 4.9.10, "Migrating Lead Engines from 11.5.7 to 11.5.8" on page 4-81](#)

### See Also

[Section 4.10, "Importing Leads" on page 4-89](#)

## 4.9.1 Lead Status Changes for Customers Upgrading from Previous Versions

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

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

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

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

## 4.9.2 Setting Up Lead Status

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

- New
- In Progress
- Converted to Opportunity

- Dead Lead
- Loss

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

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > Sales > Opportunity > Status Code

### Responsibility

Oracle Sales Online Super User

### Steps

1. Click **Create**.

The Status Code Values page appears.

2. Enter the status code name in Status Code. Users cannot see this name. It is for your own internal use only.
3. Enter the meaning in the Meaning field. This is what users see on their drop-down list when they select a lead status.
4. Add an optional description for the status.
5. Select the **Enabled** check box.

---

---

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

---

---

6. In the 'Used for' region, select the Sales Lead check box.
7. Make sure that 'Neither' is the radio button selected in the Win Loss Indicator region. The other radio buttons are reserved for opportunity statuses.

8. Click **Create**.

### 4.9.3 Setting Up Automatic Lead Assignment

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

#### Forms Navigation

Profiles > System

#### Forms Responsibility

Oracle Sales Administrator

#### Steps

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

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

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

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

---

---

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

---

---

3. If the territories in your organization use agent availability as one of the criteria for assigning agents, then setting the profile OS: Calendar Setting Required for Assignment to 'Yes' enables the automatic assignment of lead owners based on

availability. If you are using agent availability for assigning lead ownership then you must make sure that each resource has a calendar set up for them. OS: Calendar Setting Required for Assignment is set to 'No' by default. See Implementing Calendar section of the *Oracle CRM Application Foundation Implementation Guide* for more details.

4. Optionally, you can implement custom rules for lead assignment by implementing the Lead Routing Engine user hook described below.
5. After the lead is assigned either automatically or by the user, the application changes the lead status to the status set in profile option OS: Lead Routing Status. The "Out of the box" value is 'New'. If you wish to change this default, do so now.

### Lead Routing Engine

Hook name: AS\_LEAD\_ROUTING\_WF

Package Name: AS\_LEAD\_ROUTING\_WF\_CUHK

#### Purpose

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

---

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

---

---

This user hook will be called when an agent or salesperson is creating and updating a lead in the Lead tab, and from the lead import program whenever the routing engine is called.

The calling package is AS\_LEAD\_ROUTING\_WF.GetOwner.

#### API name

Get\_Owner\_Pre

#### In Parameters

The following four parameters are standard input:

Parameter	Description
p_api_version_number	For 11i Oracle Sales applications, this is set to 2.0.

---

<b>Parameter</b>	<b>Description</b>
p_init_msg_list	Initialize message stack or not. Set to FND_API.G_FALSE by default.
p_validation_level	Validation level of pass-in value. Set to FND_API.G_VALID_LEVEL_FULL by default.
p_commit	Whether commit the whole API at the end of API. Set to FND_API.G_FALSE by default.

---

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

- p\_resource\_id\_tbl
- p\_group\_id\_tbl
- p\_person\_id\_tbl

Other parameters:

Parameter	Description
p_resource_flag_tbl	<p>This parameter specifies the source of the resource:</p> <ul style="list-style-type: none"> <li>▪ 'D': Default resource from the profile AS_DEFAULT_RESOURCE_ID, "OS: Default Resource ID used for Sales Lead Assignment".</li> <li>▪ 'L': Login user.</li> <li>▪ 'T': Territory definition.</li> </ul> <p>If the sales lead matches any territory, the above parameters will include all the resources returned from territory engine and p_resource_flag_tbl will be all 'T'.</p> <p>If the sales lead does not match any territory:</p> <ol style="list-style-type: none"> <li>1. Profile "OS: Default Resource ID used for Sales Lead Assignment" is set: <ul style="list-style-type: none"> <li>▪ p_resource_id_tbl(1), p_group_id_tbl(1), p_person_id_tbl(1) is the default resource defined in this profile.</li> <li>▪ p_resource_flag_tbl(1)='D'</li> <li>▪ p_resource_id_tbl(2), p_group_id_tbl(2), p_person_id_tbl(2) is the login user.</li> <li>▪ p_resource_flag_tbl(2)='L'</li> </ul> </li> <li>2. Profile "OS: Default Resource ID used for Sales Lead Assignment" is not set: <ul style="list-style-type: none"> <li>▪ p_resource_id_tbl(1), p_group_id_tbl(1),</li> <li>▪ p_person_id_tbl(1) is the login user.</li> <li>▪ p_resource_flag_tbl(1)='L'</li> </ul> </li> </ol>
p_sales_lead_rec	<p>This provides the whole definition of a sales lead. This record is provided to help an Oracle customer decide sales lead owner.</p>

### Out Parameters

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

- x\_resource\_id
- x\_group\_id
- x\_person\_id

Together these set the sales lead owner.

If x\_resource\_id is NULL, the owner is decided based upon Oracle's logic.

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

Standard output parameters:

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

#### 4.9.4 Setting Up Lead Rules Engine

Setting up the lead rules engine is comprised of setting up the qualification engine, the rating engine, and the channel selection engine.

- The Qualification Engine replaces the current Qualification profiles. (These profiles check to ensure the corresponding fields are not null. If they are not null, the lead is qualified.) This engine is used to confirm that there is sufficient interest for a selling interface to engage the prospect through a touch point. See [Section 4.9.5.1, "Qualification Engine Overview" on page 4-65](#)
- The Rating Engine replaces the existing Scorecard and Mapping function. (This uses a scorecard to compute a score, and then maps the score to a Rank Mapping.) Leads are graded using specific business-specific logic appropriate to different campaign strategies, regions, or products. Grading enables the business to prioritize follow-up and response handling for effective cost and resource management. See [Section 4.9.6, "Setting Up Rating Rules" on page 4-67](#)
- The Channel Selection Engine is new. Depending on the quality or domain of the lead, the lead is channeled to a set of resources for assignment: direct or indirect. A sales channel is direct when routed to the company's sales force and indirect when routed to partners or value added distributors. See [Section 4.9.7.1, "Sales Channel Selection Engine Overview" on page 4-70](#)

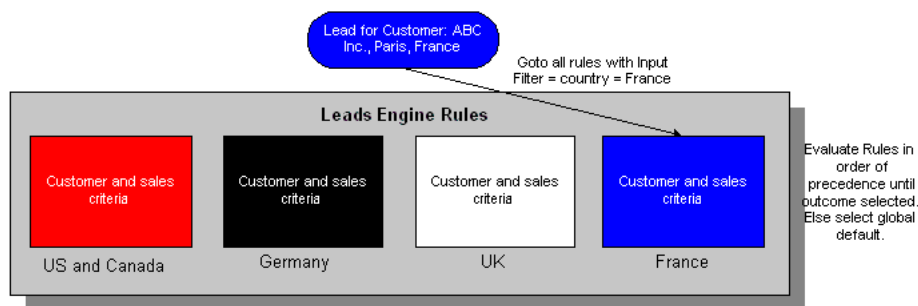
**Note:** The Leads Rules Engine runs only if the profile "OS: Run new Lead Qualification/Rating/Channel Engine" is set to 'Y'.

The three new engines are based on a generic rules model, which consists of an Input Filter, Precedence, and Criterion.

- Rule Input Filters are used to group rules into domain-specific buckets. These parse rules into groups based on business-specific practices. Each rule defines the set of leads to which it applies, including product-, campaign-, and country-specific lead processing logic for each stage of lead evaluation.

For example, for country-specific input filters:

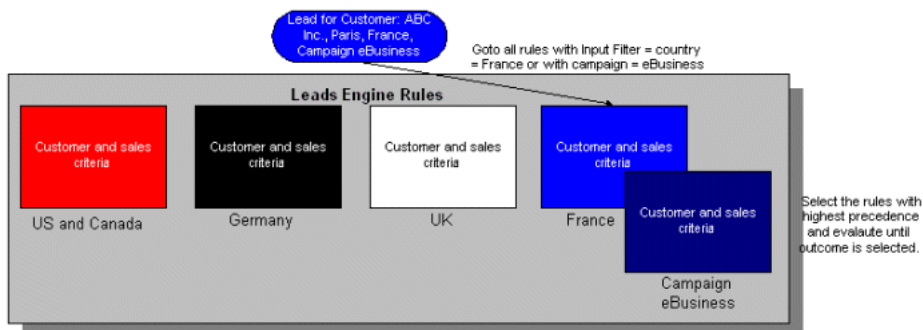
**Figure 4–1 Lead Engine Example 1**



- Once rules are bucketed into different groups, the Precedence of each rule is used to determine the order of evaluation. Where filters overlap, this enables the business to ensure the highest priority regional, customer, or marketing strategy is used to evaluate the lead.

For example, by assigning a Campaign-specific rule higher precedence, this rule will be evaluated before a region-specific rule:

Figure 4-2 Lead Engine Example 2



On evaluation, the winning rule with the highest precedence is used to select the rule result. If more than one winning rule has equal precedence, the 'best', or highest ranked result, wins.

- Once the correct rules are selected, the Criteria of each rule determine the conditions and action to be performed on the lead. For example, if certain conditions are true at the time of evaluation, set the lead to qualified, to grade: A, or to Direct sales.

## 4.9.5 Setting Up Qualification Rules

Use this procedure to enable the automatic qualification of leads.

The qualification engine is run only if the Qualified\_flag is null and the profile "OS: Auto Qualify Lead" is set to 'Y'.

### 4.9.5.1 Qualification Engine Overview

When a lead is run through the new Rules Engine, the Qualification Engine first identifies the correct qualification rules to evaluate by processing the rule Input Filters. This process finds all matching rules by applying the lead attribute values against each qualification rule's input filter values. For example, find all rules for Campaign A or B, or all rules for Product Y.

---

---

**Note:** Input Filters can have multiple qualifying conditions. There is an implicit 'AND' across conditions and an implicit 'OR' within condition. For example, If Input Filter is 'Country = 'France', 'Germany', 'UK'; 'Product Category = 'Printers', 'Desktops', this is interpreted as 'evaluate all leads that originate from countries 'France' or 'Germany' or 'UK', AND for product lines 'Printer' or 'Desktops'.

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Once the matching qualification rules are identified, the engine starts evaluating the Criteria of each rule, starting with the rule of highest precedence. For example, is Budget approved, is Time frame specified, is phone number specified, and so on.

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**Note:** There is an implicit 'AND' across conditions and an implicit 'OR' within a condition.

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When a rule wins, i.e., all the qualification criteria of the rule are met for the lead, the engine stops evaluation. The lead is then qualified and the winning rule is logged into a history table for analysis.

If no rules win, by default the lead is set to "Not Qualified".

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**Note:** Only qualified leads go on to the Rating and Channel Selection engines, and assignment. For unqualified leads, the immature lead handling process kicks in and handles assignment, and builds a repository of unqualified leads for the selected resource.

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### **Prerequisites**

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

### **Forms Navigation**

Administration > Administration

### **HTML Navigation**

Administration > Leads > Set Up > Qualification Rules

## Steps

Set up one or more qualification rules for lead qualification.

1. Click **Create**.
2. Each rule requires:
  - Qualification Rule Name: Enter the name by which the rule will be identified. Description is optional.
  - Start Date and End Date: These are the date between which the rule is valid.
  - Select a Status from the drop down list.
  - Enter the Precedence. Each rule can have different precedence, to define order of importance for evaluation (where 100 is higher than 1).
  - Select the Currency that is to be associated with this rule.
  - Find the Owner by entering a name. Click **Go**.
  - At least one Input Filter, which defines which leads the rule should be applied to.
  - And one or more Rule Criteria, or conditions to test against the lead.
3. Click **Create**.

For a complete list of supported conditions, see [Section 4.9.9, "Rule Engine Qualifiers"](#).

## 4.9.6 Setting Up Rating Rules

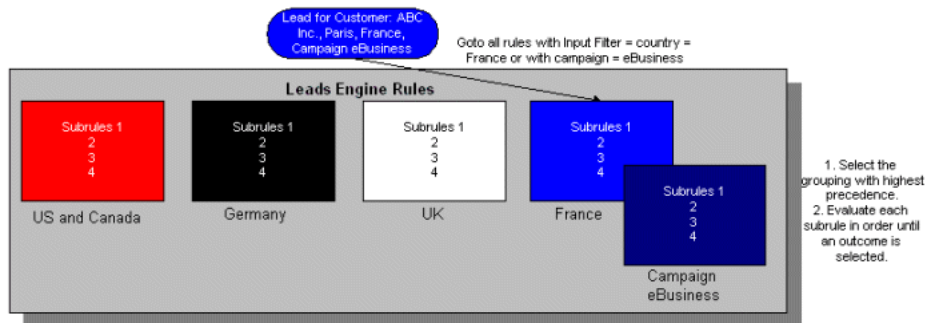
### 4.9.6.1 Rating Engine Overview

The Rating Engine differs from qualification in that for each rating rule, the criteria are a set of sub-rules, each of which has their own precedence, or order of evaluation. These sub-rules effectively comprise the rules for each grouping (such as France, or Campaign eBusiness).

Each Rule is a grouping of sub-rules. The rule is defined by its Input Filter. The subrules define the criteria and grade outcome.

For example:

**Figure 4–3 Rating Engine Example 1**



When a lead is run through the Rating Engine, the engine first identifies the correct Rating rules to evaluate. This process finds all matching rules by applying the lead attribute values against each rule’s input filter values. For example, find all rules for Campaign A, or all rules for Product Y.

---

**Note:** Input Filters can have multiple conditions. There is an implicit 'AND' across conditions and an implicit 'OR' within conditions. For example, if the Input Filter is defined as 'Country = 'France', 'Germany', 'UK'; 'Product Category = 'Printers', 'Desktops', then this is interpreted as 'evaluate all leads that originate from countries 'France' or 'Germany' or 'UK' for product lines 'Printer' or 'Desktops'.

---

Once the matching Rating rules are identified, the engine starts evaluating the sub-rules for each rule, starting with the rule of highest precedence. The Rating engine evaluates the sub-rules in the order of evaluation assigned and stops when it finds a sub-rule that wins (matches the lead).

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**Note:** There is an implicit 'AND' across conditions and an implicit 'OR' within conditions. For example, If Grading sub-rule is defined as 'Condition(s) è 'Customer/Account Type' = 'Non Named Account'; 'Budget Amount' less than 50K', then this is interpreted as 'evaluate all leads for non named account with and 'Budget Amount' less than 50K'.

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When a sub-rule wins, i.e., all the criteria are met for the lead, the Rating engine stops evaluation. The lead is then graded and the winning rule is logged into a history table for analysis.

If more than one rule wins with equal precedence, the highest ranked grade is selected.

If no rules win, the default grade set in OS: Default Rank for Lead Rating Engine is used.

### **Forms Navigation**

Administration > Administration

### **HTML Navigation**

Administration > Leads > Set Up > Rating Setup

### **Steps**

Set up each rank for the Rating Engine. For example: A+, A, B, C, D.

You then rank the grades for rule tie breaking, where the highest ranked grade is rated the highest (e.g., 100 is higher than 1). If more than one rule is true at the time of evaluation with equal precedence, the highest ranked grade will win.

### **HTML Navigation**

Administration > Leads > Set Up > Rating Rules

Set up one or more rules for lead grading. Each rule can have different precedence, to define order of importance for evaluation (where 100 is higher than 1).

### **Steps**

1. Click **Create**.
2. Each rule requires:

- **Rating Rule Name:** Enter the name by which the rule will be identified. Description is optional.
  - **Start Date and End Date:** These are the date between which the rule is valid.
  - Select a Status from the drop down list.
  - Enter the Precedence. Each rule can have different precedence, to define order of importance for evaluation (where 100 is higher than 1).
  - Select the Currency that is to be associated with this rule.
  - Find the Owner by entering a name. Click **Go**.
  - At least one Input Filter, which defines which leads the rule should be applied to.
  - And one or more Rule Criteria, or conditions to test against the lead, and a grade outcome.
3. Click **Create**.

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---

**Note:** Sub-rules are evaluated in ranked from 1-n, where 1 is evaluated first. For a complete list of supported conditions, see: [Section 4.9.9, "Rule Engine Qualifiers"](#).

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The rating engine is run only when lead\_rank\_id is null and the profile "OS: Rank Lead" is set to "SYSTEM".

## 4.9.7 Setting Up the Channel Selection Rules

### 4.9.7.1 Sales Channel Selection Engine Overview

Sales Channel Selection is similar to the Rating Engine in that for each channel selection rule, the criteria are a set of sub-rules. Each sub-rule contains attributes used for determining the best channel for a lead and is associated with a channel selection outcome.

When a lead is run through the Channel Selection Engine, the engine first identifies the correct rules to evaluate. This process finds all matching rules by applying the lead attribute values against each rule's input filter values.

Once the matching channel rules are identified, the engine starts evaluating the sub-rules for each rule, starting with the rule of highest precedence. Each sub-rule has an order of evaluation associated with it. The Channel Selection Engine

evaluates the sub-rules in that order and stops when it finds a sub-rule that matches the lead.

When a sub-rule wins, i.e., all the criteria are met for the lead, the engine stops evaluating channel rules. The lead is then channeled and the winning rule is logged into a history table for analysis.

If more than one rule wins with equal precedence, the highest ranked channel is selected.

If no rules win, the default grade set in the profile "OS: Default Channel for Lead Channel Selection Engine" is used.

## Forms Navigation

Administration > Administration

## HTML Navigation

Administration > Leads > Set Up > Channel Setup

## Steps

1. Select each channel type value for the Channel Selection Engine. For example: Direct, Indirect, Immature, Reseller, Field Sales. (Channels are used from Oracle Order Management.)
2. You then rank the channels for rule tie breaking, where the highest ranked channel is rated the highest (e.g., 100 is higher than 1). If more than one rule is true at the time of evaluation with equal precedence, the highest ranked channel will win.

Each channel must default to direct or indirect channels: The direct channel is integrated with Oracle Sales applications; the indirect channel is integrated with Oracle Partners application.

## HTML Navigation

Administration > Leads > Set Up > Channel Selection Rules

## Steps

1. Click **Create**.
2. Set up the channel rules for lead distribution. Each rule can have different precedence, to define order of importance for evaluation (again, where 100 is higher than 1).

3. Each rule requires: Main Details (Name, Precedence, Valid Dates, and Currency); at least one Input Filter, which defines which leads the rule should be used for; and Rule Criteria - or sub-rules, each of which defines one or more conditions to test against the lead, and a channel outcome.

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**Note:** Sub-rules are evaluated in ranked from 1-n, where 1 is evaluated first. For a complete list of supported conditions, see [Section 4.9.9, "Rule Engine Qualifiers"](#).

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## 4.9.8 Setting Up Profiles

### Forms Navigation

Profiles > System

### Forms Responsibility

Oracle Sales Administrator

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

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

- **Req.?:** A Y in this column means that setting this profile is required. An N in this column means that setting this profile is optional.
- **New:** A Y in this column indicates this profile is new in this release. An N means that it was introduced in prior releases.
- **Profile Option:** User name of the profile option.
- **Level:** Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.
- **User:** This column indicates whether user can view and modify the profile. Values are: V (Visible) = the user can see the profile only, U (Updatable) = users themselves can update the profile.
- **Default Value:** Gives the seeded default.
- **Notes:** Usage notes.

The following table lists lead profiles:

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
Y	N	OM: Item Validation Organization	SR	V	V	None	Manufacturing organization items are validated. This profile is used to set AS_SALES_LEAD_LINES.organization_id
Y	Y	OS: Address Required for Person	S	None	V	'N	If set to 'Y', the Lead Contact page in Oracle Sales Online displays the Create Person button. The person or contact has to be created by clicking this button and entering address information on the Create Person page. If set to 'N', the user can enter contact information in empty rows.
N	Y	OS: Address Required for Sales Lead	S	None	V, U	No	Makes address entry mandatory for leads. If not set, then address is required. The API gives users an error if the address is required but not present in the record.
N	Y	OS: Assign New Lead	S	None	V	Nz	<p>if this profile is set to No, then the application uses the Territory Manager to automatically assign resources to the lead. The first person the Territory Manager assigns becomes the owner. The rest of the resources in the territory become sales team members on the lead.</p> <p>if this profile is set to Yes, then the agent must enter the owner manually using the Owner drop-down list. If the agent does not make an entry, then the lead is assigned to the default user set in OS: Default Resource ID Used for Sales Leads. If no default resource is set, then application assigns ownership to the user updating or importing the lead.</p> <p>Note: If both the resource in this profile and the user who created or updated the lead do not have a valid sales role assigned to them, then the leads you import will not be accessible from either Oracle Sales Online or Oracle TeleSales.</p>

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	Y	OS: Auto Qualify Lead	S	V	V	Yes	Turns automatic qualification for sales leads on or off. A setting of Yes, causes the application to attempt to qualify a lead when the "Qualified" check box is null.  A setting of No means the user must qualify the lead manually by selecting the Qualified check box.  If this profile is not set, it is defaulted to 'N'.
N	N	OS: Budget status required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a budget status to qualify the lead. If the profile option value is No, then lead qualification does not depend budget status entry.
N	N	OS: Calendar setting required for assignment	S	V	V	N	Calendar setting required for sales lead assignment. If set a "Yes", then the routing APIs check availability of resource in JTF Calendar before assigning the lead owner.
N	N	OS: Campaign code required	S	None	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a campaign code to qualify the lead. If the profile option value is No, then lead qualification does not depend on the campaign code.
N	N	OS: Contact phone required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a contact phone to qualify the lead. If the profile option value is No, then lead qualification does not depend on the contact phone.
N	N	OS: Contact role required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a contact role to qualify the lead. If the profile option value is No, then lead qualification does not depend on the contact role.
Y	N	OS: Customer Access Privilege	S,R,U	None	V,U	Full	Security management for leads. See the section on security for details.
NOT USED	Y	OS: Dead Lead Status	S	None	V	Dead Lead	Not Used

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	N	OS: Decision time frame required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a decision time frame to qualify the lead. If the profile option value is No, then lead qualification does not depend on the decision time frame.
N	Y	OS: Default Budget Status for Leads	S, R, U	V, U	V, U	Pending	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
Y	Y	OS: Default Channel for Leads	S, R, U	V, U	V, U	Direct	Used for defaulting value in UI and also in API. If not set, then the application inserts a null value and notifies the user of an error.
	11.5.8	OS: Default Channel for Lead Channel Selection Engine	S			Direct	This sets the default for each lead if no channel selection rules evaluate to true.
N	Y	OS: Default Decision Timeframe for Leads	S, R, U	V, U	V, U	Within 1 week	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
N	Y	OS: Default Lead Contact Role	SRUA	VU	V	END_USER	Used for defaulting the contact role on the contact page.
	11.5.8	OS: Default Lead Marketing Owner	S				The immature lead owner assignment API will use the default marketing lead owner if owner cannot be found in the owner table.
n/a	n/a	OS: Default Lead Scorecard (obsolete)	SRA	VU	V	1	Scorecard to be used for lead ranking. If not set, the scoring engine will not function. While creating leads, the UI retrieves this value and passes it to the scoring APIs.
	11.5.8	OS: Default Rank for Lead Rating Engine	S			Cold Lead	This sets the default if no ranking rules evaluate to true.

## Setting Up Lead Management

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
N	N	OS: Default Resource ID Used for Sales Lead Assignment	S	None	V	None	<p>The territory assignment program assigns ownership of a lead to this Resource ID if the program does not find any matching territory for the lead.</p> <p>If this profile is not set, then the ownership of any unassigned leads are automatically assigned to the user creating or importing the lead. This user must have a valid sales role assigned using Resource Manager. If the user does not have a valid sales role, then unassigned leads will not be accessible from Oracle Sales Online or Oracle TeleSales.</p>
Y	Y	OS: Default Status for Leads	S, R, U	V, U	V, U	New	Used for defaulting value in UI and also in API. If not set, then the application inserts a null value and notifies the user of an error.
N	Y	OS: Default Vehicle Response Code for Leads	S, R, U	V, U	V, U	User	Defaults value in UI and API. If not set, this profile inserts a null value in the database table.
		OS: Lead Incubation Channel	S				Immature lead owner assignment will be used if the sales channel in the profile value matches the channel code returned by the Channel Selection Engine.
Y	Y	OS: Lead Link Status	V	None	V	Converted to Opportunity	Used to set the status of the lead after linking the lead to an opportunity.
Y	Y	OS: Lead Routing Status	S	None	V	New	When the routing engine finds a sales lead owner, then the sales lead status is reset to this profile
Y	Y	OS: Lead to Opportunity Move Sales Team	S		V, U	No	When converting a lead to an opportunity, you can govern whether all the sales team members are copied to the opportunity sales team by setting this profile. If set to Yes, all sales team members are copied to the new opportunity. If set to No, the sales team is limited to the sales rep who converted the lead, plus those sales reps who are included per the territory manager settings. The "Keep" flag is copied as is, and the "Owner" flag is copied as "No".
Y	N	OS: Manager Update Access	S,R,U	None	V,U	View data	Security management for leads. See the section on security for details.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
Y	N	OS: Opportunity Access Privilege	S,R,U	None	V,U	Global Full	Security management for leads. See the section on security for details.
N	Y	OS: Privilege to Change Lead Owner	S, R, U	None	V,U	No	A user with this privilege can change the owner of a lead to which he/she has update access. Users who do not have this privilege can change owner of only those leads that they own. This profile is used to allow the user to change lead owner even if the user is not the current owner for lead. If not set, the application default this profile to No.
N	N	OS: Project name required	S	V, U	V,U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a project name to qualify the lead. If the profile option value is No, then lead qualification does not depend project name.
N	Y	OS: Rank Lead	S	None	V	System	The Rating Engine is run when this is set to SYSTEM, if the Rank ID is null.
	11.5.8	OS: Run New Lead Qualification, Rating, Channel Selection Engines	S			Y	Locked at Y to run new rules engine.
Y	N	OS: Sales Admin Update Access	S,R,U	None	V,U	View data	Security management for leads. See the section on security for details.
N	N	OS: Sales channel required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a sales channel to qualify the lead. If the profile option value is No, then lead qualification does not depend on sales channel entry.
Y	N	OS: Sales Lead Access Privilege	S, R, U	None	V,U	Full	<Access APIs>
N	Y	OS: Source Code Mandatory for Leads	S	V	V	No	Used to make source code (campaign) entry mandatory for leads. A Yes setting causes an error to appear if a user tries to save a lead without a source code. If this profile is not set, the application treats this as a Yes setting.
N	N	OS: Total budget amount required	S	V, U	V, U	Yes	Used by auto qualification process in leads API. If value is Yes, then the user must enter a total budget amount to qualify the lead. If the profile option value is No, then lead qualification does not depend on the total budget amount.

Req.?	New	Profile Option	Level	User	Program	Default Value	Notes
Y	N	OSO: Default Country	SRAU	VU	VU	United States	Used for defaulting the country selected on the create lead page. If not set, the first country in the drop-down list will be chosen by default.
N	N	OSO: Default Person Relationship	SRU	VU	V	'EMPLOY EE_OF	The default value for contact relationship type.

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

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

### 4.9.9 Rule Engine Qualifiers

The following tables list the supported attributes for the Leads Rules Engine.

#### Input Filter Attributes

Attribute	Table.Column	Links
Creation Date	As_sales_leads.creation_date	

Attribute	Table.Column	Links
Country	hz_locations.country	From as_sales_leads link to hz_party_sites mappingAddress_id and party_site_id  From hz_party_sites link to hz_locations mappingLocation_id with location_id
Product Interest (Purchase Line)	as_sales_lead_lines.interest_type_id	
Campaign	as_sales_lead.source_promotion_id	
Lead Status	as_sales_leads.status_code	
Additional Channel Offering	Pv_attribute_codes_vl.description for attribute 'Additional channel offering'	Pv_lead_pss_lines.attr_code

### Rule Criteria Attributes

Attribute	Table.Column	Links
Customer Category	hz_parties.category_code	Seeded lookup type "Customer Category"
Customer Annual Revenue	hz_organization_profiles.curr_fy_potential_revenue	From as_sales_leads link to hz_organization_profiles mappingCustomer_id and party_id
Primary Contact Specified	as_sales_leads.primary_contact_party_id	As_sales_leads to hz_parties.party_id
Purchase Timeframe	as_sales_lead_contacts.contact_role_code	From as_sales_leads link to as_sales_lead_contacts mappingPrimary_contact_party_id and contact_party_idCode is from lookup type 'lead_contact_role'
Budget Status	as_sales_leads.budget_status_code	
Lead Score	as_import_interface.Marketing_score	
Lead Status	as_sales_leads.status_code	
Total Budget	as_sales_leads.budget_amount	
Purchase Quantity	as_sales_lead_lines.quantity	

<b>Attribute</b>	<b>Table.Column</b>	<b>Links</b>
Purchase Amount	as_sales_lead_lines. budget_amount	From as_sales_leads link to as_sales_lead_lines mappingsales_lead_id and sales_lead_id
Response Channel	as_sales_leads. vehicle_response_code	Seeded data from lookuptype 'vehicle response code'
Project	As_sales_leads. parent_project	
Qualify Flag	as_sales_leads. qualified_flag	
Lead Grading/Rating	as_sales_leads. lead_rank_id to as_sales_ranks_b.rank_id	
Sales Channel	as_sales_leads. channel_code	Seeded data from lookuptype 'sales channel'
Creation Date	as_sales_leads. creation_date	
State	hz_locations. state	From hz_party_sites link to as_sales_leads mappingParty_site_id and address_id  From hz_locations link to hz_party_sites mappingLocation_id and location_id
Primary Contact Phone Specified	as_sales_lead_contacts.phone_id	links to as_sales_leads.phone_id
Customer/Accoun Type	Hz_code_assugnments.class_co de	Links as_sales_leads.customer_id to hz_code_assignments for owner_table_id and owner_table_name = 'HZ_PARTIES'
Country	hz_locations.country	From as_sales_leads link to hz_party_sites mappingAddress_id and party_site_id  From hz_party_sites link to hz_locations mappingLocation_id with location_id
Campaign	as_sales_lead. source_promotion_id	Links to ams_source_codes.source_code_id
Customer Name	Hz_parties.party_name	Links as_sales_leads.customer_id to hz_parties.party_id
Customer Address Specified	Hz_party_sites.party_site_id	Links as_sales_leads.address_id to hz_party_sites.party_site_id for the customer party_id
Product Interest	As_sales_lead_lines.interest_typ es_id + primary_interest_code_id + secondary_interest_code_id	Links to as_interest_types and as_interest_codes .

Attribute	Table.Column	Links
Additional Channel Offering	Pv_attribute_codes_vl.description for attribute 'Additional channel offering'	Pv_lead_pss_lines.attr_code
Total Amount	sum(as_sales_lead_lines.budget_amount)	From as_sales_lead_lines link to as_sales_leads mappingSales_lead_id and sales_lead_id

## 4.9.10 Migrating Lead Engines from 11.5.7 to 11.5.8

### 4.9.10.1 Migrating to the New Qualification Rules Engine

In 11.5.7, the lead qualification process used the following profile options:

- OS: Project name required (AS\_SALES\_LEAD\_PROJECT\_NAME\_REQ)
- OS: Sales channel required (AS\_SALES\_LEAD\_CHANNEL\_REQ)
- OS: Decision time frame required (AS\_SALES\_LEAD\_TIME\_FRAME\_REQ)
- OS: Total budget amount required (AS\_SALES\_LEAD\_TOTAL\_BUDGET\_REQ)
- OS: Contact phone required (AS\_SALES\_LEAD\_CONTACT\_PHONE\_REQ)
- OS: Contact role required (AS\_SALES\_LEAD\_CONTACT\_ROLE\_REQ)
- OS: Budget status required (AS\_SALES\_LEAD\_BUDGET\_STATUS\_REQ)
- OS: Campaign code required (AS\_SALES\_LEAD\_CAMPAGN\_CODE\_REQ)

This section discusses how to map these options to rules in the new Rules Engine.

#### About Input Filters

One new qualification rule can comprise the entire existing profile option set (above); however, the new Rules Engine can define multiple qualification rules to accommodate different business scenarios and segmentation, via Input Filters.

Each rule requires at least one Input Filter. On evaluation, Input Filters are used to select rules appropriate for each lead. This groups rules into business-specific sets for lead evaluation. For example, country-specific, product-specific, or campaign-specific. This enables you to create multiple sets of rules, each of which applies to different leads.

Among the profile options currently supported, only Campaign Code is an Input Filter in the new Qualification Engine. Therefore, if you have set the profile "OS: Campaign code required" to "Yes", you can add the attribute "Campaign" as a rule

Input Filter, and set the operator to "Is Not Null". This way, all leads with a Campaign Code will use the rule.

If you do not use the profile "OS: Campaign code required", you must still use at least one Input Filter in your rule; otherwise, the rule will not be utilized. This can be either a specific Product or Country, or a check to ensure a field is not null. Or, if you wish a given rule to apply to ALL leads, you can select the attribute "Creation Date" as an Input Filter, and set the operator to "Is Not Null" -- this ensures the rule will always be used for each lead, for example, as a catch all rule.

### Mapping Profile Options to Rule Engine Conditions

Each of the profile options is supported in the new Leads Rules Engine as Rule Conditions.

To map the profile options directly to conditions, you can create one qualification rule that sets each of the qualifiers you require to <Qualifier> 'Is Not Null'.

For Rule Conditions, map the options as follows:

- If you set the profile "OS: Project name required" to "Yes", set the attribute "Project" with operator "Is Not Null".
- If you set the profile "OS: Sales channel required" to "Yes", set the attribute "Sales Channel" with operator "Is Not Null".
- If you set the profile "OS: Decision time frame required" to "Yes", set the attribute "Purchase Timeframe" with operator "Is Not Null".
- If you set the profile "OS: Total budget amount required" to "Yes", set the attribute "Total Budget" with operator "Is Not Null".
- If you set the profile "OS: Contact phone required" to "Yes", set the attribute "Contact Phone" with operator "Is Not Null".
- If you set the profile "OS: Contact role required" to "Yes", set the attribute "Contact Role" with operator "Is Not Null".

If you set the profile "OS: Budget status required" to "Yes", set the attributes "Budget Status" with operator "Is Not Null".

Example:

Qualification Rule	Operator	Value
Name		Default Qualification Rule
Precedence		100

Qualification Rule	Operator	Value
Status		Active
Currency Code		US Dollar
Input Filter = Campaign	Is Not Null	
Criterion=		
Sales Channel	Is Not Null	
Purchase Time frame	Is Not Null	
Total Budget	Is Not Null	
Budget Status	Is Not Null	

The above example maps the new Qualification Engine to the 11.5.7 profile options. However, the new engine can define more flexible qualification conditions as well, using other operators, and other values.

Example:

Qualification Rule	Operator	Value
Name		New Qualification Rule
Precedence		100
Status		Active
Currency Code		US Dollar
Input Filter = Campaign	Equals	Ebusiness
Criterion =		
Purchase Timeframe	Equals	1 to 3 months
Total Budget	Greater than	10,000
Budget Status	Equals	Approved

#### 4.9.10.2 Migrating to the New Rating Rules Engine

In 11.5.7, the lead ranking process uses a scorecard with the following qualifiers:

- Organization
- Contact Role

- Timeframe
- Campaign Code
- Sales Channel
- Budget Status
- Budget Amount

These Name /value pairs are set to scores, which are then mapped to grades in the Rank Mapping.

This section discusses how to map a scorecard to rules in the new Rules Engine.

### **About Grading**

Mapping the Scorecard and Rank Mapping framework to the new Grading Rules Engine is more complicated than qualification rules, because the new rules map conditions directly to grades (i.e., no score total is used). This enables the user to map exact fields, and their different values, to grades, without merging different field/value logic accrued into a final score.

(For example, a given lead can score low points on some fields, and high points on other fields. A total score merges this data, and therefore loses information about the relative weight of each field, which fields were missing, which answers were key, etc. Or, a second given lead can score one high point but have low scores on all key fields, and derive a total high score. Again, the final total loses all distinctions.

The method in the new Rules Engine maps different fields, and their conditions, directly to grades. This way, each field and its value is controlled by the user in terms of its weight, its relative relevance to other fields, if it can be null or not, and so on. )

For this reason, scores and their ranks cannot be directly mapped to rules, as more specific field grading logic is encapsulated in a rule.

Note: A Score attribute (from the Imports Interface table: Marketing\_Score) is still supported in the new Rules Engine. This imported score can be mapped to grades in the rules engine along with any other fields. However, the score is not generated by the engine itself, and must be imported externally.)

## About Input Filters

Note that one Rating rule can comprise the entire set of existing scorecard qualifiers; however, the new Rules Engine can also define multiple rules for different business scenarios and segmentation, via Input Filters.

As above, each rating rule requires at least one Input Filter. On evaluation, Input Filters are used to select rules appropriate for each lead. For example, country-specific, product-specific, or campaign-specific. These therefore enable the user to create multiple sets of grading rules, each of which applies to different leads.

Among the qualifiers currently supported, only Campaign Code is an Input Filter in the new Rating Engine. If you use the Campaign Code qualifier in your scorecard, you can add the attribute "Campaign" as a rule Input Filter, and set the operator to "Equals", and value to the value(s) you currently support. This way, all leads of the specified campaign will be processed by this rule.

Note: You can add multiple campaigns per rule, if these all use the same conditions and precedence etc.; or you can create multiple rules for different campaigns, each of which uses different grading logic.

If you do not use the Campaign qualifier, you must still use at least one Input Filter in your grading rule; otherwise, the rule will not be utilized. This can be either a specific Product or Country, or a check to ensure a field is not null. If you wish a given rule to apply to ALL leads, you can select the attribute "Creation Date" as an Input Filter, and set the operator to "Is Not Null" -- this ensures the rule will always be used for each lead, for example, as a catch all rule.

## Mapping Score Qualifiers to Rule Conditions

Each of the Scorecard qualifiers is supported in the new Grading Rules Engine as Conditions.

To map the scorecard options directly to rule conditions:

1. If you use the scorecard qualifier Organization, set the grading rule attribute "Customer Name" with operator "Equals", and value the same as you used in the scorecard.
2. If you use the scorecard qualifier Contact Role, set the grading rule attribute "Contact Role" with operator "Equals", and value the same as you used in the scorecard.
3. If you use the scorecard qualifier Timeframe, set the grading rule attribute "Purchase Timeframe" with operator "Equals", and value the same as you used in the scorecard.

4. If you use the scorecard qualifier Sales Channel, set the grading rule attribute "Sales Channel" with operator "Equals", and value the same as you used in the scorecard.
5. If you use the scorecard qualifier Budget Status, set the grading rule attribute "Budget Status" with operator "Equals", and value the same as you used in the scorecard.
6. If you use the scorecard qualifier Budget Amount, set the grading rule attribute "Total Budget" with operator "Equals", and value the same as you used in the scorecard.

To map a Scorecard and its Rank Mapping to the new engine, you need to create a rule, and then translate the name/value pairs and their scores to the rule's sub-rules. You define the outcome, or grade, of each sub-rule by the different field combinations you want to support.

Example:

For example, if you set up a scorecard as:

Qualifier	Score	Value
Organization	50	XYZ Company
Contact Role	20	Decision Maker
Time Frame	30	1-3 months
Campaign	20	Ebusiness
Sales Channel	20	Indirect
Budget Status	10	Approved
Budget Amount	50	10,000 to 50,000

And your rank mapping is:

Min. Points	Max. Points	Rank
1	49	C
50	99	B
100	149	A
150	200	A+

You could set up one Grading rule in the new engine as:

<b>Grading Rule</b>	<b>Operator</b>	<b>Value</b>
Name		New Grading Rule
Precedence		100
Status		Active
Currency Code		US Dollar
Input Filter		
Campaign (was 20)	Equals	Ebusiness
Criterion Sub Rule 1 (A+)		
Customer Name (was 50)	Equals	Decision Maker
Total Budget (was 50)	Between	10,000-50,000
Purchase Timeframe (was 30)	Equals	1-3 months
(total = 150)		
Criterion Sub Rule 2 (A)		
Purchase Timeframe (was 30)	Equals	1-3 months
Sales Channel (was 20)	Equals	Indirect
Total Budget (was 50)	Between	10,000-50,000
(total = 120)		
Criterion Sub Rule 3 (B)		
Budget Status (was 10)	Equals	Approved
Contact Role (was 20)	Equals	Decision Maker
Purchase Timeframe (was 30)	Equals	1-3 months
(total = 80)		

The table above is just one example. There are multiple ways to translate a scorecard into different grade. The following table also shows valid rules for a the above scorecard.

<b>Rule</b>	<b>Operator</b>	<b>Value</b>
Name		New Grading Rule
Precedence		100

Rule	Operator	Value
Status		Active
Currency Code		US Dollar
Input Filter		
Campaign (was 20)	Equals	Ebusiness
Criterion Sub Rule 1 (A+)		
Contact Role (was 20)	Equals	Decision Maker
Total Budget (was 50)	Between	10,000-50,000
Purchase Timeframe (was 30)	Equals	1-3 months
Sales Channel (was 20)	Equals	Indirect
Budget Status (was 10)	Equals	Approved
(total = 150)		
Criterion Sub Rule 2 (A)		
Contact Role (was 20)	Equals	Decision Maker
Budget Amount (was 50)	Between	10,000 to 50,000
Budget Status (was 10)	Equals	Approved
(total = 120)		

#### 4.9.10.3 Migrating to the New Channel Selection Engine

This is a new engine in 115.8. Please define new rules as specified in [Section 4.9.4, "Setting Up Lead Rules Engine"](#), above.

### 4.9.11 Administrative Operational Reports

The Administration Leads module comprises 3 seeded reports for monitoring leads operations:

- **Imports Records Manager:** These reports enable you to search all records imported as leads, to find import exceptions and recover from errors, and to track the number of leads imported by different sources.

For details, see [Section 4.10.8, "Checking for and Correcting Errors"](#) on page 4-97.

- **Lead Processing Reports:** These reports enable you to track all winning executions of the engine, per lead, to perform day-to-day monitoring of the engine, its input, and its output.

The reports store each Qualification, Grading, and Channel processing state per lead, and the winning rule, or default outcome. You can search the reports by multiple lead parameters, including Processing Stage, Lead Name, Lead Campaign Code (and Schedule), Lead Country, Lead Product, Lead Creation Date, and Lead Result. In addition, you can track each execution against Lead Status (outcome), so you can evaluate the effectiveness of rule evaluation against the actual lead lifecycle.

- **Rule Diagnostic Reports.** These reports introduce a new diagnostic tool, which enables you to view all rule engine executions, including leads which failed to find matching Input Filters, failed to match criteria of rules, or passed rule selection but did not win (in tie breaking). You use these reports to analyze problems and trouble shoot rule configurations.

You can search the repository by multiple parameters, including Rule Type and Name, Lead Name or Status, and Lead Creation Date and Evaluation Date.

## 4.10 Importing Leads

### **Applies to: Sales Online, TeleSales**

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

This topic covers:

- Lead import overview.
- New features. See [Section 4.10.2, "New in This Release"](#) on page 4-91.
- Fixes to known past problems. See [Section 4.10.3, "Fixes to Known Problems"](#) on page 4-92.
- Overview of the lead import steps. [Section 4.10.4, "Procedure Overview"](#) on page 4-92.
- What you must set up before importing leads. See [Section 4.10.5, "Setting Up Lead Import"](#) on page 4-92.
- Lead import procedure. See [Section 4.10.6, "Importing Leads from a File or by Populating the Lead Interface Table"](#) on page 4-94.
- Sample data file to give you an idea of import file setup. See [Section 4.10.7, "Sample Data File"](#) on page 4-96.

- Correcting any errors from the lead import procedure. See [Section 4.10.8, "Checking for and Correcting Errors"](#) on page 4-97.
- You can view the structure of the lead import flat file and lead import tables in [Section 4.10.9, "Flat File and Import Table Structure"](#) on page 4-99.
- If you are importing data in flexfields see [Section 4.10.10, "How to Import Flexfields"](#) on page 4-123.
- If you wish to customize the lead import program see [Section 4.10.11, "Understanding and Extending the Lead Import Program"](#) on page 4-124.
- If you wish to set up custom duplicate lead checking, see [Section 4.10.12, "User Hook for Customizing Duplicate Lead Checking"](#) on page 4-125.
- For an understanding of how the lead import program checks for duplicate information in your database, see [Section 4.10.13, "How Lead Import Checks for Duplicates"](#) on page 4-127.
- To understand the structure of the lead import error table see [Section 4.10.15, "Lead Import Errors Table Structure"](#) on page 4-142.
- For a list of functions that generate sequences used by the import program see [Section 4.10.16, "Sequence Generators"](#) on page 4-143.
- For a schematic overview of the import process see [Section 4.10.17, "Database Design"](#) on page 4-144.

## 4.10.1 Lead Import Overview

Lead import loads data either from a flat file, using the Oracle SQL Loader, or from another source, using a custom program, into the following tables:

- `AS_IMPORT_INTERFACE` - Interface table that holds sales lead, customer, address, and contact information to be imported.
- `AS_IMP_LINES_INTERFACE` - Interface table that holds lead lines to be imported.
- `AS_IMP_CNT_ROL_INTERFACE` - Interface table that holds contact role information to be imported.
- `AS_IMP_CNT_PNT_INTERFACE` - Interface table that holds contact points information to be imported.
- `AS_IMP_SL_FLEX` - Table to store the flex fields values.

Running the Lead Import concurrent program loads the data into:

- TCA (customer) tables
- Oracle Sales tables
- AS\_LEAD\_IMPORT\_ERRORS

## 4.10.2 New in This Release

Prior to this release, lead import had only the following tables: AS\_IMPORT\_INTERFACE and AS\_IMP\_SL\_FLEX.

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

These new tables were created to overcome these limitations: AS\_IMP\_LINES\_INTERFACE, AS\_IMP\_CNT\_ROL\_INTERFACE, and AS\_IMP\_CNT\_PNT\_INTERFACE.

These changes are backward-compatible. This means that you can continue to populate interest\_type\_id\_1 ~ 5 columns and other columns in AS\_IMPORT\_INTERFACE and lead import program will import them to Oracle Sales.

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

If you populate purchase items columns in AS\_IMPORT\_INTERFACE and also in the AS\_IMP\_LINES\_INTERFACE, the data in both tables will be imported.

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

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

### 4.10.3 Fixes to Known Problems

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

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

### 4.10.4 Procedure Overview

Importing leads into the database requires you to:

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

See [Section 4.10.13, "How Lead Import Checks for Duplicates"](#) on page 4-127 for information on duplicate checking.

### 4.10.5 Setting Up Lead Import

Use this procedure to set up lead import.

#### Prerequisites

You must set up leads, including required lead system profile options as described in [Section 4.9, "Setting Up Lead Management"](#).

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

#### Steps

1. Set up system profile options for lead import.

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

- HZ: Key Word Count

Default setting: 5

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

- HZ: Address Key Length  
Default setting: 15
- HZ: Postal Code Key Length  
Default setting: 5
- HZ Cleanse Fuzzy Key  
Default setting: 5

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

- OS: Default Resource ID Used for Sales Lead Assignment  
Set this system profile option to the resource who is to handle any leads that are not assigned to any current territory.

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

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- OS: Auto Assigning from Lead Import  
Default setting: Y
  - OS: Auto Ranking from Lead Import  
Default setting: Y
2. Under the Oracle Sales Administrator responsibility, navigate to **CRM Foundation > Territory Manager > Territory Administration** and create your territories inside the Oracle Sales and TeleSales node on the territory setup form. Refer to the Implementing Territory Manager section of the *Oracle CRM Application Foundation Implementation Guide*.
  3. Successfully run the Generate Territory Packages concurrent program. This concurrent program builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import

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

4. Set up word replacement rules by logging in under the Receivables Manager Responsibility and navigating to **Setup > Word Replacement Rules**.
5. If you have changed any of the key-related profiles or word replacement rules or if this is the first time you are carrying out this procedure, then:
  - a. Switch to the Receivables Manager responsibility.
  - b. If you have changed the customer related key system profiles or this is the first time you are implementing the application, then generate the customer key by running the Generate Keys for Fuzzy Match concurrent program with the Table parameter set to Name and the New Rows Only parameter set to No.
  - c. If you have changed any of the address-related key system profiles or this is the first time you are implementing the application, then generate the address key by running the Generate Keys for Fuzzy Match concurrent program with the Table parameter set to Address and the New Rows Only parameter set to No.

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

Use this procedure to import leads into the database from a flat file or by entering data directly into a lead interface table. The lead import assigns the leads automatically to the appropriate agent or salesperson via the Oracle E-Business Suite's Territory Manager module.

##### Prerequisites

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

##### Steps

1. If you wish to import leads from a file then:
  - a. FTP the tilde-delimited file with lead data to a directory on the server. The file must have a file name with the extension `.dat` and the structure

described in [Section 4.10.9, "Flat File and Import Table Structure"](#) on page 4-99. A sample file with one data line is listed in [Section 4.10.7, "Sample Data File"](#) on page 4-96.

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

---

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

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

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

- c. Log in under the Oracle TeleSales Administration responsibility.
- d. Run the OTS: Load Sales Lead Interface Table from Flat File concurrent program. This program populates the lead interface table (`AS_IMPORT_INTERFACE`). To run the program you must know the absolute path to the `P_DATAFILE` you created in the previous step.
2. Populate any flexfields data into the table `AS_IMP_SL_FLEX`. See [Section 4.10.10, "How to Import Flexfields"](#) on page 4-123.
3. After loading leads into the lead interface table, run the Lead Import concurrent program using the following parameters (See [Section 4.10.11, "Understanding and Extending the Lead Import Program"](#) on page 4-124 for an explanation of what the lead import program does and how to extend it using built-in user hooks.)

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

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

- After the Lead Import program has run successfully, you are ready to [check for and correct any errors](#).

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

---



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### 4.10.7 Sample Data File

Below is a sample data file for loading AS\_IMPORT\_INTERFACE. This example contains only one line of data.

```

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

## 4.10.8 Checking for and Correcting Errors

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

The following table describes status and descriptions for lead import errors.

Status	Description
Complete	All records complete/successful.
Incomplete - Errors Found	One or more records complete/successful with one or more errors.
Incomplete - Duplicates Found	One or more records complete/successful with one or more duplicates.
Incomplete - Duplicates and Errors Found	One or more records complete/successful with one or more duplicates AND one or more errors found.
Error	All records error.
Duplicate	All records duplicates.

---



---

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

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### Prerequisite

You must:

- [Import the leads from a flat file](#) or populate the interface table.
- Run the Lead Import concurrent program.

### Responsibility

Oracle Sales Online Super User

### Navigation

Administration > Leads > Import Records Manager

## Steps

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

The page refreshes, listing the errors found during import.

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

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

6. Depending on the error, click on one of the two links:
  - **Organization:** For errors with customer fields.
  - **Lead:** For errors relating to lead information.
  - **Errors:** This link is not used from this page. It is designed to take you back to this page from other pages.
7. If you are correcting errors with customer fields and you clicked **Organization**, then:

The Organization Detail page appears.

- a. Make the correction suggested by the error message.
- b. Change the Load Status for the record to New.

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---

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

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

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---

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

---

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- d. Click **Return** or the ASF\_ERRORS link to return to the Error Detail page where you can view another error.
8. If you are correcting errors with lead fields and you clicked **Lead**, then:

The Lead Detail page appears.

- a. Make the correction suggested by the error message.
- b. Change the Load Status for the record to New.

---

---

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

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- c. Click **Update** to save your correction.
  - d. Click **Return** or the ASF\_ERRORS link to return to the Error Detail page where you can view another error.
  - e. Click **Save** on the toolbar.
9. Repeat this procedure for each record with an error.
  10. After the concurrent program has completed successfully, check to see if there are any remaining errors by running another Query Enter / Query Run query on Load Status of Error.

---

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

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#### 4.10.9 Flat File and Import Table Structure

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

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

You must provide valid values to these columns. This means running SQL\*Plus queries to obtain some of the values required by this table. The columns you

must query and sample queries for your use are listed in the Valid Values column.

- Lead import records can contain null fields except for the required fields noted below.

If you are importing leads and have flexfield set up in your application you must also populate the AS\_IMP\_SL\_FLEX table.

The following table lists all the columns that are present in both the AS\_IMPORT\_INTERFACE table and in the control file. The order of these fields is also the same in both. In addition to the fields listed here, the table also includes additional columns most of which are obsolete. See [Additional Columns in the Interface Table Only](#) on page 4-117.

### Columns Present in Both the Interface Table and Control File

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMPORT_INTERFACE_ID	Y	NUMBER	select as_import_interface_s.n extval from sys.dual		
LAST_UPDATE_DATE	Y	DATE		] If using "Load Sales Lead	
LAST_UPDATED_BY	Y	NUMBER		] Interface Table from Flat File	"
CREATION_DATE	Y	DATE		] to load data, loader will	
CREATED_BY	Y	NUMBER		] populate these columns with	
LAST_UPDATE_LOGIN	Y	NUMBER		] sysdate(date) and -1(user id)	
LOAD_TYPE		VARCHAR2 (20)	'LEAD_LOAD'		
LOAD_DATE		DATE			
LOAD_STATUS	Y	VARCHAR2 (20)	select lookup_code from as_lookups where lookup_type='LOAD_STATUS'	The value should be 'NEW' before importing. The value will be changed to 'SUCCESS' if successful imported, 'ERROR' if not.	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
CUSTOMER_NAME	Y	VARCHAR2 (255)			HZ_PARTIES.party_name
COUNTRY		VARCHAR2 (60)	select territory_code from fnd_territories_vl	If country is supplied then address1 needs to be supplied and vice-versa.	HZ_LOCATIONS.country
ADDRESS1		VARCHAR2 (240)		Country and address1 are required for creating location, party site and party site uses	HZ_LOCATIONS.address1
ADDRESS2		VARCHAR2 (240)			HZ_LOCATIONS.address2
ADDRESS3		VARCHAR2 (240)			HZ_LOCATIONS.address3
ADDRESS4		VARCHAR2 (240)			HZ_LOCATIONS.address4
CITY		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_valuefrom ar_location_values where location_segment_qualifier = 'CITY'		HZ_LOCATIONS.city
POSTAL_CODE		VARCHAR2 (60)	select min(p.from_postal_code), max(p.to_postal_code) from ar_postal_code_ranges_v p, ar_location_values a where p.location_segment_id = a.location_segment_id and a.location_segment_qualifier    " = 'CITY' and a.location_segment_value like 'X%'		HZ_LOCATIONS.postal_code

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
STATE		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'STATE'		HZ_LOCATIONS.state
PROVINCE		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'PROVINCE'		HZ_LOCATIONS.province
COUNTY		VARCHAR2 (60)	select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'COUNTY'		HZ_LOCATIONS.county
SIC_CODE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = '1987 SIC' and enabled_flag = 'Y'	If given, then SIC_CODE_TYPE must be provided too.	HZ_PARTIES.sic_code
ANALYSIS_FY		VARCHAR2 (5)		Analysis physical year	HZ_PARTIES.analysis_fy
CUSTOMER_CATEGORY_CODE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = 'CUSTOMER_CATEGORY' and enabled_flag='Y'		HZ_PARTIES.category_code
FISCAL_YEAREND_MONTH		VARCHAR2 (30)		free text format	HZ_PARTIES.fiscal_year_end_month
NUM_OF_EMPLOYEES		NUMBER(15)			HZ_PARTIES.employees_total
POTENTIAL_REVENUE_CURR_FY		NUMBER			HZ_PARTIES.curr_fy_potential_revenue

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
POTENTIAL_REVENUE_NEXT_FY		NUMBER			HZ_PARTIES.next_fy_potential_revenue
CUSTOMER_RANK		VARCHAR2 (30)			HZ_ORG_CONTACT_ROLES.role_type & AS_SALES_LEAD_CONTACTS.rank
TAX_REFERENCE		VARCHAR2 (50)			HZ_PARTIES.tax_reference
YEAR_ESTABLISHED		NUMBER(4)			HZ_PARTIES.year_established
ADDR_DO_NOT_MAIL_FLAG		VARCHAR2 (1)		If set to 'Y' no mails to customer site will be sent	
SEX_CODE		VARCHAR2 (30)			
SALUTATION		VARCHAR2 (60)	ar_lookups.lookup_code where lookup_type = 'CONTACT_TITLE' and enabled_flag = 'Y'	This column is for terms used while greeting the contact. Like Her Highness.	HZ_PARTIES.person_academic_title & HZ_PARTIES.person_title
TITLE		VARCHAR2 (30)			HZ_PARTIES.person_pre_name_adjunct
LAST_NAME		VARCHAR2 (50)		] Last name and first name are	HZ_PARTIES.person_last_name
FIRST_NAME		VARCHAR2 (40)		] required for creating contact	HZ_PARTIES.person_first_name
MIDDLE_INITIAL		VARCHAR2 (10)			HZ_PARTIES.person_middle_name
JOB_TITLE		VARCHAR2 (50)			HZ_ORG_CONTACTS.job_title
JOB_TITLE_CODE		VARCHAR2 (30)	ar_lookups.lookup_code where lookup_type = 'RESPONSIBILITY' and enabled_flag = 'Y'	Stores the job title code	HZ_ORG_CONTACTS.job_title_code
MAIL_STOP		VARCHAR2 (60)			HZ_ORG_CONTACTS.mail_stop
PHONE_NUMBER		VARCHAR2 (25)			HZ_CONTACT_POINTS.phone_number

## Importing Leads

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PHONE_TYPE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = 'PHONE_LINE_TYPE' and enabled_flag = 'Y'		HZ_CONTACT_POINT S.phone_line_type
AREA_CODE		VARCHAR2 (10)			HZ_CONTACT_POINT S.phone_area_code
EXTENSION		VARCHAR2 (20)			HZ_CONTACT_POINT S.phone_extension
FAX_NUMBER		VARCHAR2 (25)			HZ_CONTACT_POINT S.phone_number
FAX_AREA_CODE		VARCHAR2 (10)			HZ_CONTACT_POINT S.phone_area_code
URL		VARCHAR2 (2000)			HZ_CONTACT_POINT S.url
EMAIL_ADDRESS		VARCHAR2 (240)			HZ_CONTACT_POINT S.email_address
CONT_DO_NOT_MAIL_FLAG		VARCHAR2 (1)	'Y' or 'N'	If set to 'Y' no mails will be sent to contact	HZ_CONTACT_RESTRICTIONS
DO_NOT_EMAIL_FLAG		VARCHAR2 (1)	'Y' or 'N'	If 'Y' then no emails sent to Contact.	HZ_CONTACT_RESTRICTIONS
DO_NOT_FAX_FLAG		VARCHAR2 (1)	'Y' or 'N'	If 'Y' then no fax sent to Contact.	HZ_CONTACT_RESTRICTIONS
DO_NOT_PHONE_FLAG		VARCHAR2 (1)	'Y' or 'N'	If 'Y' then no phone calls to Contact.	HZ_CONTACT_RESTRICTIONS
STATUS_CODE		VARCHAR2 (30)	select status_code from as_statuses_b where lead_flag = 'Y' and enabled_flag = 'Y' and usage_indicator in ('ALL','OS')		AS_SALES_LEADS.stat us_code
CONTACT_ROLE_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'LEAD_CONTACT_ROLE'		AS_SALES_LEADS.con tact_role_code & AS_SALES_LEAD_CO NTACTS.contact_role_c ode
CHANNEL_CODE		VARCHAR2 (30)	select sales_channel_code from aso_i_sales_channels_v		AS_SALES_LEADS.cha nnel_code
BUDGET_AMOUNT		NUMBER			AS_SALES_LEADS.bud get_amount

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
BUDGET_STATUS_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'BUDGET_STATUS'		AS_SALES_LEADS.budget_status_code
CURRENCY_CODE		VARCHAR2 (15)	select currency_code from fnd_currencies where enabled_flag = 'Y'		AS_SALES_LEADS.currency_code
DECISION_TIMEFRAME_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'DECISION_TIMEFRAME'		AS_SALES_LEADS.decision_timeframe_code
CLOSE_REASON		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'CLOSE_REASON'		AS_SALES_LEADS.close_reason
PARENT_PROJECT		VARCHAR2 (80)			AS_SALES_LEADS.parent_project
DESCRIPTION		VARCHAR2 (2000)			AS_SALES_LEADS.description
VEHICLE_RESPONSE_CODE		VARCHAR2 (30)	select lookup_code from as_lookups where lookup_type = 'VEHICLE_RESPONSE_CODE' and enabled_flag = 'Y'		AS_SALES_LEADS.vehicle_response_code
INTEREST_TYPE_ID_1		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.interest_type_id
PRIMARY_INTEREST_CODE_ID_1		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.primary_interest_code_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SECONDARY_INTEREST_CODE_ID_1		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.secondary_interest_code_id
INVENTORY_ITEM_ID_1		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LIN ES.inventory_item_id
ORGANIZATION_ID_1		NUMBER			AS_SALES_LEAD_LIN ES.organization_id
UOM_CODE_1		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LIN ES.uom_code
QUANTITY_1		NUMBER			AS_SALES_LEAD_LIN ES.quantity
BUDGET_AMOUNT_1		NUMBER			AS_SALES_LEAD_LIN ES.budget_amount
SOURCE_PROMOTION_ID_1		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'		AS_SALES_LEAD_LIN ES.source_promotion_id
OFFER_ID_1		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = 'OFFR'		AS_SALES_LEAD_LIN ES.offer_id
INTEREST_TYPE_ID_2		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.interest_type_id
PRIMARY_INTEREST_CODE_ID_2		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.primary_interest_code_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SECONDARY_INTEREST_CODE_ID_2		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_2		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_2		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_2		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_2		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_2		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_2		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'		AS_SALES_LEAD_LINES.source_promotion_id
OFFER_ID_2		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = 'OFFR'		AS_SALES_LEAD_LINES.offer_id
INTEREST_TYPE_ID_3		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y'		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_3		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LINES.primary_interest_code_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SECONDARY_INTEREST_CODE_ID_3		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.secondary_interest_code_id
INVENTORY_ITEM_ID_3		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LIN ES.inventory_item_id
ORGANIZATION_ID_3		NUMBER			AS_SALES_LEAD_LIN ES.organization_id
UOM_CODE_3		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LIN ES.uom_code
QUANTITY_3		NUMBER			AS_SALES_LEAD_LIN ES.quantity
BUDGET_AMOUNT_3		NUMBER			AS_SALES_LEAD_LIN ES.budget_amount
SOURCE_PROMOTION_ID_3		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'		AS_SALES_LEAD_LIN ES.source_promotion_id
OFFER_ID_3		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = 'OFFR'		AS_SALES_LEAD_LIN ES.offer_id
INTEREST_TYPE_ID_4		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.interest_type_id
PRIMARY_INTEREST_CODE_ID_4		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.primary_interest_code_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SECONDARY_INTEREST_CODE_ID_4		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LINES.secondary_interest_code_id
INVENTORY_ITEM_ID_4		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.inventory_item_id
ORGANIZATION_ID_4		NUMBER			AS_SALES_LEAD_LINES.organization_id
UOM_CODE_4		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.uom_code
QUANTITY_4		NUMBER			AS_SALES_LEAD_LINES.quantity
BUDGET_AMOUNT_4		NUMBER			AS_SALES_LEAD_LINES.budget_amount
SOURCE_PROMOTION_ID_4		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'		AS_SALES_LEAD_LINES.source_promotion_id
OFFER_ID_4		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = 'OFFR'		AS_SALES_LEAD_LINES.offer_id
INTEREST_TYPE_ID_5		NUMBER	select interest_type_id FROM as_interest_types_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y'		AS_SALES_LEAD_LINES.interest_type_id
PRIMARY_INTEREST_CODE_ID_5		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LINES.primary_interest_code_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SECONDARY_INTEREST_CODE_ID_5		NUMBER	select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y'		AS_SALES_LEAD_LIN ES.secondary_interest_code_id
INVENTORY_ITEM_ID_5		NUMBER	select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LIN ES.inventory_item_id
ORGANIZATION_ID_5		NUMBER			AS_SALES_LEAD_LIN ES.organization_id
UOM_CODE_5		VARCHAR2 (3)	select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LIN ES.uom_code
QUANTITY_5		NUMBER			AS_SALES_LEAD_LIN ES.quantity
BUDGET_AMOUNT_5		NUMBER			AS_SALES_LEAD_LIN ES.budget_amount
SOURCE_PROMOTION_ID_5		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'		AS_SALES_LEAD_LIN ES.source_promotion_id
OFFER_ID_5		NUMBER	select source_code_id from ams_source_codes where arc_source_code_for = 'OFFR'		AS_SALES_LEAD_LIN ES.offer_id
LEAD_NOTE		VARCHAR2 (2000)		For creating Lead note	
LEAD_RANK_ID		NUMBER(15)	as_sales_lead_rank_vl.rank_id, meaning where enabled_flag = 'Y'	Stores the sales lead rank id. Need not supply if supplied will get validated	AS_SALES_LEADS.lead_rank_id
SOURCE_SYSTEM	Y	VARCHAR2 (250)	select lookup_code from as_lookups where lookup_type = 'SOURCE_SYSTEM' and enabled_flag = 'Y'	Stores the name/tag of the business entity which is populating the leads.	
BATCH_ID		NUMBER(15)	select as_sl_imp_batch_s.nextval from sys.dual	Batch id of the load; if provided, only the records with the same batch_id will be processing	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
ORIG_SYSTEM_REFERENCE		VARCHAR2 (240)		May be populated as <orig_system_code >: <identifier> example: OTN::10100Please note that we'll use this column to find customer_key.	
ORIG_SYSTEM_CODE		VARCHAR2 (30)		Source application code where the lead originated example: OTN	
URGENT_FLAG		VARCHAR2			AS_SALES_LEADS.URGENT_FLAG
ACCEPT_FLAG		VARCHAR2			AS_SALES_LEADS.accept_flag
ASSIGN_DATE		DATE			AS_SALES_LEADS.assign_date
ASSIGN_SALES_GROUP_ID		NUMBER			AS_SALES_LEADS.assign_sales_group_id
ASSIGN_TO_PERSON_ID		NUMBER			AS_SALES_LEADS.assign_to_person_id
ASSIGN_TO_SALESFORCE_ID		NUMBER			AS_SALES_LEADS.assign_to_salesforce_id
AUTO_ASSIGNMENT_TYPE		VARCHAR2			AS_SALES_LEADS.auto_assignment_type
DELETED_FLAG		VARCHAR2			AS_SALES_LEADS.DELETED_FLAG
IMPORT_FLAG		VARCHAR2			AS_SALES_LEADS.IMPORT_FLAG
KEEP_FLAG		VARCHAR2			AS_SALES_LEADS.KEEP_FLAG
PRM_ASSIGNMENT_TYPE		VARCHAR2			AS_SALES_LEADS.PRM_ASSIGNMENT_TYPE
QUALIFIED_FLAG		VARCHAR2			AS_SALES_LEADS.QUALIFIED_FLAG
REJECT_REASON_CODE		VARCHAR2			AS_SALES_LEADS.REJECT_REASON_CODE
SCORECARD_ID		NUMBER			AS_SALES_LEADS.SCORECARD_ID

## Importing Leads

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PRIMARY_CONTACT_FLAG		VARCHAR2			AS_SALES_LEAD_CONTACTS.PRIMARY_CONTACT_FLAG
ADDRESS_EFFECTIVE_DATE		DATE			HZ_LOCATIONS.address_effective_date
ADDRESS_LINES_PHONETIC		VARCHAR2			HZ_LOCATIONS.address_lines_phonetic
ADDRESS_STYLE		VARCHAR2			HZ_LOCATIONS.address_style
CONTENT_SOURCE_TYPE		VARCHAR2	select lookup_code from ar_lookups where lookup_type = 'CONTENT_SOURCE_TYPE' and enabled_flag = 'Y'	This is a mandatory column in HZ_LOCATIONS, but if not given, default it to 'USER_ENTERED'	HZ_LOCATIONS.content_source_type
LOC_DESCRIPTION		VARCHAR2			HZ_LOCATIONS.DESCRPTION
LOC_HIERARCHY_ID		NUMBER			HZ_LOCATIONS.LOC_HIERARCHY_ID
FA_LOCATION_ID		NUMBER			HZ_LOCATIONS.FA_LOCATION_ID
FLOOR		VARCHAR2			HZ_LOCATIONS.FLOOR
HOUSE_NUMBER		VARCHAR2			HZ_LOCATIONS.HOUSE_NUMBER
LANGUAGE		VARCHAR2			HZ_LOCATIONS.LANGUAGE
LOCATION_DIRECTIONS		VARCHAR2			HZ_LOCATIONS.LOCATION_DIRECTIONS
PO_BOX_NUMBER		VARCHAR2			HZ_LOCATIONS.PO_BOX_NUMBER
POSITION		VARCHAR2			HZ_LOCATIONS.POSITION
POSTAL_PLUS4_CODE		VARCHAR2			HZ_LOCATIONS.POSTAL_PLUS4_CODE
SALES_TAX_GEOCODE		VARCHAR2			HZ_LOCATIONS.SALES_TAX_GEOCODE
SALES_TAX_INSIDE_CITY_LIMITS		VARCHAR2			HZ_LOCATIONS.SALES_TAX_INSIDE_CITY_LIMITS

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
SHORT_DESCRIPTION		VARCHAR2			HZ_LOCATIONS.SHORT_DESCRIPTION
STREET		VARCHAR2			HZ_LOCATIONS.STREET
STREET_NUMBER		VARCHAR2			HZ_LOCATIONS.STREET_NUMBER
STREET_SUFFIX		VARCHAR2			HZ_LOCATIONS.STREET_SUFFIX
SUITE		VARCHAR2			HZ_LOCATIONS.SUITE
TIME_ZONE		VARCHAR2			HZ_LOCATIONS.TIME_ZONE
LOC_VALIDATED_FLAG		VARCHAR2			HZ_LOCATIONS.VALIDATED_FLAG
DUNS_NUMBER		NUMBER			HZ_PARTIES.DUNS_NUMBER
GROUP_TYPE		VARCHAR2			HZ_PARTIES.GROUP_TYPE
GSA_INDICATOR_FLAG		VARCHAR2			HZ_PARTIES.GSA_INDICATOR_FLAG
HQ_BRANCH_IND		VARCHAR2	select lookup_code from ar_lookups where lookup_type = 'HQ_BRANCH_IND' and enabled_flag = 'Y'		HZ_PARTIES.HQ_BRANCH_IND
JGZZ_FISCAL_CODE		VARCHAR2			HZ_PARTIES.JGZZ_FISCAL_CODE
KNOWN_AS		VARCHAR2			HZ_PARTIES.KNOWN_AS
KNOWN_AS2		VARCHAR2			HZ_PARTIES.KNOWN_AS2
KNOWN_AS3		VARCHAR2			HZ_PARTIES.KNOWN_AS3
KNOWN_AS4		VARCHAR2			HZ_PARTIES.KNOWN_AS4
KNOWN_AS5		VARCHAR2			HZ_PARTIES.KNOWN_AS5
LANGUAGE_NAME		VARCHAR2			HZ_PARTIES.LANGUAGE_NAME

## Importing Leads

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
LAST_ORDERED_DATE		DATE			HZ_PARTIES.LAST_ORDERED_DATE
MISSION_STATEMENT		VARCHAR2			HZ_PARTIES.MISSION_STATEMENT
ORGANIZATION_NAME_PHONETIC		VARCHAR2			HZ_PARTIES.ORGANIZATION_NAME_PHONETIC
PARTY_NUMBER		VARCHAR2			HZ_PARTIES.PARTY_NUMBER
PERSON_FIRST_NAME_PHONETIC		VARCHAR2			HZ_PARTIES.PERSON_FIRST_NAME_PHONETIC
PERSON_IDEN_TYPE		VARCHAR2			HZ_PARTIES.PERSON_IDEN_TYPE
PERSON_IDENTIFIER		VARCHAR2			HZ_PARTIES.PERSON_IDENTIFIER
PERSON_LAST_NAME_PHONETIC		VARCHAR2			HZ_PARTIES.PERSON_LAST_NAME_PHONETIC
PERSON_NAME_SUFFIX		VARCHAR2			HZ_PARTIES.PERSON_NAME_SUFFIX
PERSON_PREVIOUS_LAST_NAME		VARCHAR2			HZ_PARTIES.PERSON_PREVIOUS_LAST_NAME
PARTY_REFERENCE_USE_FLAG		VARCHAR2			HZ_PARTIES.reference_use_flag
SIC_CODE_TYPE		VARCHAR2	select lookup_code from ar_lookups where lookup_type = 'SIC_CODE_TYPE' and enabled_flag = 'Y'		HZ_PARTIES.SIC_CODE_TYPE
TAX_NAME		VARCHAR2			HZ_PARTIES.TAX_NAME
TOTAL_NUM_OF_ORDERS		NUMBER			HZ_PARTIES.TOTAL_NUM_OF_ORDERS
TOTAL_ORDERED_AMOUNT		NUMBER			HZ_PARTIES.TOTAL_ORDERED_AMOUNT
PARTIES_VALIDATE_FLAG		VARCHAR2			HZ_PARTIES.VALIDATED_FLAG
PS_USES_COMMENTS		VARCHAR2			HZ_PARTY_SITE_USES.COMMENTS

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PRIMARY_PER_TYPE		VARCHAR2		'Y' or 'N'	HZ_PARTY_SITE_USES.PRIMARY_PER_TYPE
SITE_USE_TYPE		VARCHAR2	select lookup_code from ar_lookups where lookup_type='PARTY_SITE_USE_CODE' and enabled_flag = 'Y'	This is a mandatory column for HZ_PARTY_SITE_USES. But if not given, it will be defaulted to 'BILL_TO'	HZ_PARTY_SITE_USES.SITE_USE_TYPE
ADDRESSEE		VARCHAR2			HZ_PARTY_SITES.addr essee
MAILSTOP		VARCHAR2			HZ_PARTY_SITES.MAI LSTOP
PARTY_SITE_NAME		VARCHAR2			HZ_PARTY_SITES.PAR TY_SITE_NAME
PARTY_SITE_NUMBE R		VARCHAR2		Can be populated ONLY when profile "HZ: Generate Party Number" set to 'N'	HZ_PARTY_SITES.PAR TY_SITE_NUMBER
ORG_CNT_COMME NTS		VARCHAR2			HZ_ORG_CONTACTS. comments
CONTACT_NUMBER		VARCHAR2			HZ_ORG_CONTACTS. CONTACT_NUMBER
DECISION_MAKER_ FLAG		VARCHAR2			HZ_ORG_CONTACTS. DECISION_MAKER_F LAG
DEPARTMENT		VARCHAR2			HZ_ORG_CONTACTS. DEPARTMENT
DEPARTMENT_COD E		VARCHAR2	select lookup_code from ar_lookups where lookup_type='DEPART MENT_TYPE' and enabled_flag = 'Y'		HZ_ORG_CONTACTS. DEPARTMENT_CODE
RANK		VARCHAR2			HZ_ORG_CONTACTS. RANK
PROMOTION_ID		NUMBER	select source_code_id from ams_source_codes where active_flag = 'Y'	If given, this is used for creating the sales lead header.	AS_SALES_LEADS.sou rce_promotion_id
ROLE_LEVEL		VARCHAR2 (30)			HZ_ORG_CONTACT_ ROLES.role_level

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PRIMARY_CONTACT_PER_ROLE_TYPE		VARCHAR2 (1)		'Y' or 'N'	HZ_ORG_CONTACT_ROLES.primary_contact_per_role_type
CNT_PNT_CONTENT_SOURCE_TYPE		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type = 'CONTENT_SOURCE_TYPE' and enabled_flag = 'Y'	This is a mandatory column in HZ_CONTACT_POINTS, but if not given, default it to 'USER_ENTERED'	'HZ_CONTACT_POINTS.CONTENT_SOURCE_TYPE
PHONE_COUNTRY_CODE		VARCHAR2 (30)			HZ_CONTACT_POINTS.PHONE_COUNTRY_CODE
FAX_COUNTRY_CODE		VARCHAR2 (30)			HZ_CONTACT_POINTS.PHONE_COUNTRY_CODE
PHONE_CALLING_CALENDAR		VARCHAR2 (30)			HZ_CONTACT_POINTS.PHONE_CALLING_CALENDAR
CNT_PNT_TIME_ZONE		NUMBER			HZ_CONTACT_POINTS.TIME_ZONE
RAW_PHONE_NUMBER		VARCHAR2 (60)			HZ_CONTACT_POINTS.RAW_PHONE_NUMBER
EMAIL_FORMAT		VARCHAR2 (30)	select lookup_code from ar_lookups where lookup_type='EMAIL_FORMAT' and enabled_flag = 'Y'		HZ_CONTACT_POINTS.EMAIL_FORMAT
FAX_EXTENSION		VARCHAR2 (20)			HZ_CONTACT_POINTS.phone_extension
ORG_CNT_TITLE		VARCHAR2	select lookup_code from ar_lookups where lookup_type='CONTACT_TITLE' and enabled_flag = 'Y'		HZ_ORG_CONTACTS.title
OFFER_ID		NUMBER	select source_code_id from ams_source_codes where ARC_SOURCE_CODE_FOR = 'OFFR'		AS_SALES_LEAD.offer_id

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PROMOTION_CODE		VARCHAR2 (50)	select source_code from ams_source_codes where active_flag = 'Y'	If given and promotion_id is not provided, then this will be transferred to promotion_id.	AS_SAEELS_LEADS.source_promotion_id
PARTY_ID		NUMBER(15)		Party Id to which the customer info is mapped	
PARTY_SITE_ID		NUMBER(15)		Party Site Id to which the party and location info is mapped	
LOCATION_ID		NUMBER(15)		Location Id to which address info is mapped	
CONTACT_PARTY_ID		NUMBER			HZ_CONTACT_RELATIONSHIPS.subject_id
REL_PARTY_ID		NUMBER(15)		Relationship's party ID to which the relationship is mapped.	AS_SALES_LEAD_CONTACTS.contact_party_id & HZ_CONTACT_POINT_S.owner_table_id & HZ_CONTACT_RESTRICTIONS.subject_id & HZ_CONTACT_POINT_S.owner_table_id

### Additional Columns in the Interface Table Only

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

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
REQUEST_ID		NUMBER			
PROGRAM_APPLICATION_ID		NUMBER		DO NOT POPULATE	
PROGRAM_ID		NUMBER		Concurrent process generated	
PROGRAM_UPDATE_DATE		DATE			

## Importing Leads

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
LOAD_ERROR_MESSAGE		VARCHAR2 (2000)		Currently, not used. To find the error messages, query from as_lead_import_errors	
PHONE_ID		NUMBER		DO NOT POPULATE	AS_SALES_LEAD_CONTACTS.phone_id
SECURITY_GROUP_ID		NUMBER			
NET_WORTH		NUMBER		free text format	
LEAD_NUMBER		VARCHAR2 (30)			AS_SALES_LEADS.lead_number
PRM_SALES_LEAD_TYPE		VARCHAR2 (30)		Partner specific	
PRM_EXEC_SPONSOR_FLAG		VARCHAR2 (1)		Partner specific	
PRM_PRJ_LEAD_IN_PLACE_FLAG		VARCHAR2 (1)		Partner specific	
INCUMBENT_PARTNER_PARTY_ID		NUMBER		Partner specific	
INCUMBENT_PARTNER_RESOURCE_ID		NUMBER		Partner specific	
PRM_IND_CLASSIFICATION_CODE		VARCHAR2 (30)		Partner specific	
PARTY_TYPE		VARCHAR2 (30)		If not given, it will be defaulted to 'ORGANIZATION', if it is given but it's neither 'ORGANIZATION' nor 'PERSON', will raise error	HZ_PARTIES.party_type
SALES_LEAD_ID		NUMBER(15)		<< DO NOT POPULATE >> Sales Lead ID to which the sales lead info is mapped.	AS_SALES_LEADS.sales_lead_id & AS_SALES_LEAD_LINES.sales_lead_id & AS_SALES_LEAD_CONTACTS.sales_lead_id
CUSTOMER_KEY		VARCHAR2 (50)		Stores the customer Key generated	
ADDRESS_KEY		VARCHAR2 (500)		Stores the Address Key generated	
CONTACT_KEY		VARCHAR2(80)		Stores the Contact Key generated	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
NEW_PARTY_FLAG		NUMBER(1)		<< DO NOT POPULATE >> If 1 - party is newly created. If 0, existing party is used.	
NEW_LOC_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - this is a new location. If 0- this is already existing.	
NEW_PS_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - new PS, if 0 - PS already existing	
NEW_REL_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - new relationship. 0- existing Rel	
NEW_CON_FLAG		NUMBER(1)		<< DO NOT POPULATE >> if 1 - new contact, 0- existing Contact	
HZ_PARTYID		NUMBER			AS_SALES_LEAD_CONTACTS.CUSTOMER_ID
HZ_PSID		NUMBER			AS_SALES_LEAD_CONTACTS.ADDRESS_ID
The following columns are obsolete:					
IMP_LIST_HEADER_NUMBER		VARCHAR2 (30)		obsolete	
CUSTOMER_ID		NUMBER(15)		obsolete	
CUSTOMER_NUMBER		VARCHAR2 (30)		obsolete	
CUSTOMER_STATUS		VARCHAR2 (1)		obsolete	
CUSTOMER_TYPE		VARCHAR2 (30)		obsolete	
CUSTOMER_PROSPECT_CODE		VARCHAR2 (30)		obsolete	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
CUSTOMER_CLASS_CODE		VARCHAR2 (30)		obsolete	
SALES_CHANNEL_CODE		VARCHAR2 (30)		obsolete	
CUSTOMER_GROUP_CODE		VARCHAR2 (30)		obsolete	
CUSTOMER_SUBGROUP_CODE		VARCHAR2 (30)		obsolete	
REFERENCE_USAGE		VARCHAR2 (1)		obsolete	
TAX_CODE		VARCHAR2 (50)		obsolete	
THIRD_PARTY_FLAG		VARCHAR2 (1)		obsolete	
COMPETITOR_FLAG		VARCHAR2 (1)		obsolete	
ADDRESS_ID		NUMBER(15)		obsolete	
ADDRESS_STATUS		VARCHAR2 (1)		obsolete	
SITE_CONTACT_ID		NUMBER(15)		obsolete	
PHONE_STATUS		VARCHAR2 (1)		obsolete	
SOURCE_PROMOTION_ID		NUMBER		obsolete	
INITIATING_CONTACT_ID		NUMBER		obsolete	
LEAD_RANK_CODE		VARCHAR2 (30)		obsolete	
STATUS_CODE_1		VARCHAR2 (30)		obsolete	
STATUS_CODE_2		VARCHAR2 (30)		obsolete	
STATUS_CODE_3		VARCHAR2 (30)		obsolete	
STATUS_CODE_4		VARCHAR2 (30)		obsolete	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
STATUS_CODE_5		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_1		VARCHAR2 (2000)		obsolete	
PRIORITY_1		NUMBER(3)		obsolete	
TODO_DATE_1		DATE		obsolete	
TODO_START_TIME_1		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_1		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_2		VARCHAR2 (2000)		obsolete	
PRIORITY_2		NUMBER(3)		obsolete	
TODO_DATE_2		DATE		obsolete	
TODO_START_TIME_2		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_2		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_3		VARCHAR2 (2000)		obsolete	
PRIORITY_3		NUMBER(3)		obsolete	
TODO_DATE_3		DATE		obsolete	
TODO_START_TIME_3		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_3		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_4		VARCHAR2 (2000)		obsolete	
PRIORITY_4		NUMBER(3)		obsolete	
TODO_DATE_4		DATE		obsolete	
TODO_START_TIME_4		VARCHAR2 (5)		obsolete	
ACTIVITY_CODE_4		VARCHAR2 (30)		obsolete	
INTERACTION_NOTES_5		VARCHAR2 (2000)		obsolete	
PRIORITY_5		NUMBER(3)		obsolete	

Column	Req.	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
TODO_DATE_5		DATE		obsolete	
TODO_START_TIME_5		VARCHAR2(5)		obsolete	
ACTIVITY_CODE_5		VARCHAR2(30)		obsolete	
INTERACTION_NOTES_6		VARCHAR2(2000)		obsolete	
PRIORITY_6		NUMBER(3)		obsolete	
TODO_DATE_6		DATE		obsolete	
TODO_START_TIME_6		VARCHAR2(5)		obsolete	
ACTIVITY_CODE_6		VARCHAR2(30)		obsolete	
INTERACTION_NOTES_7		VARCHAR2(2000)		obsolete	
PRIORITY_7		NUMBER(3)		obsolete	
TODO_DATE_7		DATE		obsolete	
TODO_START_TIME_7		VARCHAR2(5)		obsolete	
ACTIVITY_CODE_7		VARCHAR2(30)		obsolete	
INTERACTION_NOTES_8		VARCHAR2(2000)		obsolete	
PRIORITY_8		NUMBER(3)		obsolete	
TODO_DATE_8		DATE		obsolete	
TODO_START_TIME_8		VARCHAR2(5)		obsolete	
ACTIVITY_CODE_8		VARCHAR2(30)		obsolete	
INTERACTION_NOTES_9		VARCHAR2(2000)		obsolete	
PRIORITY_9		NUMBER(3)		obsolete	
TODO_DATE_9		DATE		obsolete	
TODO_START_TIME_9		VARCHAR2(5)		obsolete	
ACTIVITY_CODE_9		VARCHAR2(30)		obsolete	

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

#### 4.10.10 How to Import Flexfields

Use the AS\_IMP\_SL\_FLEX table to store the flexfield values for all the following entities (tables). Entity names are seeded in AS\_LOOKUPS, lookup\_type = 'ENTITY\_NAME'.

- HZ\_PARTIES
- HZ\_LOCATIONS
- HZ\_CONTACT\_POINTS
- HZ\_PARTY\_SITES
- HZ\_ORG\_CONTACTS
- AS\_SALES\_LEADS
- AS\_SALES\_LEAD\_LINES
- AS\_SALES\_LEAD\_CONTACTS

The flexfields are imported along with other data in AS\_IMPORT\_INTERFACE during lead import process.

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

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

### 4.10.11 Understanding and Extending the Lead Import Program

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

#### What the Program Does

The program:

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

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

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

A user hook is available for extending the program to check for duplicate leads. See [Checking for Duplicate Leads](#) on page 4-125.

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

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

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

You can also use a user hook to extend the lead import program to route leads to the appropriate owner. See [Lead Routing Engine](#) on page 4-60)

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### **Program Flow**

Lead import follows the steps outlined below:

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

#### **4.10.12 User Hook for Customizing Duplicate Lead Checking**

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

##### **Checking for Duplicate Leads**

Hook name: IS\_DUPLICATE\_LEAD

Package Name: AS\_IMPORT\_SL\_CUHK

**Purpose**

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

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

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

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

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

**Calling package**

AS\_IMPORT\_SL\_PVT.Is\_Duplicate\_Lead

**API name**

Is\_Duplicate\_Lead\_Pre

**In parameters**

The four parameters below are standard input:

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

The following parameter does not have a standard input:

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

### Out Parameters

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

The following three parameters are standard output parameters.

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

### 4.10.13 How Lead Import Checks for Duplicates

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

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

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

The program assumes that customer\_key, and address\_key in HZ tables have already been generated. (See [Section 4.10.5, "Setting Up Lead Import"](#) on page 4-92.)

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

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

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#### 4.10.14 Lead De-duplication Enhancement

If a duplicate lead is identified against existing leads during transfer, that lead is prevented from entry into the Sales Leads table, and is marked as "Duplicate" in the Imports table.

##### Steps

A lead is considered a duplicate lead based on the values for the following fields:

- Customer Name
- Country
- Address 1
- Contact Last Name
- Contact First Name
- Contact Email
- Contact Phone (if Email null)
- Source Code
- Vehicle Response
- Creation Date (in the last 7 days)
- First Lead Note (on the same creation date as the lead only).

### Algorithm

- The de-duplication procedure looks first for a duplicate contact (last name, first name) AND email address. If this value is a duplicate, the procedure continues checking. Else this is a unique lead.
  - If email is null, then the procedure looks at phone. If this value is a duplicate, the procedure continues checking. Else this is a unique lead.
  - If phone is null, this is a unique lead.
- The procedure looks next at customer (name, address, and country). If this value is a duplicate, the procedure continues checking. Else this is a unique lead.
- The procedure looks next at creation date. If the matching lead(s) is created within 7 days of the creation date of the compared lead, the procedure continues checking. Else this is a unique lead.
- The procedure looks next at all other fields (source code, vehicle response, first lead note). If all values match, the lead is a duplicate. Else this is a unique lead.

### CUSTOMER\_KEY

The lead import program generates the customer key as follows:

1. If the ORIG\_SYSTEM\_REFERENCE column is populated in the AS\_IMPORT\_INTERFACE table, then the lead import program uses only this value to generate the customer key. It does not perform any of the steps listed below.
2. If the ORIG\_SYSTEM\_REFERENCE column is null, then the lead import program:
  - a. Gets m words from party\_name (m defined in profile: HZ\_KEY\_WORD\_COUNT).
  - b. Replaces the words defined in the word replacement form.
  - c. Removes noise words.

### ADDRESS\_KEY

The lead import program generates the address key as follows:

1. Replaces address1 with words defined in word replacement form
2. Gets m characters from the replaced address1 (m defined in profile: HZ\_ADDRESS\_KEY\_LENGTH) => key1

3. Replaces postal\_code with words defined in word replacement form
4. Gets n characters from the replaced address1 (n defined in profile: HZ\_POSTAL\_CODE\_KEY\_LENGTH) =>key2)
5. If key2 is not null, then address\_key = key1 + '.' + key2; else address\_key = key1

### **CONTACT\_KEY**

The lead import program generates the contact key as follows:

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

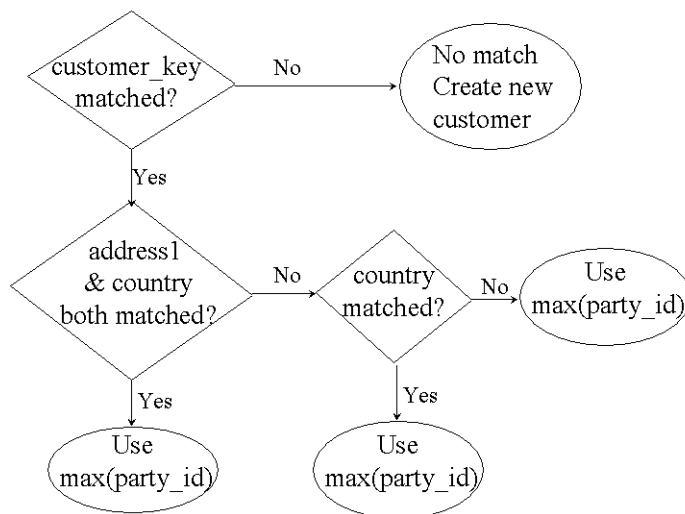
### **Duplicate Checking for Customer Records**

Existence checking is done using customer\_key in HZ\_PARTIES. This key is generated by TCA APIs while creating the customer.

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

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

The following diagram shows the process flow.



If the ORIG\_SYSTEM\_REFERENCE column in AS\_IMPORT\_INTERFACE is populated, then the lead import program uses this as the customer key. Be careful in populating this column.

What follows is an example of how wrong values generate the wrong customer key. In HZ\_PARTIES:

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

In AS\_IMPORT-INTERFACE:

PARTY_ID	PARTY_NAME	ORIG_SYSTEM_REFERENCE
10001	QQQ Corp.	OTN::1501

The CUSTOMER\_KEY for this record is ABC (incorrect) instead of QQQ (correct).

### **Duplicate Checking for Addresses**

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

The existence checking is done using address\_key in HZ\_LOCATIONS. This key is generated by the TCA APIs while creating the location. The Lead Import program populates the AS\_IMPORT\_INTERFACE table with address keys using TCA APIs for all leads to be imported. It then compares the address key of the lead to be imported with address keys in HZ\_LOCATIONS.

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

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

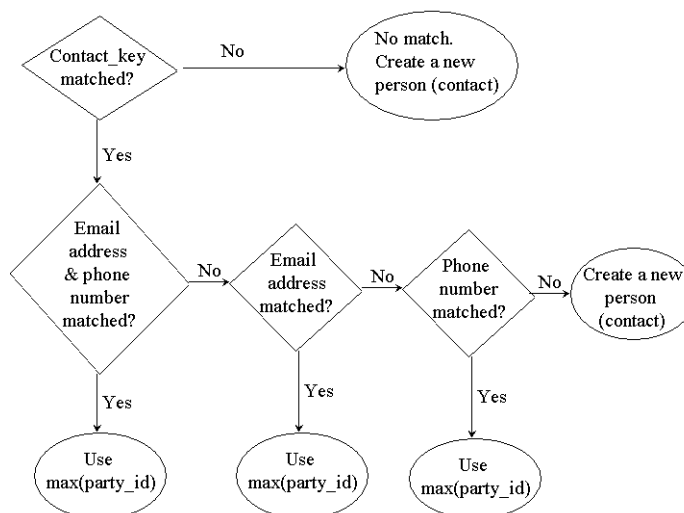
### **Duplicate Checking for Contacts**

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

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

If a contact with same first name and last name (the same party\_name) exists in HZ\_PARTIES, then the lead import program does not create a new contact in the

TCA tables. It instead creates a new relationship and attaches the lead to that contact.



### Contact Restrictions

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

No existence checking is done.

### Contact Points

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

### Limitations

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

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

### AS\_IMP\_CTL\_ROL\_INTERFACE

The following table lists the columns in the table AS\_IMP\_CNT\_ROL\_INTERFACE. Any values you populate in this interface table is imported along with the values in the main interface table.

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMP_CNT_ROL_INTERFACE_ID	NOT NULL	NUMBER			
IMPORT_INTERFACE_ID	NOT NULL	NUMBER			
LAST_UPDATE_DATE	NOT NULL	DATE		Standard Who column	
LAST_UPDATED_BY	NOT NULL	NUMBER		Standard Who column	
CREATION_DATE	NOT NULL	DATE		Standard Who column	
CREATED_BY	NOT NULL	NUMBER		Standard Who column	
LAST_UPDATE_LOGIN	NOT NULL	NUMBER		Standard Who column	
REQUEST_ID		NUMBER			
PROGRAM_APPLICATION_ID		NUMBER		Application identifier of last concurrent program	
PROGRAM_ID		NUMBER		Identifier of last concurrent program to update re	
PROGRAM_UPDATE_DATE		DATE		Last date concurrent program updated record	
ORG_CONTACT_ID		NUMBER		DO NOT POPULATE	

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
ORG_CONTACT_ROLE_ID		NUMBER		DO NOT POPULATE	
ORIG_SYSTEM_REFERENCE		VARCHAR2(240)			HZ_ORG_CONTACT_ROLES.orig_system_reference
PRIMARY_CONTACT_PER_ROLE_TYPE		VARCHAR2(1)	'Y' or 'N'		'HZ_ORG_CONTACT_ROLES.primary_contact_per_role_type
PRIMARY_FLAG		VARCHAR2(1)	'Y' or 'N'		'HZ_ORG_CONTACT_ROLES.primary_flag
ROLE_LEVEL		VARCHAR2(30)			HZ_ORG_CONTACT_ROLES.role_level
ROLE_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = 'CONTACT_ROLE_TYPE		'HZ_ORG_CONTACT_ROLES.role_type

### AS\_IMP\_CNT\_PNT\_INTERFACE

The following table lists the columns in the table AS\_IMP\_CNT\_PNT\_INTERFACE. Any values you populate in this interface table is imported along with the values in the main interface table.

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMP_CNT_PNT_INTERFACE_ID	NOT NULL	NUMBER			

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMPORT_INTERFAC E_ID	NOT NULL	NUMBER			
OWNER_TYPE	NOT NULL	VARCHAR2(3 0)		'CONTACT' or 'PERSON'	
PARTY_ID		NUMBER		Person's party ID	
LAST_UPDATE_DAT E	NOT NULL	DATE		Standard Who column	
LAST_UPDATED_BY	NOT NULL	NUMBER		Standard Who column	
CREATION_DATE	NOT NULL	DATE		Standard Who column	
CREATED_BY	NOT NULL	NUMBER		Standard Who column	
LAST_UPDATE_LOG IN	NOT NULL	NUMBER		Standard Who column	
REQUEST_ID		NUMBER			
PROGRAM_APPLIC ATION_ID		NUMBER		Application identifier of last concurrent program	
PROGRAM_ID		NUMBER		Identifier of last concurrent program to update re	
PROGRAM_UPDATE _DATE		DATE		Last date concurrent program updated record	
ORIG_SYSTEM_REFE RENCE		VARCHAR2(2 40)			HZ_CONTACT_P OINTS.orig_syste m_reference

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
CONTACT_POINT_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type ='COMMUN ICATION_TY PE		HZ_CONTACT_P OINTS.CONTACT _POINT_TYPE
EMAIL_FORMAT		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type ='EMAIL_FO RMAT		HZ_CONTACT_P OINTS.EMAIL_FO RMAT
EMAIL_ADDRESS		VARCHAR2(2000)			HZ_CONTACT_P OINTS.EMAIL_A DDRESS
WEB_TYPE		VARCHAR2(60)			HZ_CONTACT_P OINTS.WEB_TYPE
URL		VARCHAR2(2000)			HZ_CONTACT_P OINTS.URL
PHONE_LINE_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = 'PHONE_LI NE_TYPE		HZ_CONTACT_P OINTS.PHONE_LI NE_TYPE
PHONE_COUNTRY_CODE		VARCHAR2(30)			HZ_CONTACT_P OINTS.PHONE_C OUNTRY_CODE
PHONE_AREA_CODE		VARCHAR2(40)			HZ_CONTACT_P OINTS.PHONE_A REA_CODE

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PHONE_NUMBER		VARCHAR2(240)			HZ_CONTACT_POINTS.PHONE_NUMBER
PHONE_EXTENSION		VARCHAR2(20)			HZ_CONTACT_POINTS.PHONE_EXTENSION
RAW_PHONE_NUMBER		VARCHAR2(60)			HZ_CONTACT_POINTS.RAW_PHONE_NUMBER
OWNER_TABLE_NAME		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = 'OWNER_TABLE_NAME'	If not given, use 'HZ_PARTIES'	'HZ_CONTACT_POINTS.OWNER_TABLE_NAME
OWNER_TABLE_ID		NUMBER		If not given, use relationship's party id for party_type='ORGANIZATION'; or party id for others	HZ_CONTACT_POINTS.OWNER_TABLE_ID
PRIMARY_FLAG		VARCHAR2(1)			HZ_CONTACT_POINTS.PRIMARY_FLAG
CONTENT_SOURCE_TYPE		VARCHAR2(30)	select lookup_code from ar_lookups where lookup_type = 'CONTENT_SOURCE_TYPE'		'HZ_CONTACT_POINTS.CONTENT_SOURCE_TYPE

Column	Can be NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PHONE_CALLING_CALENDAR		VARCHAR2(30)			HZ_CONTACT_POINTS.PHONE_CALLING_CALENDAR
TELEX_NUMBER		VARCHAR2(50)			HZ_CONTACT_POINTS.TELEX_NUMBER
TIME_ZONE		NUMBER			HZ_CONTACT_POINTS.TIME_ZONE
CONTACT_POINT_PURPOSE		VARCHAR2(30)	if contact_point_type <> 'WEB': select lookup_code from ar_lookups where lookup_type = 'CONTACT_POINT_PURPOSE'		HZ_CONTACT_POINTS.WH_UPDATE_DATE
PRIMARY_BY_PURPOSE		VARCHAR2(30)		'Y' or 'N'	'
TRANSPOSED_PHONE_NUMBER		VARCHAR2(60)			

### AS\_IMP\_LINES\_INTERFACE

The following table lists the columns in the table AS\_IMP\_LINES\_INTERFACE. Any values you populate in this interface table is imported along with the values in the main interface table.

Column	Can Leave NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
IMP_LINES_INTERFAC E_ID	NOT NULL	NUMBER			
IMPORT_INTERFACE_I D	NOT NULL	NUMBER			
LAST_UPDATE_DATE	NOT NULL	DATE		Standard Who column	
LAST_UPDATED_BY	NOT NULL	NUMBER		Standard Who column	
CREATION_DATE	NOT NULL	DATE		Standard Who column	
CREATED_BY	NOT NULL	NUMBER		Standard Who column	
LAST_UPDATE_LOGIN	NOT NULL	NUMBER		Standard Who column	
REQUEST_ID		NUMBER			
PROGRAM_APPLICATION_ID		NUMBER		Application identifier of last concurrent program	
PROGRAM_ID		NUMBER		Identifier of last concurrent program to update re	
PROGRAM_UPDATE_DATE		DATE		Last date concurrent program updated record	
INTEREST_TYPE_ID	NOT NULL		select interest_type_id FROM as_interest_type s_b WHERE ENABLED_FLAG = 'Y' and EXPECTED_PURCHASE_FLAG = 'Y'		'AS_SALES_LEAD_LINES.INTEREST_TYPE_ID

Column	Can Leave NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
PRIMARY_INTEREST_CODE_ID			select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = and Pic.Parent_Interest_Code_Id Is Null and ENABLED_FLAG = 'Y		'AS_SALES_LEAD_LINES.PRIMARY_INTEREST_CODE_ID
SECONDARY_INTEREST_CODE_ID			select Interest_Code_Id FROM As_Interest_Codes_B WHERE Interest_Type_Id = And Parent_Interest_Code_Id = and ENABLED_FLAG = 'Y		'AS_SALES_LEAD_LINES.SECONDARY_INTEREST_CODE_ID
INVENTORY_ITEM_ID			select inventory_item_id, organization_id FROM mtl_system_items		AS_SALES_LEAD_LINES.INVENTORY_ITEM_ID
ORGANIZATION_ID					AS_SALES_LEAD_LINES.ORGANIZATION_ID
UOM_CODE			select uom_code from mtl_units_of_measure		AS_SALES_LEAD_LINES.UOM_CODE
QUANTITY					AS_SALES_LEAD_LINES.QUANTITY

Column	Can Leave NULL?	Data Type	Select for LOV or List of Valid Values	Comments	Target Table.column
BUDGET_AMOUNT					AS_SALES_LEAD_LINES.BUDGET_AMOUNT
SOURCE_PROMOTION_ID			select source_code_id from ams_source_codes where active_flag = 'Y'		'AS_SALES_LEAD_LINES.SOURCE_PROMOTION_ID
OFFER_ID			select source_code_id from ams_source_codes where active_flag = 'Y' and ARC_SOURCE_CODE_FOR = 'OFFR'		'AS_SALES_LEAD_LINES.OFFER_ID

#### 4.10.15 Lead Import Errors Table Structure

The following table lists the columns in the AS\_LEAD\_IMPORT\_ERRORS table which stores error messages recorded during lead import:

Column	Can leave NULL?	Data Type	Comments
LEAD_IMPORT_ERROR_ID	Not Null	NUMBER	
LAST_UPDATED_BY	Not Null	NUMBER	Standard who column
LAST_UPDATE_DATE	Not Null	DATE	Standard who column
CREATION_DATE	Not Null	DATE	Standard who column
CREATED_BY	Not Null	NUMBER	Standard who column
LAST_UPDATE_LOGIN	Not Null	NUMBER	Standard who column
IMPORT_INTERFACE_ID	Not Null	NUMBER	

Column	Can leave NULL?	Data Type	Comments
BATCH_ID	Not Null	NUMBER	
ERROR_TEXT		VARCHAR2(2000)	Stores error messages from lead import
SECURITY_GROUP_ID		NUMBER	
REQUEST_ID		NUMBER	
PROGRAM_APPLICATION_ID		NUMBER	
PROGRAM_ID		NUMBER	
PROGRAM_UPDATE_DATE		DATE	

#### 4.10.16 Sequence Generators

The following functions generate sequences for lead import tables.

- AS\_SL\_IMP\_BATCH\_S: Populates the batch id.

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

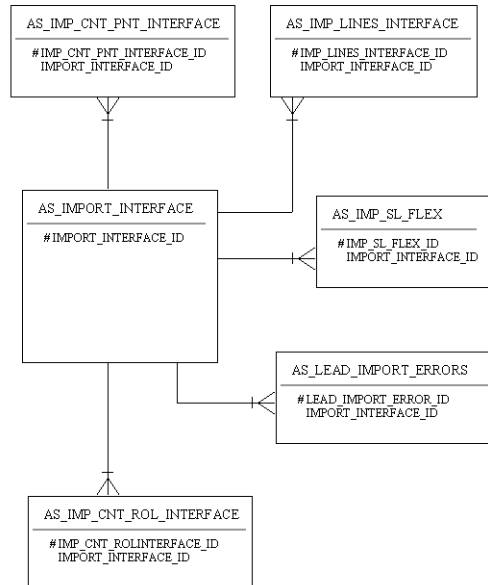
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- AS\_LEAD\_IMPORT\_ERRORS\_S: Populates the PK for AS\_LEAD\_IMPORT\_ERRORS table.
- AS\_IMP\_SL\_FLEX\_S: Populates the PK for AS\_IMP\_SL\_FLEX table.
- AS\_IMPORT\_INTERFACE\_S: Can be used to populate the PK for AS\_IMPORT\_INTERFACE\_S.
- AS\_IMP\_CNT\_ROL\_INTERFACE\_S: Can be used to populate the PK for AS\_IMP\_CNT\_ROL\_INTERFACE.
- AS\_IMP\_CNT\_PNT\_INTERFACE\_S: Can be used to populate the PK for AS\_IMP\_CNT\_PNT\_INTERFACE.
- AS\_IMP\_LINES\_INTERFACE\_S: Can be used to populate the PK for AS\_IMP\_LINES\_INTERFACE.

## 4.10.17 Database Design



## 4.11 Setting Up Opportunities and Forecasting

**Applies to: Sales Online, TeleSales, Field Sales**

Setting up opportunities and forecasting consists of:

- [Section 4.11.1, "Setting Up Opportunity and Forecasting Profiles"](#) on page 4-145
- [Section 4.11.2, "Creating Win Probabilities"](#) on page 4-149
- [Section 4.11.3, "Defining or Modifying Sales Stages"](#) on page 4-150
- [Section 4.11.4, "Setting Up Sales Methodology"](#) on page 4-151
- [Section 4.11.5, "Setting Up the Calendar"](#) on page 4-153
- [Section 4.11.6, "Defining Credit Types in Order Management"](#) on page 4-154
- [Section 4.11.7, "Setting Up Opportunity Status"](#) on page 4-154

- [Section 4.11.8, "Setting Up Interest Types"](#) on page 4-156
- [Section 4.11.9, "Setting Up Interest Codes"](#) on page 4-157
- [Section 4.11.10, "Setting Up Plan Element Mapping"](#) on page 4-158
- [Section 4.11.11, "Loading Inventory Categories"](#) on page 4-160
- [Section 4.11.12, "Setting Up Forecast Categories"](#) on page 4-161
- [Section 4.11.13, "Setting Up Forecast Category Mapping"](#) on page 4-161
- [Section 4.11.14, "Setting Up Budget/Revenue"](#) on page 4-162

### 4.11.1 Setting Up Opportunity and Forecasting Profiles

Opportunity and forecasting classifications are governed by the following profiles:

#### Forms Navigation

Profiles > System

#### Forms Responsibility

Oracle Sales Administrator

#### HTML Navigation

Profile > Forecast or Opportunity

#### Responsibility

Oracle Sales Online Super User

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

The following table outlines the profiles that you can set to meet your business requirements.

Profile Name	Description	Default
OS: Address Required for Opportunity	Customer address required for opportunity.	
OS: Address Required for Organization	Customer address required for opportunity.	
OS: Address Required for Person	Customer address required for opportunity.	

<b>Profile Name</b>	<b>Description</b>	<b>Default</b>
OS: Address Required for Sales Lead	Customer address required for opportunity.	
OS: Allow Updating Frozen Opportunities	When set to yes, users can update frozen opportunities.	
OS: Compensation Sales Credit Type	Compensation Sales Credit Type (mandatory)	
OS: Competitor Required for Opportunity	Key competitor field allows you to enter a single competitor at the opportunity level as the key competitor. The list of values for the field are derived from the Competitor Products entered using Oracle Marketing Online. If set to Yes, this is a required field when creating an opportunity.	
OS: Daily Conversion Type	Currency conversion type used for daily conversion rates.	
OS: Date Mapping Type of a Period for Pseudo Period Rates	Indicates whether the first or last date of the period is used for calculating pseudo period rates.	
OS: Default Close Date Days	Default Opportunity Close Date days (Value + Current Date = Opportunity Close Date)	
OS: Default Opportunity Sales Stage (Required)	Default Sales Stage	
OS: Default Opportunity Status	Default Opportunity Status	
OS: Default Opportunity Win Probability (Required)	Default Opportunity Win Probability	
OS: Default Period Type for Currency Conversion (Required)		
OS: Default Sales Channel	Default Sales Channel	
OS: Defaulting Primary Customer Address to Opportunity	Defaulting primary customer address to opportunity.	No
OS: Display Purchase Line Sub Total	If set to Yes, will display subtotal by interest type.	No
OS: Enable Tracking Opportunity History Data		
OS: Forecast Sales Credit Type	Sets the default forecast sales credit type	
OS: Generate Opportunity System Notes	Determines whether or not notes are generated when parts of the opportunity change.	
OS: Inventory Category Integration	Flag to populate Inventory categories in Oracle Sales	

Profile Name	Description	Default
OS: Linking Opportunity to Lead	<p>There are three settings for this profile:</p> <p>Allow with prompt-If selected, allows the user to create a link to a lead either through the "Create Opportunity" function or through the Leads link on the Opportunity detail page.</p> <p>Allowed-If selected, allows the user to create a link to a lead through the Leads link on the Opportunity detail page.</p> <p>Not allowed-If selected, does not allow users to create links to leads.</p>	Allow with prompt
OS: Maximum Roll Days for Converting Amount	Maximum Roll Days for Converting Amount if no conversion rate for a day.	
OS: Opportunity Probability Link	Determines whether a warning or an error is given if the win probability amount does not fall within the sales stage probabilities. The warning is turned on by default.	
OS: Opportunity Sales Credit Enforced Sales Team Definition	Opportunity Sales Credit Enforced Sales Team Definition	
OS: Privilege to Change Opp Owner	Privilege to change the opportunity owner.	No
OS: Sales Methodology	Sales methodology	
OS: Sales Team Creator Keep Flag	Default keep flag for sales team creator.	
OSO: Display Bubble Train		
OSO: Display Opportunity Competitors in Detail		
OSO: Display Purchase Line Subtotal	Display purchase line sub total in opportunity detail page.	No
OSO: Enable Lead Share (obsolete)	Display Lead Share button	
OSO: Enable Quote		
OSO: Oracle Internal		
OSO: Use Product Category LOV	Display Product Category column as LOV in opportunity purchase item table. If the profile value is "No" this column will be displayed as a drop down list.	No

## Forecasting Profiles

Profile Name	Description	Default
OS: Forecast Calendar (Required)	The name of the calendar being used to manage forecasts.	
OS: Forecast Category		
OS: Use Forecast Materialized View	If set to yes, materialized views will be used for forecasting.	
OS: Allow Opportunity Forecast by Product Category	If set to Yes, opportunities will display on the worksheet with the product categories that make up the opportunity by default. If set to No, the opportunity worksheet will not show the product category levels of the opportunity.	
OSO: Default Forecast Currency	Set the default currency used for forecasting.	
OSO: Default Forecast Period Type	Set the default period used for forecasting.	
OSO: Default Forecast Worksheet Lines	Choose to default worksheet lines to zero or pipeline.	
OSO: Display Opportunity Worksheet Grand Totals	Choose to display worksheet grand totals.	
OSO: Display Subordinate Current Pipeline	Choose to display subordinate current pipeline.	
OSO: Forecast Calendar Month	Choose the forecast calendar month.	
OSO: Forecast Max Generate Months	Set the maximum number of months generated when generating multiple forecasts.	
OSO: Opportunity Worksheet Threshold Amount	Determines the threshold amount under which opportunities will be rolled up into a single line item.	1,000
OSO: Store Opportunities After Aggregation Due to Forecast Threshold	If set to Y, then the opportunity amount on the threshold line is a hyperlink. Click the link to view all the opportunities within the threshold.	
OSO: Use Product Category LOV	Determines if a list of values or drop down menu will be used to select a product category on the opportunity detail page. If set to Yes, application will use a list of values. If set to No, application will use a drop down list. Using a list of values may have a positive impact on the speed of the application.	

## 4.11.2 Creating Win Probabilities

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

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

Use the following procedure to define or modify Win Probabilities.

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > Sales > Opportunity > Win Probability

### Responsibility

Oracle Sales Online Super User

### Steps

The Win Probabilities page opens.

1. To find a win probability:
  - a. Enter the win probability number in the Win Probability field.
  - b. Optionally, enter the Meaning.
  - c. Click **Search**.
2. To create a new probability:
  - a. Click in a **Win Probability** field in a new row. This is a required field.
  - b. Enter a Value between 0 and 100.
  - c. Enter or change the information in the **Meaning** field.
    - a. Select a Start Date in the **From** field by clicking the Calendar icon. This is a required field.

3. Optionally, enter an End Date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
4. Click the Enabled checkbox to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user's interface.
5. Click **Update** to save your work.

### 4.11.3 Defining or Modifying Sales Stages

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

Use the following procedure to define or modify Sales Stages.

#### **Forms Navigation**

Administration > takes you to HTML

#### **Forms Responsibility**

Oracle Sales Administrator

#### **HTML Navigation**

Administration > Sales > Opportunity > Sales Stage

#### **Responsibility**

Oracle Sales Online Super User

#### **Steps**

The Sales Stages Window appears.

1. To find an existing Sales Stage:
  - a. Enter the sales stage name in the Name field.
  - b. Optionally, enter a Description.
  - c. Click **Search**.
2. To enter a new Sales Stage:
  - a. Click in a **Name** field in a new row. This is a required field.

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

#### 4.11.4 Setting Up Sales Methodology

Every time a sales representative has a potential opportunity, the sales representative follows a series of steps before closing the sale. This process is referred to as a Sales Methodology and the specific steps are referred to as Sales Stages. Each sales stage creates a set of tasks, mandatory or optional, to be performed by the sales representative in accordance with the Sales Methodology selected. However, a sales rep is not required to select a sales methodology if they choose not to and once a sales methodology is selected for an opportunity it cannot be changed.

The following list is the default Units of Measure (UOM) codes that, if used, the workflow calculates the planned end date. If not used, the planned end date and planned start date are the same as the system date:

- DAY (day)
- WK (week)
- HR (hour)
- MIN (minute)
- MTH (month)
- YR (year)
- CN (century)

If you use only these Unit of Measure codes, then you do not need to make any modifications. However, if you use any other Unit of Measure, then you must modify the CHECK\_DURATION procedure in the workflow package

AS\_SALES\_METH\_WF to make sure that the start and end dates are correctly calculated. You can find this workflow package with the file name AS/patch/115/sql/asxsmtws.pls (spec) and asxsmtwb.pls (body). Use the example in the file to make your change. If you do not make this modification, then the application does not calculate start and end dates. Instead, it creates a note informing the user of the problem.

Profiles that govern behavior when using Sales Methodologies are; OS: Create Tasks Flag which can be used to disable automatic creation of tasks throughout the sales methodology work flow and OS: Sales Methodology that can be used to set the default sales methodology at the site, application, or user level.

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > Sales > Opportunity > Sales Methodology

### **Responsibility**

Oracle Sales Online Super User

### **Steps**

The Sales Methodology Summary page opens.

1. Click **Create**.  
The Sales Methodology Create page opens.
2. Enter a name for the sales methodology. This is a required field.
3. Enter a description. This is an optional field.
4. Select Effective From date by clicking the Calendar icon and choosing a date. This is a required field.
5. Select Effective To date by clicking the Calendar icon and choosing dates.
6. Select the "Create Tasks for All Sales Stages" check box to create all the tasks for all sales stages when the sales methodology is selected for an opportunity. If the

flag is not selected, tasks are created for only those sales stages selected by the opportunity.

7. Enter the Sequence that with which you want the sales stage to follow. This is a required field.
8. Select a Sales Stage from the drop down list. This is a required field.
9. Optionally, select a Task Template Group from the drop down list.
10. Select a Minimum Win Probability from the drop down list. This is a required field.
11. Select a Maximum Win Probability from the drop down list. This is a required field.
12. Click **Create**.

Please note, if the sales methodology is being used by an opportunity, you can add new sales stages to the methodology but cannot modify the existing sales stages.

#### 4.11.5 Setting Up the Calendar

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

##### **Forms Navigation**

Old Setup > Opportunities > Calendar

##### **Forms Responsibility**

Oracle Sales Administrator

##### **Steps**

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

Refer to the *Oracle General Ledger User Guide* for more information.

### 4.11.6 Defining Credit Types in Order Management

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

#### Forms Navigation

Order Management > Sales Credit Type

#### Forms Responsibility

Oracle Sales Administrator

#### Steps

The Sales Credit Type window appears.

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

### 4.11.7 Setting Up Opportunity Status

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

Use the following procedure to define Opportunity Status.

#### Forms Navigation

Administration > takes you to HTML

## Forms Responsibility

Oracle Sales Administrator

## HTML Navigation

Administration > Sales > Opportunity > Status Codes

## Responsibility

Oracle Sales Online Super User

## Steps

1. To search for a Status Code:
  - a. Enter the Status Code.
  - b. Enter the Meaning
  - c. Enter the Description.
2. To create a new Status Code:
  - a. Click the **Create** button.
  - b. Enter a Status Code.
  - c. Enter a Meaning.
  - d. Enter a Description.
  - e. Select the "Enabled" checkbox to activate the opportunity status.
  - f. Select the "Open" checkbox to signify whether the opportunity is open or closed. If the checkbox is selected, it means that the opportunity is open. Conversely, if the checkbox is not selected, it means that the opportunity is closed and the transaction requires a close reason to be entered.
  - g. Select the "Include in Forecast" checkbox to include the status in forecasts.
  - h. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox.
  - i. The Win Loss Indicator region indicates whether the deal has been won, lost, or neither. If the open flag is unchecked, then the choices are won, lost, or neither.
  - j. Click **Create**.
3. Click **Update** to save your work.

### 4.11.8 Setting Up Interest Types

Interest Types can be used to classify your customers (organizations and people), opportunities, and purchases in a number of ways. An interest type can represent any classification of products.

The Interest Type classification has three layers:

- Interest Type
  - Primary Interest Code
  - Secondary Interest Code

Use the following procedure to define Interest Types.

#### Forms Navigation

Administration > takes you to HTML

#### Forms Responsibility

Oracle Sales Administrator

#### HTML Navigation

Administration > Sales > Sales Category > Interest Types

#### Responsibility

Oracle Sales Online Super User

#### Steps

The Interest Types page opens.

1. To search for an Interest Type:
  - a. Select a **Type** from the drop down list.
  - b. Enter a **Description**.
  - c. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled). Only interest types with both the Expected Purchase and Globally Enabled check boxes selected will be able to load to inventory category.
  - d. Click **Search**.

2. To create a new Interest Type:
  - a. Select the first blank Type field and enter the name of the new interest type. This is a required field.
  - b. Optionally, enter a description.
  - c. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled).

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

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

You can create an interest type without enabling it at either the global or organization level, however, this interest type will not be available for use. The intent is to be able to create interest types that can be enabled at a later time.

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

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

### 4.11.9 Setting Up Interest Codes

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

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

Use the following procedure to modify and create Interest Codes.

#### Forms Navigation

Administration > takes you to HTML

## Forms Responsibility

Oracle Sales Administrator

## HTML Navigation

Administration > Sales > Sales Category > Interest Code

## Responsibility

Oracle Sales Online Super User

## Steps

The Interest Codes page opens.

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

### 4.11.10 Setting Up Plan Element Mapping

In order for sales personnel to be able to estimate their commissions based on their submitted product category worksheet forecasts, interest types and codes must be mapped to Plan Elements in Oracle Sales Compensation.

One Plan Element can be mapped to one or more interest type/primary interest code/secondary interest code.

Plan element mapping is required for using Income Planner.

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > Sales > Sales Category > Plan Element Mapping

### Responsibility

Oracle Sales Online Super User

### Steps

1. To search for a plan element mapping:
  - a. Enter the plan element.
  - b. Select the mapping type from the drop down list.
  - c. Click **Search**.
2. To create a new plan element mapping:
  - a. Select the first blank Plan Element field and select the plan element you want to map from the drop down list. This is a required field.
  - b. From the second column, select the Mapping Type from the drop down list. This is a required field.
    - \* Map quota to primary interest code - if you want to map the plan element to a primary code.
    - \* Map quota to secondary interest code - if you want to map the plan element to a secondary code.
    - \* Map quota to interests type - if you want to map the plan element to an interest type.
  - c. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.

- d. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using % as a wildcard, and click Go.
3. Click **Update** to save your work.

### 4.11.11 Loading Inventory Categories

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

Use this procedure to set up and load Inventory Categories.

---

---

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

---

---

#### Prerequisites

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

#### Steps

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

This must be done manually by using Oracle Inventory screens, for details please refer to *Oracle Inventory User's Guide*.

---

---

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

---

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## 4.11.12 Setting Up Forecast Categories

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

You can add or modify forecast category from the Administration tab.

- [Section 4.11.12.1, "Modify an Existing Forecast Category"](#)
- [Section 4.11.12.2, "Add a Forecast Category"](#)

### 4.11.12.1 Modify an Existing Forecast Category

#### Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

#### Steps

1. Modify information.
2. Click **Update**.

### 4.11.12.2 Add a Forecast Category

#### Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

#### Steps

1. In the first blank line on the Forecast Category summary table, enter a new Forecast Category Name. This is a required field.
2. Click the Calendar icon and select a Start Date. This is a required field.
3. Click the Calendar icon and select an End Date.
4. Click **Update**.

## 4.11.13 Setting Up Forecast Category Mapping

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

Use the following procedure to set up Forecast Categories.

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > Sales > Forecast > Forecast Sales Category Mapping

### **Responsibility**

Oracle Sales Online Super User

### **Steps**

The Forecast Sales Categories page opens.

1. To search for a Forecast Sales Category:
  - a. Select a Forecast Category Name from the drop down list.
  - b. Click **Search**.
2. To create a new Sales Category Value:
  - a. In the first blank Interest Type field, select an interest type from the drop down list. This is a required field.
  - b. Select a Start Date by clicking the Calendar icon. This is a required field.
  - c. Select an End Date by clicking the Calendar icon. This is a required field.
3. Click **Update** to save your work.

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

## **4.11.14 Setting Up Budget/Revenue**

The Budget/Revenue set up is used to govern the Forecast reports, to compare forecast and pipeline amounts to the allocated budget and actual revenue amounts. You can enter data or load data from a file.

### **Prerequisites**

None

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > Sales > Forecast > Budget/Revenue Entry

### **Responsibility**

Oracle Sales Online Super User

## **4.11.15 Searching for an Existing Budget and Revenue Entry**

To search for an existing budget and revenue entry, follow these steps:

### **Steps**

1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.

## **4.11.16 Entering New Budget and Revenue Amounts**

To enter new budget and revenue amounts, follow these steps:

### **Navigation**

Administration > Sales > Forecast > Budget/Revenue Entry

### **Steps**

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

2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.
6. Enter the budget amount.
7. Enter actual revenue amount.
8. Select a currency from the drop down list. This is a required field if amount is entered.
9. Click **Update** to save your work.
10. Click the **Sales Group Name** link to view details and enter data for the next level of subordinates.

## 4.11.17 Upload Data From a File

### Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

### Steps

1. Click the "**Click here to Upload a file to a database**" link.
2. Enter the file name with a directory path and file extension OR click **Browse** to retrieve the file name from a local drive.

**Note:** This file should be a comma separated text file with each column enclosed in double quotes. Each line in the file should correspond to one row of data.

Example file format: "period name", "sales group number", "salesperson number", "budget", "revenue", "currency"

Example for sales group: "Q1-01", "40", "(The salesperson number is blank)", "680000", "200000000", "USD"

Example for a salesperson: "Sep-01", "50", "12018", "120,000.20", "1,854,200.30", "HKD"

3. Click **Upload**.

At the completion of the upload process, a message with the log file name is displayed. The log file is generated on the server in a directory located by the Oracle parameter `utl_file_dir` in `init.ora` file.

## 4.12 Setting Up Multiple Currencies

### **Applies to: Sales Online, TeleSales**

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

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

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

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

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

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

Setting up multiple currencies requires:

- [Section 4.12.1, "Setting Up Currency Codes" on page 4-166](#)
- [Section 4.12.2, "Setting Up Calendar Types" on page 4-167](#)
- [Section 4.12.3, "Setting Up the Accounting Calendar" on page 4-168](#)

- [Section 4.12.4, "Setting Up the Default Currency and Selecting the Calendar" on page 4-169](#)
- [Section 4.12.5, "Setting Up Profile for Positive and Negative Number Format for Currency" on page 4-169](#)
- [Section 4.12.6, "Setting Up Type Mapping" on page 4-170](#)
- [Section 4.12.7, "Setting Profile Options for Multiple Currency" on page 4-171](#)
- [Section 4.12.8, "Setting Up Reporting Currency" on page 4-171](#)
- [Section 4.12.9, "Entering GL Daily Conversion Rates" on page 4-172](#)
- [Section 4.12.10, "Setting Up Transaction Calendar" on page 4-173](#)
- [Section 4.12.11, "Entering Currency Conversion Dates for Periods \(Pseudo Period Rates\)" on page 4-174](#)
- [Section 4.12.11.1, "Defining Conversion Rates for Periods" on page 4-175](#)
- [Section 4.12.12, "Run Concurrent Programs" on page 4-176](#)

## 4.12.1 Setting Up Currency Codes

### Forms Navigation

Application > Currency

### Forms Responsibility

Oracle Sales Administrator

### Steps

1. Enter Code.
2. Enter Name.
3. Enter Description.
4. Enter Issuing Territory.
5. Enter Symbol.
6. Enter Precision.
7. Enter Extended Precision.
8. Enter Minimum Accountable Unit.

9. Enter Currency Derivation.

10. Enter Effective dates

11. Select Enabled flag.

Make sure that the "Enabled" check box is selected if you want to use the currency in Oracle Sales Online.

## 4.12.2 Setting Up Calendar Types

Forecast calendar types are used in forecasting.

Follow these steps to modify or create calendar types.

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > General > Globalization > Calendar Type

### Responsibility

Oracle Sales Online Super User

### Steps

1. To search for calendar types:
  - a. Select a Year Type from the drop down list.
  - b. Enter a Period Type.
  - c. Click **Search**.
2. To create a new calendar type:
  - a. In the first blank Period Type field, enter the period type you want to create. This is a required field.
  - b. Enter the number of Periods Per Year (between 1 and 366 days). This is a required field.

- c. Select a Year Type from the drop down list. This is a required field.
  - d. Optionally, enter a Description.
3. Click **Update** to save your work.

### 4.12.3 Setting Up the Accounting Calendar

#### Forms Navigation

Administration > takes you to HTML

#### Forms Responsibility

Oracle Sales Administrator

#### HTML Navigation

Administration > General > Globalization > Accounting Calendar

#### Responsibility

Oracle Sales Online Super User

#### Steps

1. To search for an existing Accounting Calendar:
  - a. Select a Calendar from the drop down list. This is a required field.
  - b. Enter a Period Name.
  - c. Enter a Start Date.
  - d. Enter an End Date.
  - e. Click **Search**.
2. To create a new accounting calendar:
  - a. Either click the **Create** button or in the first blank Prefix field, enter a prefix for the accounting calendar you want to create. This is a required field.
  - b. Select a Type from the drop down list. This is a required field.
  - c. Enter a Year. This is a required field.
  - d. Enter a Quarter. This is a required field.
  - e. Enter a Number. This is a required field.

- f. Select a From and To Date by clicking the Calendar icon. These are required fields.
- g. Enter an calendar name.
- h. Click **Create** from the create accounting calendar page OR if you created the calendar on the summary page, click **Update**.

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**Note:** The number is validated against Periods Per Year for the period type defined in Calendar Type.

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#### 4.12.4 Setting Up the Default Currency and Selecting the Calendar

Set up the default currency for your implementation.

##### **Forms Navigation**

Profiles > System

##### **Forms Responsibility**

Oracle Sales Administrator

##### **Steps**

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

#### 4.12.5 Setting Up Profile for Positive and Negative Number Format for Currency

##### **Forms Navigation**

Profiles > System

### **Forms Responsibility**

Oracle Sales Administrator

### **Steps**

1. Login as System Administrator.
2. Select Profiles.
3. Select System.
4. Set Currency: Negative Format = <XXX>
5. Set Currency: Positive Format = XXX

## **4.12.6 Setting Up Type Mapping**

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > General > Globalization > Type Mapping

### **Responsibility**

Oracle Sales Online Super User

### **Steps**

1. Select the same calendar you selected in the profile option "OS: Forecast Calendar".
2. To create a new Type Mapping:
  - a. In the first blank Period Type field, select a period type from which you want to set the conversion rates from the drop down list. This is a required field. Make sure that the calendar you are using is the forecast calendar.
  - b. Select the Conversion Type from the drop down list. This is a required field.
  - c. Enter a description.

- d. Select the **Updatable** and **Deletable** checkboxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).

## 4.12.7 Setting Profile Options for Multiple Currency

### Forms Navigation

Profiles > System

### Forms Responsibility

Oracle Sales Administrator

Set the following profile options for multiple currencies:

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

## 4.12.8 Setting Up Reporting Currency

All opportunity and forecast currency conversions are based upon the reporting currency setups. Please note, all possible reporting currencies are listed in the Profiles > Preferences > User Currency because they are set up by Oracle CRM Foundation. In order to view these currencies when entering opportunities or forecasting opportunities, they must be set up here.

### Forms Navigation

Oracle Sales Setup > Lookup Codes > Sales

This path will take you to the Oracle Sales Lookup form.

### Forms Responsibility

Oracle Sales Administrator

### Steps

This path will take you to the Oracle Sales Lookup form.

1. Press the F11 key to enter query mode.
2. Enter "REPORTING\_CURRENCY" in the type field.

3. Press Control and F11 at the same time.  
The currency codes should display in the bottom region of the Form and allow you to create a new one, if needed.
4. Enter transaction currency in the **Transaction Currency** field.
5. Define reporting currency with the type, REPORTING\_CURRENCY.
6. Enter the date the mapping is active in the **Start Date** field.
7. Optionally, enter the date the mapping ends in the **End Date** field.
8. Save your work.

### 4.12.9 Entering GL Daily Conversion Rates

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

#### **Forms Navigation**

Administration > takes you to HTML

#### **Forms Responsibility**

Oracle Sales Administrator

#### **HTML Navigation**

Administration > General > Globalization > GL Daily Rate

#### **Responsibility**

Oracle Sales Online Super User

#### **Steps**

The GL Daily Rate page opens.

1. To search for a GL Daily Rate:
  - a. Select a From Currency from the drop down list.
  - b. Select a To Currency from the drop down list.
  - c. Select a Conversion Date by clicking the Calendar icon.

- d. Select a Conversion Type from the drop down list.
    - e. Click **Search**.
  2. Enter the daily conversion rates. For each daily conversion rate:
    - a. Select the first blank From Currency field and choose the currency you are converting from the drop down list. This is a required field.
    - b. In the To Currency field, select the currency you want to convert to from the drop down list. This is a required field.
    - c. Click the Calendar icon to select a Conversion Date. This is a required field.
    - d. Select a Conversion Type from the drop down list. This is a required field.
    - e. Enter the Conversion Rate in the field provided. This is a required field. The Inverse Conversion Rate is calculated and provided automatically.

If the profile "Daily Rates Window: Enforce Inverse Relationship During Entry" is set to Yes, the application ensures that the conversion rate and the inverse conversion rate always have an inverse relationship. If either rate is changed, the application automatically recalculates the other as the inverse of the changed rate. If the profile option is set to No, then the application will not enforce the inverse relationship. You can change either of the rates independently.
    - f. Click the Enter by Date Range button which allows you to enter conversions for a date range.
  3. Click **Update** to save your work.

## 4.12.10 Setting Up Transaction Calendar

Use the following steps to set up the transaction calendar.

### Navigation

Administration > General > Globalization > Transaction Calendar

#### 4.12.10.1 Find an Existing Transaction Calendar

Use the name or description of the calendar in the appropriate field. Click **Go**.

#### 4.12.10.2 Create a New Transaction Calendar

##### Steps

1. Enter the name for the new transaction calendar into the Name field .
2. Enter a description to identify the use of the calendar.
3. Select the days you want to include in the transaction calendar based on your business needs.
4. Click **Update**.

#### 4.12.10.3 View Transaction Calendar Details

##### Steps

1. [Find an Existing Transaction Calendar](#) OR click the name of the transaction calendar.
2. Update details such as, changing a specific date to be included in or excluded from the transaction calendar. You can identify the date by finding the specific date and selecting or de-selecting the check box associated with that date.
3. Click **Update**.

### 4.12.11 Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

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

##### Steps

1. Follow the steps for the procedure [Section 4.12.6, "Setting Up Type Mapping"](#) to enter the types of conversion rates you will use for each period type such as fiscal year, month, or quarter for the calendar you selected.
2. Set the system profile OS: Date Mapping Type for Periods by choosing whether you want to use the daily rate from the start or end date of a period for currency conversion.
3. Follow the steps for the procedure outlined in [Section 4.12.11.1, "Defining Conversion Rates for Periods"](#) below to search to see if the conversion rates have been entered for your periods. Enter any missing conversion rates.

### 4.12.11.1 Defining Conversion Rates for Periods

#### Forms Navigation

Administration > takes you to HTML

#### Forms Responsibility

Oracle Sales Administrator

#### HTML Navigation

Administration > General > Globalization > Period Rate

#### Responsibility

Oracle Sales Online Super User

#### Steps

The Pseudo Period Rates page opens.

1. To search for Pseudo Period Rates:
  - a. Select a Calendar from the drop down list.
  - b. Enter the full or partial name of the Period Name, using % as a wildcard, click **Go**.
  - c. Select a Start or End Date under the Mapping Date.
  - d. Click **Search**.
2. To create a new period rate:
  - a. On the first blank Period Name line, enter a full or partial period name, using % as a wildcard. Click **Go**. This is a required field.
  - b. Select the currency you want to convert From from the drop down list. This is a required field.
  - c. Select the currency you want to convert To from the drop down list. This is a required field.
  - d. Conversion Type is automatically populated from Period Name list of values in a previous step.
  - e. Enter the rate in the Rate field.

- f. The **Updatable** and **Deletable** checkboxes display if the pseudo period rates can be changed. If you need to change the status of these checkboxes, click the Type Mapping link.
3. Click **Update** to save your work.

## 4.12.12 Run Concurrent Programs

### Forms Navigation

Concurrent Requests > Run

### Forms Responsibility

Oracle Sales Administrator

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

- Refresh AS\_PERIOD\_DAYS table
- Refresh Multi-Currency Conversion Rates (AS\_PERIOD\_RATES)

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

- Refresh Sales Credit Denorm
- Refresh of Opportunity Bins Data
- Refresh of Forecast Summary Tables

## 4.12.13 Uploading Data from a File

To upload data from a file, follow these steps:

### Steps

1. Click **Upload** to load a data file to the database.
2. Enter the file name with a directory path and file extension OR click **Browse** to retrieve the file name from a local drive.

**Note:** This file should be a comma separated text file with each column enclosed in double quotes. Each line in the file should correspond to one row of data.

Example file format: "period name", "sales group number", "salesperson number", "budget", "revenue", "currency"

Example for sales group: "Q1-01", "40", "(The salesperson number is blank)", "680000", "200000000", "USD"

Example for a salesperson: "Sep-01", "50", "12018", "120,000.20", "1,854,200.30", "HKD"

3. Click **Submit** to start the upload process.
4. If you decide to cancel the upload, click **Cancel**.

At the completion of the upload process, a message with the log file name is displayed. The log file is saved on the server in a directory located by the Oracle parameter `utl_file_dir` in `init.ora` file. Click the link to view the process log file. Your browser settings determine which log file is displayed or you will see a prompt to save the file.

## 4.13 Setting Up Quoting

### **Applies to: Sales Online, TeleSales**

Sales applications rely on Oracle Quoting, formerly named Oracle Order Capture, for quote and order management. Oracle Sales Online uses the HTML-based interface for Oracle Quoting. Oracle TeleSales uses the Forms-based interface. However, both implementations use the *Oracle Quoting Implementation Guide*.

### **Oracle Sales Overview**

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

Your main work flows are:

**Opportunity to Quote:** You begin in Sales Online to work on an opportunity. On the opportunity details page, if the profile "OSO: Enable Quotes" is set to "Yes", then a Create Quote button appears on the page. Clicking this button will lead you to create a quote based on that particular opportunity.

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

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

**View quotes for an opportunity or party:** When you are working on opportunities, organizations, people, or relationship detail pages, there is a Quotes link on the side menu panel. Click the Quotes link to see all quotes that have been created for this opportunity or party.

## Steps

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

- Create new user
- Assign a Sales Representative role
- Import a CRM resource
- Set profile options
- Set QTO profile options

## Quote Profiles

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

- **OSO: Enable Quotes:** must be set to "Yes" to enable the Create Quote button on the opportunity detail page
- **IBE: Use Pricelist Associated with Specialty Store:** (optional) must be set to "Yes" if you want to view quotes in the storefront
- **MO: Operating Unit**
- **Enable OSO Integration:**

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

For TeleSales, set up the quoting flexfield *Header: Additional Information*. See the next section for information on setting up flexfields.

## 4.14 Setting Up Flexfields

### Applies to: Sales Online, TeleSales

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

Sales Online uses two types of descriptive flexfields. When flexfields are displayed for the single entity (e.g., an address on a page) they are context-sensitive. When they are displayed in HTML tables (e.g., opportunity contacts) only their global contexts are displayed. The following table lists the flexfields and the details about each flexfield. Please note, it is very important to freeze and compile the flexfields using the Forms application after installation is complete. The procedures for freezing and compiling flexfields is located in the *Oracle Applications Flexfield Guide*.

Flexfield Name	Title	Page Used In	Context Sensitive
Remit Address HZ	Address	Address Create/Detail (location information such as country, address1, state, city, etc.) Used for Global Address Formatting.	Yes
HZ_PARTIES	Party Information	Organization/Person, Create/Detail	Yes
HZ_PARTY_RELATIO NSHIPS	Party Relationship Information	Relationship Create/Detail	Yes
HZ_ORG_CONTACTS	Organization Contact Information	Relationship Create/Detail	Yes
HZ_PARTY_SITES	Party Site Information	Address Create/Detail ("Attributes" section)	Yes
AS_INTERESTS	Interests	Opportunity, Classifications	No
AS_ACCESSSES	Accesses	Opportunity/Organization/P erson Sales Team	No
AS_LEADS	Opportunities	Opportunity Create/Detail	Yes
AS_SALES_LEADS	Sales Leads		
AS_SALES_CREDITS	Sales Credits	Opportunity Sales Credits	No
AS_LEAD_COMPETI TORS	Opportunity Competitors	Opportunity Competitors	No

Flexfield Name	Title	Page Used In	Context Sensitive
AS_LEAD_CONTACT S	Opportunity Contacts	Opportunity Contacts	No
AS_LEAD_LINES	Opportunity Lines	Opportunity Purchase Items	No
AS_SALES_LEAD_LI NES	Sales Leads Lines	Leads	No
AS_SALES_LEAD_CO NTACTS	Sales Leads Contacts	Leads	No
AS_SALES_LEADS	Sales Leads	Leads	Yes

## 4.15 Setting Up the Home Page

### **Applies to: Sales Online, TeleSales**

The Home subtab is the default subtab where report, bins and charts are displayed. The Home subtab is a central place to provide users with information about all of the sales objects (leads, opportunities, forecasts, etc.). Users can configure their home page to show bins, reports, charts, and links to their favorite pages. Home page set-ups are needed in order for users to able to configure their pages. The home tab also has a sub tab for the Marketing Encyclopedia. The Marketing Encyclopedia needs to be set up in order for users to publish and subscribe.

The Tools subtab provides Internal Tools, such as resource and group lookups and External Tools, which are links to related applications outside of Sales Online. External Tools can be set-up at implementation time to include links to custom applications and web sites.

The Marketing subtab is a salesperson's portal to Marketing entities such as campaigns, events, collateral, products and pricing. This subtab will only work if you have also implemented Oracle Marketing Online.

The Encyclopedia subtab is the Marketing Encyclopedia System. It is a repository of sales and marketing information such as product collateral and sales kits. You must set-up the Marketing Encyclopedia module for this subtab to work.

The following steps are required for setting up your home page:

- [Running Concurrent Programs for Materialized Views](#)
- [Setting up Bin Accessibility](#)
- [Setting up Home Page Message](#)

- [Setting up External Tools](#)
- [Setting up News and Marketing Encyclopedia System](#)
- [Setting up Charts](#)

The available bins and charts:

- **New Leads:** This bin provides a count and amount of leads assigned to the user/period rolling up to a sales person.
- **Opportunity by Close Date:** This chart provides the ability to graph the open opportunities by close date.
- **Opportunity by Status:** This chart provides the ability to graph the opportunity status.
- **Opportunity by Win Probability:** This chart gives the ability to graph the open opportunities by win probability.
- **Leads:** This chart gives the sales person the ability to graph new leads.
- **Forecast History-Self:** This chart gives the ability to graph the submitted forecast numbers for a sales person.
- **Forecast History-Subordinates:** This chart gives the sales manager the ability to graph the submitted forecast number for his/her subordinate sales reps or groups.
- **Top Customers:** This chart gives the sales person the ability to graph the lifetime value of his/her top "n" customers. In order for the Top Customers chart to work, it is required that you run the Oracle Order Management concurrent program "Calculate Party Totals".
- **Open Opportunities:** This bin gives a count and amount of all the open opportunities per period rolling up to a sales person.
- **Won Opportunities:** This bin gives a count and amount of won opportunities per period rolling up to a sales person. This bin does not check the status of the opportunity. If an opportunity does not have a campaign name associated with it, the report will display 'No Description' and the number of opportunities without any particular campaign name.
- **My Forecast:** This bin provides a list of all forecast numbers that have been submitted per period by a sales person.

- **My Favorite Reports:** This bin provides the ability to bookmark application pages, saved reports, or saved searches that can later be run from the home page.
- **Win/Loss Ratio:** This bin provides a count of won opportunities, losses, and the ratio per period rolling up to a sales person. Loss analysis is an effective tool used by management to measure the sales effectiveness of the organization. The percentage data is based on the total opportunity amounts.

The following reports can be viewed on the home page:

- **Forecast Comparison Report**
- **Forecast History**
- **Forecast to Pipeline Summary Report**
- **Forecast Summary**
- **Forecast Progression**
- **Forecast Accuracy**

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > Sales > Home Page Bins

### **Responsibility**

Oracle Sales Online Super User

## **4.16 Running Concurrent Programs for Materialized Views**

### **Applies to: Sales Online**

A materialized view is an aggregation table, data is pre-populated into a table to improve performance.

Run the following concurrent programs:

Program Number	Mandatory	Concurrent Program Name	Description	Notes
1	Yes	Initial Build of Opportunity and Leads Bins	<p>This program is used for complete build of the base materialized views for Opportunity and New Leads bins, charts, and reports. This program loads the materialized views with sales credit and leads information.</p> <p>A new parameter: "Next Extent Size" has been added. You can choose the value of the next extent to be allocated for all tables and indexes created. Possible values for the parameter are: Small (1M), Medium (5M), Large (10M)</p>	<p>This program must be run:</p> <ul style="list-style-type: none"> <li>*Initially before users can set up Opportunity and Leads bins, charts, and reports.</li> <li>*Every time the as_sales_credit_denorm, JTF groups denorm or as_period_days is rebuilt or completely refreshed.</li> <li>*When values such as sales stages or statuses have been changed.</li> <li>*When snapshot logs and indices on base materialized views need to be re-created.</li> </ul>
2	No	Refresh of Lead Bins Data	This program refreshes the data in base materialized views for Leads. This program must be scheduled to run periodically.	<p>Users will not see leads in the bins, reports, or charts that were created after the last refresh of the base materialized view.</p> <p>Prerequisite: Program number 1</p>
3	No	Refresh of Opportunity Bins Data	This program refreshes the base materialized views for Opportunities. This program must be scheduled to run periodically.	<p>Users will not see opportunities in the bins, reports, or charts that were created after the last refresh of the base materialized view.</p> <p>Prerequisite: Program number 1</p>

<b>Program Number</b>	<b>Mandatory</b>	<b>Concurrent Program Name</b>	<b>Description</b>	<b>Notes</b>
4	Yes	Initial Load for Leads Reports	<p>This program loads the summary tables from the base materialized views.</p> <p>This program must be run initially before users can set up Leads bins and Reports and then periodically to refresh the summary tables.</p> <p>A new parameter: "Number of Processes" has been added. The number of desired parallel processes to load the summary tables should be specified here.</p>	<p>Users will not see leads in the bins and reports that were created after the last refresh of the summary tables.</p> <p>This program should be run every time the concurrent program number 1 is executed.</p> <p>Prerequisite:</p> <ul style="list-style-type: none"> <li>Program number 1, the first time for complete refresh.</li> <li>Program number 2, for incremental refresh.</li> </ul> <p>If this job fails, try the following:</p> <ul style="list-style-type: none"> <li>Run "Drop temp tables for Home Page MVs" to cleanup TEMP tables.</li> <li>Re-run Initial Load for Leads Reports.</li> </ul>

Program Number	Mandatory	Concurrent Program Name	Description	Notes
5	Yes	Initial Load for Opportunities Reports	<p>This program loads the summary tables from the base materialized views.</p> <p>This program must be run initially before users can set up opportunity bins and reports and then periodically to refresh the summary tables.</p> <p>A new parameter, "Number of Processes" has been added. The number of desired parallel processes to load the summary tables should be specified here.</p>	<p>Users will not see opportunities in the bins and reports that were created after the last refresh of the summary tables.</p> <p>This program should be run every time the concurrent program number 1 is executed.</p> <p>Prerequisite</p> <p>Concurrent program number 1, the first time for complete refresh.</p> <p>Concurrent program number 3 for incremental refresh.</p> <p>If this job fails, try the following:</p> <p>Run "Drop temp tables for Home Page MVs" to cleanup TEMP tables.</p> <p>Re-run Initial Load for Opportunities Reports.</p>

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

Alternatively, run these concurrent programs in order:

1. Initial Build of Opportunity and Leads Bin (program number 1)
2. Initial Load for Leads Reports (program number 4)
3. Initial Load for Opportunities Reports (program number 5)

For refresh programs to work efficiently, the alternate option is recommended.

### Steps

1. Log in to the Forms application.
2. Select the Oracle Sales Administrator responsibility.

3. Double-click **Concurrent Requests**.
4. Double-click **Run**.
5. Select the Single Request radio button.
6. Click **OK**.
7. Search for the concurrent request that you want to run.
8. Click **Submit**.
9. Select from the search results.
10. Click **OK**.
11. Click **OK** to run the concurrent request.

For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

## 4.16.1 Setting Up Home Page Bin Accessibility

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > Sales > Home Page Bins

### Responsibility

Oracle Sales Online Super User

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

### Steps

1. The Home Page Bins Administration page opens.

2. Select the Application from the drop down list. Please note, Sales Online is listed as Oracle Field Sales.
3. Select the Responsibility for which you want to give bin access from the drop down list.
4. Click **Search**.  
You will see a list of all the bins that this responsibility has access to.
5. Restrict access to the bin by selecting the Disable checkbox. Giving access to a bin means that you did not select the Disable checkbox.
6. Click **Update**.

## 4.16.2 Setting Up Home Page Message

The Home Page message is a "customized" message that is displayed in the upper right section of the home page. Administrators can create or edit this customized message using HTML tags. This does not override the personal home page setup, but adds the message in the main window. This message will be displayed for all users of the application.

This is an optional step.

### **Forms Navigation**

Administration > takes you to HTML

### **Forms Responsibility**

Oracle Sales Administrator

### **HTML Navigation**

Administration > Sales > Home Page Message

### **Responsibility**

Oracle Sales Online Super User

### **Steps**

1. Enter a new message in the text box.  
Use HTML tags to customize the message, if desired.
2. Click **Update**.

### 4.16.3 Setting Up External Tools

External links provide salespeople with quick links (html and jsp only) to other applications which are used regularly (e.g., Expense Reporting).

You can configure links to external sites as well as other Oracle E-Business Suite applications. Additional examples might include Oracle iMeeting for collaborative selling or, a link to the Dun & Bradstreet database.

You may only call self-service functions or functions which call HTML or jsp pages.

"Out of the box", Oracle provides links to Oracle Projects, Dun and Bradstreet, Oracle Expenses, Oracle eTravel, Oracle iMeeting and Oracle Notifications.

### 4.16.4 Setting Up Links to External Sites

#### Forms Navigation

Administration > takes you to HTML

#### Forms Responsibility

Oracle Sales Administrator

#### HTML Navigation

Administration > Sales > External Tools

#### Responsibility

Oracle Sales Online Super User

#### Steps

1. Enter the following required fields:
  - **Category:** a free-form text entry that will be used to group links on the External Tools page that have the same value for Category. It should describe some attribute or property that the links share.
  - **Link text:** This text will show on the page.
  - **Link** (e.g., for a URL, <http://www.oracle.com>)
  - Set the Link Type to URL from the drop down list for links to url's. Select Function when linking to Oracle applications or to any custom application that has been registered as an Oracle function.

- Description: Enter a description so that users know what this link goes to and what to use it for.
2. Select the Enabled checkbox.
  3. Click **Update**.

## 4.16.5 Setting Up Links to ERP Applications

### Prerequisites

None

### Forms Navigation

Administration > takes you to HTML

### Forms Responsibility

Oracle Sales Administrator

### HTML Navigation

Administration > Sales > External Tools

### Responsibility

Oracle Sales Online Super User

### Steps

1. Enter the following required fields:
  - Category: a free-form text entry that will be used to group links on the External Tools page that have the same value for Category. It should describe some attribute or property that the links share.
  - Link text
  - Link (should be the function name of the ERP application page)
  - Description of this function
2. Choose Function in the Link Type drop down list.
3. Select the Enabled checkbox.
4. Click the **Update** button.

This tool is now available from the Home Page under Tools.

Users will only be able to access the ERP application if they have the appropriate responsibility for that application. In order to specify the responsibility for a user, in the FORMS application, choose "System Administrator" responsibility, then Security > Use > Define. Query on the user name and add in the responsibility and application name if they are not listed there.

Bounce the Apache server after making any changes to the tools administration.

## 4.16.6 Setting Up News

### **Applies to: Sales Online**

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

## 4.16.7 Setting Up Charts

### **Applies to: Sales Online**

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

### **HTML Navigation**

Profiles > Home Page

### **Responsibility**

Oracle Sales Online Super User

### **Steps**

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

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

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2. Add the following DISPLAY parameter immediately below the wrapper.bin variable.
  - a. `wrapper.env=DISPLAY=<xserver-hostname>:<xserver-displayport>`
3. Replace `<xserver-hostname>` and `<xserver-displayport>` with the machine name and port number where the X Server is running.

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

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

---



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

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

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

## 4.17 Enabling Default Responsibilities

Performing these steps will enable users to set a default responsibility within their available responsibilities.

### Prerequisites

None

### Steps

1. Log into the admin console using the 'SYSADMIN' account.
2. Navigate to Settings > Site Preferences > Interapplication Bar > Navigation Group Setup.
3. Enter a Group Name.
4. Enter a Description for the group.
5. Leave Status as Active.
6. Enter a value for the Display Order.
7. Click **Update**.
8. Click the Details icon to the right of the Group Name or click Navigation Group Details from the Side Navigation Menu.
9. Select the Application for the group.
10. Click **Update**.
11. This will create an application navigation list across the top of the screen. Click the application name to switch between two or more applications.

#### 4.17.1 Test Enabling of Default Responsibilities

1. Log into the application with a user account.
2. Navigate to Profile > Personalization > Navigation Preferences.
3. Select a Default responsibility associated with the application chosen for the group.
4. Click **Update**.
5. Log out and back in. The application associated with the new default responsibility should display.

## 4.18 Setting Up Menu Administration

### Applies to: Sales Online

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

**Forms Navigation**

Administration > takes you to HTML

**Forms Responsibility**

Oracle Sales Administrator

**HTML Navigation**

Administration > Sales > Menu Administration

**Responsibility**

Oracle Sales Online Super User

### 4.18.1 Resequence Side Panel Navigation Menus

You can use this feature to re-organize your side panel navigation menus.

**Steps**

1. Select a Menu Name from the drop down list.
2. Click **Go**.
3. Enter the desired sequence number in the Sequence field.
4. Click **Update**.

### 4.18.2 Change the Menu Name

You can use this feature to change the names of menus.

**Steps**

1. Select a Menu Name from the drop down list.
2. Click **Go**.
3. Enter the new menu name in the Attribute Text field.

For seeded menus, it is recommended that you do not change the Function Name.

4. Click **Update**.

### 4.18.3 Create a Parent Menu

You can use this feature to create parent menus. For example, if you want Classifications to become a parent menu of Relationships, indicate the parent and child menu relationship here.

#### Steps

1. Select a Menu Name for which you want to create a parent menu for from the drop down list.
2. Click **Go**.
3. Select the parent menu from the Parent Attribute drop down list. This parent attribute will become the parent menu of the menu you previously selected.
4. Click **Update**.

### 4.18.4 Create Your Own Menu Using Existing Pages

These steps apply only for adding pages already provided by Oracle to a side panel menu.

#### Steps

For adding pages already provided by Oracle to a side panel menu:

1. In the first blank line on the page, enter a Sequence number for the menu to appear in the side navigation panel. For example, if you have Menu A in sequence number 15 and Menu B in sequence number 20, you can fit Menu C in between A and B by entering 16 in the Sequence field.
2. Enter an attribute in the Attribute Field.
3. Enter the menu name that you want to display in the Attribute Text field.  
For seeded menus, it is recommended that you do not change the Function Name.
4. If you want this menu to be a child menu, select the parent menu from the Parent Attribute drop down list.
5. Click **Update**.

## 4.18.5 Create Your Own Menu Using Page You Have Created

### Steps

For adding pages you have written to a side panel menu:

1. Write a JSP. This must be written in the same way as the other Oracle Sales Online pages in order to create parent menus.
2. Create a function corresponding to this page.
3. Using Application Developer/System Administrator responsibility, add the function to the menu tree using the forms application.
4. Using System Administrator responsibility, create an AK.ATTRIBUTE (Region Attribute) with long label as the name of the function.
5. Using System Administrator responsibility, add the attribute to the region ASF.FUNC.SEC.REG.

After all steps are complete, you can use the menu administration page to add the new page to a side panel menu.

Reference: *Oracle Applications System Administrator's Guide* for instruction on adding a menu to a tree and creating an attribute.

## 4.19 Setting Up CRM Foundation Modules

### Applies to: Sales Online, TeleSales

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

The following modules are optional:

- Notes
- Interactions
- Tasks
- Calendar
- Fulfillment

- Territory Manager

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

## 4.19.1 Setting Up Notes

### Forms Navigation

CRM Foundation > Notes Setup

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

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

## 4.19.2 Setting Up Interaction Tracking

### Forms Navigation

CRM Foundation > Interaction History Administration

All E-Business Suite applications, including sales applications, can record the interactions users have with customers and prospects and track the outcome of those interactions. Currently, Oracle Sales Online users cannot create or update interaction items.

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

## 4.19.3 Setting Up Tasks

### Forms Navigation

CRM Foundation > Task Manager

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

## 4.19.4 Setting Up the Calendar

### Forms Navigation

CRM Foundation > Calendar Setup

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

## 4.19.5 Setting Up CRM Foundation Fulfillment

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

## 4.20 Setting Up Territories

### Applies to: Sales Online, TeleSales

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

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

- [Section 4.20.1, "Setting Up and Using Territory Assignment Program \(TAP\)"](#)

### Navigation

CRM Foundation > Territory Manager > Territory Administration

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

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

- Postal code
- Area code
- Country

- **Company size**

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

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

For the most current documentation regarding Territory Manager, please refer to the Implementing Territory Manager section of the *Oracle CRM Applications Foundation Implementation Guide*.

### **Guidelines for Sales Applications**

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**Note:** The only category of resources that the TAP program supports is Employees.

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

The account transaction type gives you maximum flexibility. If you select account, then you can:

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

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

---

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

- What qualifiers you can select on the Qualifier tab to assign your territories.
- What type of access you can assign to different resources on the Resources tab.

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

- You can only use account and lead qualifiers to set up the territory.
- You can only assign resources to access leads, not customer or opportunity information.

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

- You can only use account and opportunity qualifiers to set up the territory.
- You can only assign resources to access opportunities, not customer or opportunity information.

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

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### Available Transaction Qualifiers

Oracle sales applications support the following transaction qualifiers for creating territories: See [Section 4.20.16, "Transaction Qualifiers" on page 4-215](#)

## 4.20.1 Setting Up and Using Territory Assignment Program (TAP)

This topic covers the Territory Assignment Program (TAP). The information included in this topic is intended to help you understand TAP and show you the necessary steps to implement TAP. See the following links:

- [Intended Audience on page 4-200](#)
- [TAP Definition on page 4-200](#)
- [TAP Guidelines on page 4-201](#)

- [Step 1: Setting Up a User Defined Name on page 4-204](#)
- [Step 2: Setting Up an Effective End Date on page 4-205](#)
- [Step 3: Setting Up a Transaction Type on page 4-205](#)
- [Step 4: Setting Up Transaction Qualifiers on page 4-206](#)
- [Step 5: Setting Up Resources on page 4-207](#)
- [Setting Up Resource Teams and Groups for TAP on page 4-207](#)
- [Step 6: Setting Up an Access Type on page 4-209](#)
- [Running Concurrent Programs on page 4-210](#)
- [Setting Profile Options on page 4-213](#)
- [Tables Used on page 4-214](#)
- [Transaction Qualifiers on page 4-215](#)
- [Frequently Asked Questions on page 4-217](#)
- [About Qualifiers on page 4-218](#)
- [Troubleshooting on page 4-224](#)

## 4.20.2 Intended Audience

This documentation is intended for use by a person with knowledge of the Oracle Sales Online application. It is helpful, but not mandatory, that you review the *Oracle CRM Application Foundation Implementation Guide*, "Territory Manager" section first.

Intended audience includes, but is not limited to:

- System Administrators
- Oracle Sales Consultants
- Implementation Experts

## 4.20.3 TAP Definition

The Territory Assignment Program is used to assign opportunities, leads, or customers, to a sales resource automatically (by running a concurrent program) by territory. Territories are defined by selecting qualifiers (parameters), through the Oracle Forms application, during the implementation process. This is a mandatory step in implementing and using Oracle Sales Online.

There are three types of TAP. two are available from the batch program:

- **Total Mode:** Processes all records and all territories. Run with a new implementation or after major changes have been made to territory definitions.
- **New Mode:** Only processes changes made since the last time you ran the concurrent program Assign Territory Accesses. Run frequency is based on your business needs.

The following mode is not available from the batch program:

- **Online (Real Time) Mode:** Process automatically assigns resources to transactions as they are created if one of the associated profiles OS: Enable Real Time Customer Assignment, OS: Enable Real Time Opportunity Assignment, or OS: Enable Real Time Lead Assignment is set to "Yes".

### **Login Responsibility**

Oracle Sales Administrator

### **Navigation**

Forms > CRM Foundation > Territory Manager > Territory Administration

### **Reference**

For additional information, please see the *Oracle CRM Application Foundation Implementation Guide, "Territory Manager"*.

## **4.20.4 TAP Guidelines**

The following are guidelines for using and implementing the Territory Assignment Program.

### **User Defined Name**

Territories consist of a user defined name. For example, "Southwest" or "Northwest".

### **Effective End Date**

Territories have an "effective end date". This end date indicates the end date for the territory, which ends the assignment of opportunities, leads, and customers to that territory.

### **Transaction Qualifiers**

Territories have "qualifiers". These qualifiers are parameters with which the program uses to assign opportunities, leads, and customers to a sales resource. For example, "State = California" or "Opportunity Amount > 50,000". There are approximately 30 qualifiers. You can use multiple qualifiers to define a territory.

### **Assigned Resources**

Territories have resources assigned to them. This means that if a qualifier is met, then the program will assign the resource to the opportunity, lead, or customer.

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**Note:** The only category of resources that the TAP program supports is Employees.

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### **Transaction Type**

Territories have transaction types. The transaction types are, Account (Customer), Opportunity, and Lead. Sales team resources are assigned to one or more of these transaction types. Transaction types dictate which qualifiers (rules) that you can use.

### **Access Type**

Sales resources have access types. The access types are, Account, Opportunity, and Lead. Access types are not related to qualifiers. You can use one or more access types.

## **4.20.5 Prerequisites for Online (Real Time) TAP**

The Territory Assignment Program is based on the implementation of Oracle CRM Application Foundation. After implementing Oracle CRM Application Foundation, you can proceed with setting up TAP.

- [Section 4.20, "Setting Up Territories"](#)
- [Section 4.20.13.1, "JTF: Generate Territory Packages"](#)
- [Additional Prerequisite for Online TAP](#)

### **Additional Prerequisite for Online TAP**

To make Real Time Customer Assignment work you will need the following setup:

- HZ: Execute API Callouts must be set to "Y"
- OS: Enable Real Time Customer Assignment must be set to "Y"

Navigate to System Administration > Workflow > Find Event Subscription > hzcrmhk\_pkg and change the phase as described below:

Event	Function	Phase
oracle.apps.ar.hz.ContactPoint.create	hz_crmhk_pkg.create_contact_point_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.ContactPoint.update	hz_crmhk_pkg.update_contact_point_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Location.update	hz_crmhk_pkg.update_location_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Organization.create	hz_crmhk_pkg.create_organization_post	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Organization.update	hz_crmhk_pkg.update_organization_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.PartySite.create	hz_crmhk_pkg.create_party_site_pos	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Person.create	hz_crmhk_pkg.create_person_post	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Person.update	hz_crmhk_pkg.update_person_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Relationship.create	hz_crmhk_pkg.create_party_relationship_pre	1
	hz_crmhk_pkg.create_party_relationship_post	2
	hz_event_elt.hz_param_delete	3
oracle.apps.ar.hz.Relationship.update	hz_crmhk_pkg.update_party_relationship_pre	1
	hz_crmhk_pkg.update_party_relationship_post	2

Event	Function	Phase
	hz_event_elt.hz_param_delete	3

- The phase for "hz\_event\_elt.hz\_param\_delete" should always be the highest.

#### 4.20.6 Prerequisites for Batch Mode TAP

The Territory Assignment Program is based on the implementation of Oracle CRM Application Foundation. After implementing Oracle CRM Application Foundation, you can proceed with setting up TAP.

- [Section 4.20, "Setting Up Territories"](#)
- [Section 4.20.13.1, "JTF: Generate Territory Packages"](#)

#### 4.20.7 Step 1: Setting Up a User Defined Name

Territories consist of a user defined name. For example, "Southwest" or "Northwest".

**Applies to: Sales and TeleSales**

##### Prerequisites

CRM Foundation, see "Enabling Existing Qualifiers"

##### Navigation

Double-click CRM Foundation > Territory Manager > Territory Administration > Oracle Sales and TeleSales

##### Steps

1. Click **Administration**.
2. Select **Define Territory**.
3. Enter a name for the new territory. This is a required field.

## 4.20.8 Step 2: Setting Up an Effective End Date

Territories have an "effective end date". This end date indicates the end date for the territory, which limits the assignment of opportunities, leads, and customers to that territory.

**Applies to: Sales and TeleSales**

### Prerequisites

CRM Foundation

### Navigation

Double-click CRM Foundation > Territory Manager > Territory Administration > Oracle Sales and TeleSales

### Steps

1. Click **Administration**.
2. Select **Define Territory**.
3. Optionally, enter an End Date for this territory.

The Start Date defaults to the date in which you are creating this territory.

## 4.20.9 Step 3: Setting Up a Transaction Type

Territories have a transaction type. The transaction types are, Account (Customer), Opportunity, and Lead. Transaction types govern which qualifiers (rules) that you can use. For example, if you select Opportunity as the transaction type, you will be able to select only from the qualifiers associated with the Opportunity transaction type.

**Applies to: Sales and TeleSales**

### Prerequisites

CRM Foundation

### Navigation

Double-click CRM Foundation > Territory Manager > Territory Administration > Oracle Sales and TeleSales

### Steps

1. Click **Administration**.
2. Select **Define Territory**.
3. In the Transaction Type table, select from Account, Lead, or Opportunity.
4. Add transaction types on remaining blank lines, if desired.

## 4.20.10 Step 4: Setting Up Transaction Qualifiers

Territories have "qualifiers". These qualifiers are parameters that the program uses to assign opportunities, leads, and customers to sales resources. For example, "State = California" or "Opportunity Amount > 50,000". There are approximately 30 qualifiers. You can use multiple qualifiers to define a territory.

**Applies to: Sales and TeleSales**

### Prerequisites

CRM Foundation

### Navigation

Double-click CRM Foundation > Territory Manager > Territory Administration > Oracle Sales and TeleSales

### Steps

1. Click **Administration**.
2. Select **Define Territory**.
3. Select the Transaction Qualifiers tab.

If this territory is part of a hierarchy of territories, click the **Show Inherited Qualifiers** button to examine which qualifiers this territory has inherited from its parent territory.

4. Enter the values and operators for each qualifier.

If you want to enter overlapping values for a qualifier, then check the Overlap Allowed check box.

## 4.20.11 Step 5: Setting Up Resources

Territories have sales resources assigned to them. This means that if a qualifier is met, then the program will assign the resource to the opportunity, lead, or customer.

### **Applies to: Sales and TeleSales**

### **Prerequisites**

CRM Foundation

### **Navigation**

Double-click CRM Foundation > Territory Manager > Territory Administration > Oracle Sales and TeleSales

### **Steps**

1. Click **Administration**.
2. Select **Define Territory**.
3. Select the **Resources** tab.
4. Select the resources for the territory using the list of values in the Name field.
5. Enter the group level from the list of values in the Group field.
6. Enter a role from the list of values in the Role field. (Not used by Oracle Sales Online.)
7. Select access type from the list of values in the Access Type field.

### **4.20.11.1 Setting Up Resource Teams and Groups for TAP**

#### **Prerequisite**

Resource Groups and Sales Groups must be set up in CRM Foundation in order to use this feature with TAP.

#### **Sales Group Support in TAP**

When a sales group is assigned to a territory, members of the group will be added to the sales team if:

- Usage of the group is Sales
- Member is an Employee and has a Sales role

The following members of a group will not be added to the sales team:

- Members who belong to a parent or child of the group
- Inactive members
- Members who are not employees
- Member having inactive Sales roles
- If member already exists on the sales team for the same group (in case of customer sales team, same group having default role)

The following changes will take effect only when TAP is run in Total mode. New mode TAP will not be able to handle these changes unless JTF Resources writes the changes in `jtf_terr_rsc_all`.

- If a member is removed or added in the sales group
- If the group is disabled
- If the group usage is changed

Once a group is removed or added to a territory, the changes will take effect after TAP is run in Total or New mode.

Online TAP will uptake this functionality as well.

Sales team tab doesn't support this functionality.

### **Resource Group Support in TAP**

A resource group consists of one or more individual resources as well as sales groups.

When a resource team is assigned to a territory, members of the sales team will be added to the sales team if :

- Usage of the resource team is Sales
- If member is Individual then he/she is an Employee and has a Sales role
- If member is a group then:
  - Usage of the group is Sales
  - Member of the group is an Employee and has a Sales role

The following members of the resource team will not be added to the sales team:

- Inactive members

- Members who are not employees
- Members not having Sales roles
- Member having inactive Sales roles
- If already exist on the sales team for same group ( in case of customer sales team, same group having default role) groups not having sales usage members who belong to parent or child of the group (if member is a group).

The following changes will take effect only when TAP is run in Total mode. New mode TAP will not be able to handle these changes unless JTF Resources write the changes in `jtf_terr_rsc_all`:

- If resource team is disabled
- If resource team usage is changed
- If a member is removed or added in the resource team or in the sales group which is member of the resource team
- If the group is disabled
- If the group usage is changed

Once the resource team is removed or added to a territory, the changes will take effect after TAP is run in Total or New mode.

Online TAP will uptake this functionality as well.

Sales team tab supports this functionality with the following differences:

- Sales team tab supports partners within a resource team, TAP will not (as TAP does not process partners).
- Sales team tab does not support groups within a resource team, TAP will support groups within a resource team.

#### 4.20.12 Step 6: Setting Up an Access Type

Sales resources have access types. The access types are, Account, Opportunity, and Lead. Access types are not related to qualifiers. You can use one or more access types for a territory definition.

## **Applies to: Sales and TeleSales**

### **Prerequisites**

CRM Foundation

### **Navigation**

Double-click CRM Foundation > Territory Manager > Territory Administration > Oracle Sales and TeleSales

### **Steps**

1. Click **Administration**.
2. Select **Define Territory**.
3. Select the **Resources** tab.
4. Select access type from the list of values in the Access Type field.

## **4.20.13 Running Concurrent Programs**

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

Run the following concurrent programs:

- [JTF: Generate Territory Packages](#)
- [Assign Territory Accesses \(ASTATA\)](#)

### **4.20.13.1 JTF: Generate Territory Packages**

After defining territories, you must run the Generate Territory Package concurrent program. If you do not run this program, the changes you have made will not take effect. Run this program every time a territory is added or changed.

Generate Territory Packages does the following:

- Builds the API that returns the winning territories, which are defined in territory setup.
- Creates search index for faster performance.

## Responsibility

Oracle Sales Administrator

## Navigation

Functions > Concurrent Requests > Run

## Steps

1. Select **Single Request**.
2. Enter "Generate%".
3. Click **Find**.
4. Select **Generate Territory Packages**. This will display the parameters panel.
5. Select the following:
  - Usage: Oracle Sales and TeleSales
  - Transaction Type: Lead
  - Record Limit: 10
  - Debug Flag: No
  - SQL Trace: No
6. Click **Submit**.
7. Repeat with "Transaction Type" equal to "Opportunity" and "Account".

### 4.20.13.2 Assign Territory Accesses (ASTATA)

When run in total mode, ASTATA populates JTF input tables (JTF\_TAE\_1001\_ACCOUNT/OPPOR/LEAD\_TRANS) with active customers, opportunities, and leads. A user hook is available before and after this program.

## Responsibility

Oracle Sales Administrator

## Navigation

Functions > Concurrent Requests > Run

## Steps

1. Select **Single Request**.

2. Enter "Assign%".
3. Click **Find**.
4. Select **Assign Territory Accesses**. This will display the parameters panel.
5. Select the following:
  - Run Mode: Total (total mode)
  - Debug: Yes
  - SQL Trace: Yes
  - Lead Status: Open (this depends on what leads you want to process)
  - User Hook Parameter 1
  - User Hook Parameter 2
  - User Hook Parameter 3

If you have implemented user hooks that will pass information that require parameters, then use them here. If you have not implemented user hooks then no information will pass.

6. Click **Submit**.

This process spawns the following "Generate Access Records" program.

**Generate Access Records (ASTGAR) automatically runs after ASTATA**

ASTGAR calls JTF API which populates the winning territory table (JTF\_TAE\_1001\_ACCOUNT/OPPOR/LEAD\_WINNERS) based upon territory definitions. The program then inserts, updates, or deletes AS\_ACCESSSES\_ALL and AS\_TERRITORY\_ACCESSSES tables to make assignments.

## 4.20.14 Setting Profile Options

The following table displays the profile options associated with TAP.

Profile Name	Description	Setting Level	Default Value
HZ: Execute API Callouts	If the value is set to "Yes", then changes made to customer records will be considered while TAP processing in New Mode. The value must be set to "Yes" for New Mode TAP to work.	User/Responsibility/Application/Site	No
OS: Enable Real Time Customer Assignment	If the value is set to "Yes", then resources are assigned as soon as a transaction is created or updated.	Site	No
OS: Enable Real Time Opportunity Assignment	If the value is set to "Yes", then resources are assigned as soon as a transaction is created or updated.	Site	No
OS: Enable Real Time Leads Assignment	If the value is set to "Yes", then resources are assigned as soon as a transaction is created or updated.	Site	Yes
OS: Disable Batch Mode Lead Assignment	If the value of this profile option is "Yes" then TAP concurrent program (Assign Territory Accesses Program) will not assign resources to leads. If the value is "No", then the program will assign resources to leads.	Site	Yes
OS: Territory Minimum Number of Records for Parallel Processing	Obsolete	Obsolete	Obsolete
OS: Territory Number of Child Processes	Obsolete	Obsolete	Obsolete
OS: Territory Records to Open for Processing Changed Accounts	Obsolete	Obsolete	Obsolete
OS: Territory Records to Commit	Obsolete	Obsolete	Obsolete

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**Note:** For information on setting profile options, please refer to the *Oracle Sales Online Implementation Guide*.

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#### 4.20.15 Tables Used

The following is a list of the read and write tables used in this process.

Read or Write	Table
Read	JTF_TAE_1001_ACCOUNT_TRANS
Read	JTF_TAE_1001_OPPOR_TRANS
Read	JTF_TAE_1001_LEAD_TRANS
Read	JTF_TAE_1001_ACCOUNT_WINNERS
Read	JTF_TAE_1001_OPPOR_WINNERS
Read	JTF_TAE_1001_LEAD_WINNERS
Read	JTF_TERR_QTYPE_ALL
Read	JTF_TERR_USGS_ALL
Read	JTF_TERR_ALL
Read	JTF_QUAL_TYPE_USGS_ALL
Read	JTF_QUAL_USGS_ALL
Read	JTF_TERR_QUAL_ALL
Read	JTF_TERR_QTYPE_USGS_ALL
Read	JTF_TERR_VALUES_ALL
Read	JTF_TERR_RSC_ACCESS_ALL
Read	JTF_TERR_RSC_ALL
Read	JTF_TERR_CHANGED_ALL
Read	JTF_RS_RESOURCE_EXTNS
Read	JTF_RS_ROLE_RELATIONS
Read	JTF_RS_ROLES_B

Read or Write	Table
Read	JTF_RS_ROLES_TL
Read	AS_INTERESTS_ALL
Read	AS_LEADS_ALL
Read	AS_LEADS_LINES
Read	AS_LAST_RUN_DATES
Read	AR_LOOKUPS
Read	HZ_ORGANIZATION_PROFILES
Read	HZ_PARTY_SITES
Read	HZ_PARTIES
Read	HZ_PARTY_SITES
Read	HZ_LOCATIONS
Read	HZ_CONTACT_POINTS
Read	HZ_RELATIONSHIPS
Read	FND_PROFILE_OPTION_VALUES
Read	FND_PROFILE_OPTIONS
Read	FND_USER
Write	AS_ACCESSES_ALL
Write	AS_TERRITORY_ACCESSES
Write	AS_CHANGED_ACCOUNTS_ALL

#### 4.20.16 Transaction Qualifiers

Territories have "qualifiers". These qualifiers are parameters that TAP uses to assign opportunities, leads, and customers to a sales resource. For example, "State = California" or "Opportunity Amount > 50,000". You can use multiple qualifiers to define a territory. There are approximately 30 qualifiers, see the table below for qualifier name, type, and description.

Name	Type	Available	Supported
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Account Classification	Account	=	=
Account Code	Account	=, <>	=
Account Hierarchy	Account	=, <>	=
Area Code	Account	=, BETWEEN, LIKE, <>, NOT BETWEEN, NOT LIKE	=, BETWEEN
City	Account	=, <>	=
County	Account	=, <>	
Customer Category	Account		
Customer Name	Account		
Customer Name Range	Account	=, BETWEEN, LIKE, <>, NOT BETWEEN, NOT LIKE	=, BETWEEN, LIKE
Number of Employees	Account	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN
Postal Code	Account	=, BETWEEN, LIKE, <>, NOT LIKE	=, BETWEEN
Province	Account	=, <>	=
SIC Code	Account	=, <>	=
State	Account	=, <>	=
Budget Amount	Lead	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN
Lead Expected Purchase	Lead	=	=
Lead Inventory Item	Lead	=, <>	=
Lead Promotion Identifier	Lead	=, <>	=
Purchase Amount	Lead	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN
Opportunity Channel	Opportunity	=, <>	=
Opportunity Classification	Opportunity	=	=
Opportunity Expected Purchase	Opportunity	=	=

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Opportunity Inventory Item	Opportunity	=, <>	=
Opportunity Promotion Identifier	Opportunity	=, <>	=
Opportunity Status	Opportunity	=, <>	=
Sales Partner Of	Account	=, <>	=
Total Amount	Opportunity	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN

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- **Available Operators:** Available from Territory Manager while setting up territories.
- **Supported Operators:** TAP only supports (assigns) these operators.

## 4.20.17 Frequently Asked Questions

The following topics cover frequently asked questions about Territory Assignment Program or related topics.

### 4.20.17.1 Question: Does TAP assign partners to opportunities?

**Answer:**

Territory assignment does not assign partners to opportunities based on the territory definition.

### 4.20.17.2 Question: What is Territory Manager?

**Answer:**

Territory Management is used to automatically assign sales, service, and collection teams based on their availability and expertise. It can also be used to make sales, service and collections information more secure by restricting personnel access to customer data.

Please refer to the *Oracle CRM Application Foundation Implementation Guide* for information about setting up territory manager.

### 4.20.17.3 Question: How often should I run the “Generate Territory Package” concurrent program?

#### **Answer:**

Run this program every time a territory is added or changed.

“Generate Territory Packages” builds the API that returns the winning territories and resources, and creates a search index for faster performance.

## 4.20.18 About Qualifiers

Qualifiers are the rules that determine where the resources are assigned. Set up is done by system administration when setting up territories.

The following section contains qualifiers that are commonly problematic for users.

They include:

- [Account Classification](#)
- [Account Hierarchy](#)
- [Area Code](#)
- [Sales Partner Of](#)
- [SIC Code](#)
- [Customer Category](#)
- [Opportunity Classification](#)

### 4.20.18.1 Account Classification

You can define a territory based upon site classification.

#### **How to Create Data for Account Classification**

1. Create Classification.
  - Go to Administration tab
  - Click Interest
  - Create Company Classification
2. Classify a site (attach classification to a customer record)
  - Login to OTS application

- From eBusiness Center, query the organization
  - Click Details button
  - Go to Site Classification tab
  - Enter interest type
  - Go to Location field and select the address
  - Save
3. Create a territory with Account Classification qualifier
- Go to the Territory Administration form, define a territory, for Account Classification qualifier. From LOV select the Interest type and codes combination for the classification.

#### **How TAP Processes Account Classification Qualifier**

If a territory is defined with Account Classification qualifier then TAP finds out customer locations for which classification is defined that matches the territory definition and assign resources to them.

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**Note:** You can't create site classification in OSO. Location is not a mandatory column in OTS Site Classification TAB. Account classification Qualifier will not work unless Location field is populated.

If territory is defined as combination of some other address related qualifier (e.g. State, Country, Postal Code etc.) and Account Classification qualifier then make sure that the address entered in Location field in OTS Site Classification TAB satisfies the address related qualifier.

In OSO 11.5.6.18 a new Company Classification TAB is introduced based upon TCA classification. The Account classification qualifier has no relation to this TAB.

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#### **4.20.18.2 Account Hierarchy**

You can define territory based upon Parent Subsidiary relationship between organizations.

#### **How to Create Data for Account Hierarchy**

1. Create Account Hierarchy
  - Go to the Customer tab and drill down to the subsidiary organization in the relationship. Select the parent Organization in the relationship and create the Subsidiary Of relationship between the two organizations.
2. Create a territory with Account Hierarchy qualifier
  - Go to the Territory Administration form, define a territory, for "Account Hierarchy" qualifier. From the LOV, choose the subsidiary organization of the relationship as the qualifier value.

### **Example**

If ABC Company is subsidiary of XYZ Company and XYZ Company is Subsidiary of LMN Inc., then:

1. Drill down to customer detail page for ABC Company.
  - Create a relationship of "Subsidiary Of" with XYZ Company
  - Similarly, drill down to customer detail page for XYZ Company
  - Create a relationship of "Subsidiary Of" with LMN Inc.
2. Go to Define Territory form, create a territory.
  - Set up Account Hierarchy qualifier as follows:
  - Account Qualifier = ABC Company

### **How TAP Processes Account Hierarchy Qualifier**

If there is a parent subsidiary relationship between two organizations then set up the subsidiary organization as territory qualifier value. TAP finds parent (up in the hierarchy) of the organization that is set as territory qualifier and assign resources to it.

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**Note:** Only parties that have a "SUBSIDIARY OF" relationship with other parties, appear in LOV in Define territory form.

If the "Create Party Flag" is set to "N" for the Subsidiary Of relationship then the relationship type will not be available in Customer tab in the application while creating relationship

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#### 4.20.18.3 Area Code

You can define a territory based upon area code customer's primary telephone number at the or at the header level.

##### How to Create Data for Area Code

1. Create a territory with Area Code qualifier.

In the Define Territory form, choose Area Code qualifier. There is no LOV associated with this qualifier. Enter area code of primary phone at any active address or the Header level.

##### How TAP Processes Area Code Qualifier

If a territory is defined with Area Code qualifier then TAP finds matching records that have customer's primary phone same as the qualifier value.

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**Note:** If territory is defined as combination of some other address related qualifier (e.g. State, Country, Postal Code etc.) and Area Code qualifier then make sure that the phone area code at such address is same as the value defined for Area Code qualifier. If you want to use this qualifier for opportunity or leads assignment then make sure that the address attached to opportunity and leads satisfy the qualifier value.

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#### 4.20.18.4 Sales Partner Of

You can define a territory based upon partner assigned to a customer, opportunity, or lead.

##### How to Create Data for "Sales Partner Of" Qualifier

1. Create a partner

You can create sales partners through the Partner tab.

2. Assign Partner to a transaction (customer, opportunity, and leads)  
Go to the External Sales Team of Customer, Opportunity, or Leads tab in Oracle Sales Online and add this partner to their sales team.
3. In the define territory form, choose the "Sales Partner Of" qualifier. From the list of values, choose the partner which is assigned to transaction in Step 2 above.

#### **How TAP Processes "Sales Partner Of" Qualifier**

If a "Sales Partner Of" qualifier is defined, then TAP finds transactions having external sales teams that match the "Sales Partner Of" qualifier. TAP then assigns resources to these transactions based upon the territory definition.

#### **Example**

ABC Company is partner of LMN, Inc. A customer AAA Insurance is created with address in California (CA) state. Opportunity "Hardware and Consulting" is created for customer AAA Insurance at above address. The user adds partner ABC Company to the external sales team of the opportunity and customer.

Territory T1 is defined with following Qualifier:

Partner\_of ABC Company

State CA

Following Resources are assigned to Territory T1

R1

R2

When TAP runs, it adds R1 and R2 to the sales team of customer AAA Insurance and opportunity "Hardware and Consulting".

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**Note:** If a territory is defined as a combination of some other address related qualifier (e.g., State, Country, or Postal Code) and "Sales Partner Of" qualifier then customer, opportunity, or Lead address (not partner address) should satisfy all conditions.

Unless Partner relationship created from Customer tab of the application correspond to a resource of category "Partner" in JTF resources, it will not appear in the LOV while defining the qualifier.

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#### 4.20.18.5 SIC Code

You can define a territory based upon SIC Code of a Customer.

##### **How to Create Data for SIC Code Qualifier**

1. Create SIC Codes in AR lookups for SIC Code Type "1987 SIC" .
2. Assign the SIC Code Type "1987 SIC" and appropriate SIC codes to the customers.
3. Define a territory with SIC Code qualifier, select SIC code from LOV.

##### **How TAP Processes SIC Code Qualifier**

The LOV for Territory Qualifier displays only SIC codes for 1987 SIC Type. If SIC Code qualifier is defined then TAP finds customer records that satisfy this condition and assign resources to it.

#### 4.20.18.6 Customer Category

You can define a territory based upon Category of customer.

##### **How to Create Data for Customer Category Qualifier**

1. Create Customer categories in AR lookups
2. Assign Customer Category to customers
3. Define a territory with Customer Category qualifier, select the Customer Category from LOV.

##### **How TAP Processes Customer Category Qualifier**

If Customer Category qualifier is defined then TAP finds customer records that satisfy this condition and assign resources to it.

#### 4.20.18.7 Opportunity Classification

You can define a territory based upon Classification of an opportunity.

##### **How to Create data for Opportunity Classification**

1. Navigate to the Administration tab.
2. Create an Opportunity Classification.
3. Create an opportunity.
4. From the Opportunity detail page, click on the Classification cue card. Enter the Opportunity Classification.
5. Create a territory with transaction type "Opportunity".
6. Select Opportunity Classification qualifier and enter the classification.

##### **How TAP processes Opportunity Classification Qualifier**

If a territory is defined with Opportunity Classification qualifier then TAP finds out matching opportunities and assigns resources to them.

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**Note:** Opportunity classification is different than opportunity product category. For example, TAP will not consider any purchase items entered for the opportunity while processing this qualifier.

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### 4.20.19 Troubleshooting

The following section is intended to provide information to help you if you encounter a problem with Territory Assignment Program set ups.

Follow these guidelines and provide the information that is requested from the following queries:

1. Log files with the "Debug" option turned "On".
2. Trace files in case of performance issues or if the program terminates with errors.
  - Run tkpof with following options and send us the output files SORT = exeela fchela EXPLAIN = apps/psswd SYS = no
3. Output of the following queries:

Query Name	Query
Records in HZ_PARTIES	<pre>select party_type, count(*) from apps.hz_parties where STATUS = 'A' group by party_type select count(*) from hz_party_sites where status = 'A' select count(*) from hz_locations</pre>
Volume of Opportunities and Leads	<pre>select count(lead_id) from apps.as_leads_all select count(sales_lead_id) from apps.as_sales_leads</pre>
Volume of Access Records	<pre>Select count(*) from AS_ACCESSSES_ALL Select count(*) from AS_TERRITORY_ACCESSSES</pre>
Volume of Changed Accounts prior to run (required only for New Mode)	<pre>Select request_id, sequence, count(*) from AS_CHANGED_ACCOUNTS_ALL group by request_id, sequence</pre>
Database Parameters	<pre>select name, value from V\$PARAMETER where UPPER(name) in ('HASH_AREA_SIZE', 'SORT_AREA_SIZE')</pre>
Duplicate Active Organization Profiles	<pre>select party_id from hz_organization_profiles where sysdate between nvl(effective_start_date, sysdate-1 ) and nvl(effective_end_date,sysdate+1 ) group by party_id having count(*) &gt; 1</pre>
Number of ACTIVE Sales Territories	<pre>select count(*) from apps.jtf_terr_all jta, apps.jtf_terr_usgs_all jtua where jtua.terr_id = jta.terr_id and jtua.source_id = -1001 and jta.start_date_active &lt;= SYSDATE AND NVL(jta.end_date_active, SYSDATE) &gt;= SYSDATE</pre>
Number of VALID Sales Territories for Assignment	<pre>select jtdr.qual_type_id, count(*) from apps.jtf_terr_denorm_rules_all jtldr where jtldr.source_id = -1001 and jtldr.terr_id = jtldr.related_terr_id group by jtldr.qual_type_id</pre>

Query Name	Query
Number of VALID Sales Territories with Reps for Assignment	<pre>select jtdr.qual_type_id, count(*) from apps.jtf_terr_denorm_rules_all jtdr where jtdr.source_id = -1001 and jtdr.terr_id = jtdr.related_terr_id and jtdr.resource_exists_flag = 'Y' group by jtdr.qual_type_id</pre>
Total # of Territory Resource Assignments	<pre>select count(*) from apps.jtf_terr_rsc_all jtr where jtr.start_date_active &lt;= SYSDATE AND NVL(jtr.end_date_active, SYSDATE) &gt;= SYSDATE AND EXISTS ( SELECT jtdr.terr_id FROM jtf_terr_denorm_rules_all jtdr WHERE jtdr.source_id = -1001 )</pre>
Total # of DISTINCT Territory Resources (Total # of Active Reps)	<pre>SELECT COUNT (*) FROM ( select DISTINCT jtr.resource_id, jtr.resource_type from apps.jtf_terr_rsc_all jtr where jtr.start_date_active &lt;= SYSDATE AND NVL(jtr.end_date_active, SYSDATE) &gt;= SYSDATE AND EXISTS ( SELECT jtdr.terr_id FROM jtf_terr_denorm_rules_all jtdr WHERE jtdr.source_id = -1001 ) )</pre>
Total Number of Values in System	<pre>select count(*) from jtf_terr_values_all jtv, jtf_terr_qual_all jtq where jtv.terr_qual_id = jtq.terr_qual_id and jtq.terr_id IN ( select jt.terr_id from apps.jtf_terr_all jt, apps.jtf_terr_usgs_all jtu where jtu.source_id = -1001 and jtu.terr_id = jt.terr_id and jt.start_date_active &lt;= SYSDATE AND NVL(jt.end_date_active, SYSDATE) &gt;= SYSDATE )</pre>

Query Name	Query
Total Number of Values per each Qualifier in System	<pre>select jtq.qual_usg_id, count(*) from jtf_terr_values_all jtv, jtf_terr_qual_all jtq where jtv.terr_qual_id = jtq.terr_qual_id and jtq.terr_id IN ( select jt.terr_id from apps.jtf_terr_all jt, apps.jtf_terr_usgs_all jtu where jtu.source_id = -1001 and jtu.terr_id = jt.terr_id and jt.start_date_active &lt;= SYSDATE AND NVL(jt.end_date_active, SYSDATE) &gt;= SYSDATE ) group by jtq.qual_usg_id order by 1 desc</pre>
Total Number of values per Qualifier in MV	<pre>select mv.qual_usg_id, count(*) from jtf_terr_qual_rules_mv mv group by mv.qual_usg_id order by 1 desc</pre>
Distinct Qualifier Operators	<pre>SELECT jtv.comparison_operator, COUNT(*) FROM apps.jtf_terr_values_all jtv GROUP BY jtv.comparison_operator</pre>

## 4.21 Creating Custom JSP Pages

Use the following procedure to create custom JSP pages and append the page to the bottom of an existing Oracle Sales Online page.

### Applies to: Sales Online

### Responsibility

Application Developer and Application Developer Common Modules

### Steps

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

**Responsibility:** Application Developer

**Navigation:** Application > Function > Web HTML tab

2. Create an AK attribute.

**Responsibility:** Application Developer Common Modules

**Navigation:** Define Attributes

- a. Confirm that the attribute ID is the function name of the JSP page with the suffix "\_C\_J\_I". The attribute ID may be the attribute name.
  - b. Select the application name, Oracle Field Sales.
  - c. Select the data type VARCHAR2.
  - d. Set the value length to any number. This field is not used.
  - e. In the label column, type in the name of the custom JSP page that you want to create. The JSP page must be in the OA\_HTML directory.
3. Repeat Step 2 for all custom JSP pages that you want to create.
  4. Create an AK region.

**Responsibility:** Application Developer Common Modules

**Navigation:** Define Regions

- a. Confirm that the region ID is ASF\_CUSTOM\_JSP\_INCLUDES.
  - b. Select the application name, Oracle Field Sales.
  - c. Select the object name, ICX\_PROMPTS.
  - d. Set the region style to any style. This field is not used.
  - e. Add the attributes that you defined as region items for this region. Click the Region Item button on the form.
5. Bounce the Apache server.

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

## 4.22 Adding a Custom Report to Report Listings

**Applies to:** Sales Online

Some reports are shipped as part of this product. They are listed under each tab under the Reports subtab in the Report Listing Pages. If you create a custom report and want it to display on the Reports subtab, follow these steps to add the report:

## Steps

1. Create a JSP for users to enter their search criteria. This page is called the ParameterPage. The page needs to have a filter section if saved query is needed for this particular report.
2. Create another JSP to show the report data. This page is called the ResultPage.
3. Create one FND function for each of those two pages. Add the ParameterPage's function under ASF\_XXXXX\_REPORTS menu. XXXXX may be "CUSTOMER", or "LEAD", and so on.
4. You can use function exclusions on responsibilities to control which responsibility cannot see which reports. For more details about how to exclude FND functions from some responsibilities, please refer to the CRM Foundation documentation.
5. If no saved query is used for this report, you can stop here. Otherwise, please continue to the next step.
6. Create a default saved query for that report. When you visit the ParameterPage for the first time, you will see seeded parameters based on this default saved query. This can be done by modifying a Java program and run it against customer's database.
7. Each report needs to have a unique query type. For example, you may choose to give your report a query type QTQT.
8. Register in AK the attribute of the name of this report type and put it in the region "ASF\_REPORT\_NAMES"
9. In JTA property manager, you will need to do the following things:
  - To create a new value (QTQT) for your report query type in the value set of the property "querytype.<xxx>reports". <xxx> can be customer, lead, forecast or opp.
  - To create a new value for your report query type in the value set of the property "querytype.reports" (same value as the previous one, QTQT.)
  - To create a new JTA property called "querytype.QTQT.desc". And add the following values for this property.

```

sectionname$<sn>
parameterpage$<pp>
resultpage$<rp>
tab$<t>
name$<name>

```

<sn> is the section name of the filter section in ParameterPage.

<pp> is the FND function name of ParameterPage, defined in Step 3.

<rp> is the FND function name of ResultPage, defined in Step 3.

<t> is the tab function name to be highlighted for this query type, like ASF\_OPPORTUNITES.

<name> is the AK attribute name for the name of this report type.

10. Change oracle.apps.asf.util.ReportNameHash to reflect the changes in AK as well. This step will be obsolete after OSO Profile page has taken the new report registration method with JTA's Property Manager.

## 4.23 Excluding Tabs and Functions

Function security is the mechanism by which user access to applications functionality is controlled.

The Oracle Applications GUI-based architecture aggregates several related business functions into a single form. Because all users should not have access to every business function in a form, Oracle Applications provides the ability to identify pieces of applications logic as functions. When part of an application's functionality is identified as a function, it can be secured (i.e., included or excluded from a responsibility). This security is thoroughly described in the Oracle Applications System Administrator's Guide, Release 11i.

The goal of this topic is to give you a brief overview so that you understand the concept behind this action. Refer to the *Oracle Applications System Administrators's Guide*, Release 11i for more detailed information.

### Terms

**Function:** A function is a part of an application's functionality that is registered under a unique name for the purpose of assigning it to, or excluding it from, a responsibility.

**Menu:** A menu is a hierarchical arrangement of functions and menus of functions. Each responsibility has a menu assigned to it.

**Responsibility:** A responsibility defines an application user's current privileges while working with the application. When an application user signs on, they select a responsibility that grants certain privileges, specifically:

- The functions that the user may access. Functions are determined by the menu assigned to the responsibility.
- The concurrent programs, such as reports, that the user may run.
- The application database accounts that forms, concurrent programs, and reports connect to.

### 4.23.1 Excluding Tabs

#### Steps

1. Create a new menu.
2. Identify menus corresponding to the tabs or subtabs that you wish to exclude.
3. Save your work.

### 4.23.2 Preventing Users From Accessing Specific Functions

#### Steps

1. Navigate to the responsibility that you want to update.
2. Identify the functions that you want to exclude by entering the name of the function.
3. Save your work.

#### 4.23.2.1 To find function names

#### Steps

These instructions are for JSP pages developed with Oracle Sales Online framework only. Applications using this framework include ASF, ASM, AMF, IBC, AST, CN, and BIL.

A system administrator can find a function name of an Oracle Sales Online framework page following these steps:

1. Login to the application and navigate to the desired page;
2. Read the URL. It should say “http://...../<a file name, with .jsp>?.....”
3. Go to \$HTML\_TOP, open that file, and search for a line saying  
.....setFunctionName(“<a function name>”).

That is the function name for the page.

---

---

**Warning:** If this function is to be excluded, you need to bounce the application server to see that change. Also, if this page is accessible from hyperlinks or buttons, those hyperlinks or buttons will not function after this function is excluded. It is recommended that you test all pages from which this excluded page may be reached before excluding the function.

---

---

### Reference

Refer to the *Oracle Applications System Administrator's Guide* for complete information about function security.

## 4.24 Setting Up Partners

### Applies to: Sales Online, TeleSales

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

Partners may be of the following types:

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

Refer to the *Oracle Partners Online Implementation Guide* for information about setting up Partners.

## 4.25 Setting Up Marketing Source Codes

### Applies to: Sales Online, TeleSales, Field Sales

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

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

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

Because all campaigns are not created alike, custom setups are available to easily configure campaigns for different activities and marketing channels.

Campaigns often create a hierarchical structure. Campaigns may be divided by geography or by product or by marketing channel. Campaigns are developed using a parent child relationship. A parent campaign may have many child campaigns. A child campaigns may in turn, be a parent campaign as well.

The execution of a campaign may be further broken down by schedule. A schedule determines when, where and how a campaign activity is executed. A particular campaign may have multiple schedules for many different marketing channels and for execution of a campaign over a period of time.

Refer to *Oracle Marketing Online Implementation Guide* and *Oracle Marketing Online User Guide* for information on how to set up marketing source codes.

You must also set up the following system profiles:

- OS: Source Code Mandatory for Leads
- OS: Source Code Required for Opportunity

## 4.26 Setting Up Marketing Encyclopedia System

**Applies to: TeleSales, Sales Online**

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia System User Guide*.

## 4.27 Setting Up Incentive Compensation

### **Applies to: Sales Online, TeleSales**

Oracle Incentive Compensation is an application within the Oracle E-Business Suite. The application can be deployed as a stand alone module or in combination with other Oracle applications to meet your solution requirements.

With Oracle Incentive Compensation, new incentive programs are configured with ease, approved online, and deployed worldwide. As sales transactions are received, the appropriate credits are accurately distributed and calculated according to the structure of the organization and the specific agreements that are in place. The sales organization receives up to the minute feedback on performance and earnings through self-service reports.

The architecture allows the application to be deployed for any size organization without the inherent limitations of spreadsheets, custom applications, or client server applications. Oracle Incentive Compensation is unmatched in its ability to support the global enterprise. Multiple currencies and languages are supported in a single database instance.

Refer to the *Oracle Incentive Compensation Implementation Guide* for information about setting up Incentive Compensation.

## 4.28 Adding Competitors to Marketing

### **Applies to: Sales Online, TeleSales**

Before you can choose competitors from competitor field LOVs, the competitors must be set up in Oracle Marketing Online. See the documentation for Oracle Marketing Online.

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# Implementation Tasks for Oracle TeleSales

This chapter covers how to implement Oracle TeleSales. The procedures are listed in the suggested implementation order following the tasks covered in [Chapter 4, "Implementing Oracle Sales Applications"](#). For a complete checklist of ordered steps, please see [Chapter 3, "Implementation Overview"](#). Perform the following tasks:

- [Section 5.1, "Setting Up Quick Menu"](#)
- [Section 5.2, "Hiding and Setting Default Tabs"](#)
- [Section 5.3, "Setting Up Custom Tabs"](#)
- [Section 5.4, "Setting Up Forms Integration with HTML-based Applications"](#)
- [Section 5.5, "Setting Up Mapping Capability for Addresses in eBusiness Center"](#)
- [Section 5.6, "Setting Up Universal Work Queue"](#)
- [Section 5.7, "Setting Up Marketing Events"](#)
- [Section 5.8, "Setting Up Marketing Collateral"](#)
- [Section 5.9, "Setting Up Scripting"](#)
- [Section 5.10, "Setting Up Call Center and Advanced Outbound and Advanced Inbound"](#)
- [Section 5.11, "Setting Up Campaign Assignments"](#)
- [Section 5.12, "Enabling Oracle eMail Center"](#)
- [Section 5.13, "Enabling Interaction Tracking and Wrap-up"](#)
- [Section 5.14, "Enabling Web Directory Assistance"](#)
- [Section 5.15, "Setting Up Relationship Plan"](#)

- [Section 5.16, "Setting Up Address Validation"](#)
- [Section 5.17, "Setting Up the Dashboard"](#)

## 5.1 Setting Up Quick Menu

**Applies to: TeleSales**

### Responsibility

System Administrator

### Forms Navigation

Profiles > System

Set the system profile option `OTS: Start menu in QuickMenu` to the out-of-box menu defined by `OTS: TeleSales Quick Menu`.

System Administrators can create their own menus and add functions to the menu. Only the seeded functions will carry the context from eBusiness Center to the called form. The menu can be set for the profile at any of the 4 levels. For details about quick menu refer to *Service Implementation Guide*.

## 5.2 Hiding and Setting Default Tabs

**Applies to: TeleSales**

You can determine which tabs a user can view in the eBusiness Center, the Lead Center and the Opportunity Center windows.

You can hide and expose tabs through menu and function exclusions when you set up responsibilities. If you exclude a tab, then that tab is hidden from view. Tabs cannot be permanently removed from the eBusiness Center, nor can the order of the tabs be changed.

See the *Managing Oracle Applications Security* chapter of the *Oracle Applications System Administrator's Guide*.

### Login

Log in to Oracle Forms.

### Responsibility

System Administrator

## **Navigation**

Security > Responsibility > Define

## **Steps**

1. Use Query Enter and Query Run to locate the responsibility.
2. Choose TeleSales in the Application fields.
3. If you want to exclude a tab, then go to the Excluded Items tab and select the tab from the LOV.

## **eBusiness Center**

The tabs available for eBusiness Center are:

- eBC Overview Tab
- eBC Dashboard Tab
- eBC Organization Tab
- eBC Person Tab
- eBC Address/Phone Tab
- eBC Relationships Tab
- eBC Account Tab
- eBC Lead Tab
- eBC Opportunity Tab
- eBC Quote/Order Tab
- eBC Event Tab
- eBC Collateral Tab
- eBC Task Tab
- eBC Note Tab
- eBC Service Request Tab
- eBC Contract Tab
- eBC Install Base Tab

- eBC Custom Tab 1
- eBC Custom Tab 2
- eBC Collection Profile Tab

Profile: OTS: Default Tab in eBusiness Center: Sets the tab that appears when the window is opened.

### **Opportunity Center**

The tabs available for the Opportunity Center are:

- Opportunity Center Notes Tab
- Opportunity Center Purchase Tab
- Opportunity Center Classification Tab
- Opportunity Center Sales Team Tab
- Opportunity Center Obstacle Tab
- Opportunity Center Task Tab
- Opportunity Center Lead Tab
- Opportunity Center Quote/Order Tab
- Opportunity Center Partner Tab
- Opportunity Center Contact Tab
- Opportunity Center Closing Tab

Profile: OTS: Default Tab in Opportunity Center: Sets the tab that appears when the window is opened.

If the profile option PV: CM Approval Required is set to Yes, then the routing flag is disabled. If it is set to No, then the routing flag is enabled.

### **Lead Center**

Tabs available for Lead Center:

- Lead Center Purchase Interest Tab
- Lead Center Contact Tab
- Lead Center Sales Team Tab
- Lead Center Task Tab

- Lead Center Note Tab
- Lead Center Opportunity Tab

Profile: OTS: Default Tab in Sales Lead Center: Sets the tab that appears when the window is opened.

### Universal Search

Profiles:

- OTS: Default Universal Search Type
- OTS: Default Universal Search Tab

Sets the defaults that appear when the search is opened.

### Guidelines

The following table shows what tabs should be shown or hidden for sales users or non-sales users.

**Table 5–1 Sales or Non-sales Users Show or Hide Tabs**

<b>Tab</b>	<b>Sales User</b>	<b>Non-Sales User</b>
Overview	Show	Show
Dashboard	Show	Show
Organization	Show	Show
Person	Show	Show
Address	Show	Show
Relationship	Show	Show
Lead	Show	Hide
Opportunity	Show	Hide
Event	Show	Show
Collateral	Show	Show
Task	Show	Show
Note	Show	Show
Collection	Show	Show
Service Request	Show	Show

**Table 5–1 Sales or Non-sales Users Show or Hide Tabs**

<b>Tab</b>	<b>Sales User</b>	<b>Non-Sales User</b>
Contract	Show	Show
Install Base	Show	Show
Custom 1	Show	Show (based on customization)
Custom 2	Show	Show (based on customization)

## 5.3 Setting Up Custom Tabs

### Applies to: TeleSales

Implementers can create two custom tabs in the eBusiness Center window by modifying the code for the eBusiness Center form and the associated library.

The customization must be made on a view or table which has a reference or intersection with HZ\_PARTIES. The fields that can be displayed in the custom tabs will be based on this view or table.

The implementer must use public APIs provided by Development to perform transactions against this table. Code for Insert, Update, and Delete is built into these APIs.

All steps must be performed every time you change your custom forms or libraries.

### Prerequisites

Knowledge of Forms development, Oracle Applications procedure, and understanding of Oracle coding standards.

Before you implement customizations, backup your files.

### Steps

1. Customize the form:
  - Create a Data block with all the fields that are needed for displaying in the custom tab. This must be done in the form ASTCUTM1.fmb or ASTCUTM2.fmb.
  - *On Insert* trigger must be coded for the data block to insert data into the tables with the corresponding public API call.

- *On Update* trigger must be coded for the data block to update data into the tables with the corresponding public API call.
  - *On Delete* trigger must be coded for the data block to delete data from the tables with the corresponding public API call.
  - The fields in the data block must be placed on the canvas "ASTRCALL\_STACKED\_CUSTOM1" (if using ASTCUTM1.fmb) or "ASTRCALL\_STACKED\_CUSTOM2" (if using ASTCUTM2.fmb).
  - Any record groups and LOVs must be coded as needed for the fields displayed on the canvas. Out of the box, there are some fields displayed on the canvas for demo purposes. These fields can be removed from the canvas if not needed.
  - In order to integrate this with the eBusiness Center, the data block, record groups, and LOVs must be dropped in the "CUSTOM1\_OBJ\_GRP" (if using ASTCUTM1.fmb) or "CUSTOM2\_OBJ\_GRP" (if using ASTCUTM2.fmb) object group. This object group is already subclassed into the eBusiness center.
2. Modify the library:

Please add or change code in the package CUSTOMER\_PKG in ASTCUTM1.pld or CUSTOMER\_PKG2 in ASTCUTM2.pld to suit your specific needs based on the comments provided in the library.
  3. Set up the label for the custom tabs in the eBusiness Center:

Use the Telesales Administrator responsibility and launch the OTS: Quick Codes form. Search for the lookup type called *eBC Tab Labels*. Change the meaning of the lookup code ASTRCALL\_ASTCUTM1 (for ASTCUTM1.fmb) or ASTRCALL\_ASTCUTM2 (for ASTCUTM2.fmb) to the desired name. This changes the tab name in the eBusiness center.
  4. Integration into eBusiness center:

The form can be compiled and run stand-alone for testing purposes.

To integrate the custom tab into eBusiness center, perform the following steps:

    - a. Copy the forms ASTCUTM1.fmb and/or ASTCUTM2.fmb to the `$AU_TOP/forms/US` directory in the patched environment.
    - b. Compile the corresponding library and copy ASTCUTM1.pll and/or ASTCUTM2.pll to the `$AU_TOP/resource` directory in the patched environment.

- c. Please run the **adadmin** utility to compile AST forms and libraries so that the changes made to the Customer Form and Library are reflected in the eBusiness Center.

### Important Note

Please back up these custom forms and libraries before applying any AST patches that include these files as these will be over-written in `$AU_TOP/forms/US` and `$AU_TOP/resource`. After the patch is applied successfully, please copy the customized files back to these directories and run **adadmin** to generate AST forms and libraries.

If there is a bug fix associated with the custom forms and libraries, the custom changes need to be made to the newer version of the files to reflect the bug fix in the customized tabs.

## 5.4 Setting Up Forms Integration with HTML-based Applications

### Applies to: TeleSales

To be able to launch JSP pages from Forms-based Oracle eBusiness Suite applications, including Oracle Sales Online, you must set up the following system profile options:

- Apps Servlet Agent

Set this profile to the URL of the Apache server. For example:

```
http://ap084sun.us.oracle.com:7777/OA_HTML
```

Please refer to the *Oracle Applications Implementation* guide for more information.

- OTS: JSP Details

Set this profile to yes to enable opening Oracle Marketing Online when user double-clicks a source code or source name in the eBusiness Center.

- OSO: Application Utility Class

Set this profile to: `oracle.apps.asf.Util.OsoAppUtility`. This profile setting is required if you want to be able to view the Oracle Sales Online application.

- FUNCTION\_SECURITY\_REGION

Set this profile at the Application level for the TeleSales application to: `ASF_FUNC_SEC_REG`. This profile setting is required if you want to be able to view the Oracle TeleSales home page.

## 5.5 Setting Up Mapping Capability for Addresses in eBusiness Center

### Applies to: TeleSales

You can make it possible for agents using the eBusiness Center to obtain maps of addresses in the Address tab. Agents can double click on the concatenated address field and be launched to the mapping service of your choice.

To set up the link between the application and the mapping service, you must set up the profile option: `OTS: URL to Display a Map Of The Address`.

For example, you can link to Yahoo Maps by entering the following URL:

```
http://maps.yahoo.com/py/maps.py?BFCat=&Pyt=Tmap&newFL=Use+Address+Below&addr=ADDRESS1&csz=@CITY+@STATE+@POSTAL_CODE&Country=@COUNTRY&Get%AOMap=Get+Map
```

You pass parameters to the mapping service via the following URL variables. All of them start with the @ sign:

- @COUNTRY
- @COUNTY
- @POSTAL\_CODE
- @PROVINCE
- @STATE
- @CITY
- @ADDRESS4
- @ADDRESS3
- @ADDRESS2
- @ADDRESS1

When this profile is set, agents viewing an address in the Address tab of the eBusiness Center see a green hyperlinked address field. This is the link they can use to launch the mapping service. If the profile is not set, then the address field is not hyperlinked.

## 5.6 Setting Up Universal Work Queue

### **Applies to: TeleSales**

Refer to the *Oracle Universal Work Queue Implementation Guide* for information about setting up the Universal Work Queue.

The profile option *IEU: Non-Media: Navigate* determines whether a new application window is opened every time the user selects a new work item. Set to Yes to tell UWQ to reuse the same application window when a user selects a new work item. Set to No if you want UWQ to open a new additional window when users select a new work item. Set to Yes to save computer resources. The profile option can be set at the site, application, responsibility, and user levels.

## 5.7 Setting Up Marketing Events

### **Applies to: TeleSales**

Use this procedure to set up events.

### **Prerequisites**

- You must be set up as a user for Oracle Marketing Online.
- You must have the URL for Oracle Marketing Online.

### **Steps**

1. Create the event according to *Oracle Marketing User Guide*. Make sure of the following:
  - The event you create is active and you specify the event start date and end date.
  - You must enter a valid registration start date and end date. The registration start date cannot be earlier than today's date.
2. Log into Oracle applications again as a System Administrator.
3. Navigate to **Profile > System**.
4. Set the following profiles:
  - *OTS: Default Event Reply to Email Address*. Enter the email address you want event enrollees to use for replying to enrollment confirmation e-mails.

- *OTS: Default Event Subject Line.* Enter the subject line for the enrollment confirmation email.

## 5.8 Setting Up Marketing Collateral

### Applies to: TeleSales

Use this procedure to set up collateral for Oracle TeleSales this includes collateral sent with events. You can set up either physical collateral such as brochures, books, CDs, or electronic collateral which consist of e-mails and other files you create. Physical collateral is managed via Oracle Inventory. Electronic collateral is managed by the Fulfillment CRM foundation module. Much of the initial collateral setup is done in Oracle Marketing Online according to the procedures you can find either in the *Oracle Marketing Online Concepts and Procedures* or in the online help system. Please note that Oracle Marketing Online uses the term deliverable instead of collateral. This means that you must follow the procedures for creating deliverables.

### Prerequisites

- You must complete Marketing Campaign implementation before setting up collateral.
- You must complete an Oracle Inventory implementation before setting up physical collateral.
- You must be set up as a user for Oracle Marketing Online.
- You must have the URL for Oracle Marketing Online.

### Steps

1. Navigate to **Profiles > System**.
2. Set up the following system profile options:
  - *OTS: Default Shipping Method for Electronic Collateral.* This profile sends the default fulfilment method for electronic collateral.
  - *OTS: Default Shipping Method for Physical Collateral.* This sets the default shipping method which can be changed by the agent sending collateral.
  - *OTS: Default Cover Letter for Collateral Requests.* This profile assigns a default cover letter for sending electronic collateral.
  - *AMS: Should Call To Inventory Modules To Be Made.* Set to *Yes*.

- AMS: Should Call To Pricing Modules To Be Made. Set to **Yes**
  - OTS: Default Collateral Reply To Email Address. This setting is required for sending electronic collateral. Enter the email address you want collateral recipients to use when replying with collateral confirmation emails.
  - OTS: Default Collateral Subject Line. This setting is required for sending electronic collateral. Enter the subject line you want collateral recipients to use when replying with collateral confirmation emails.
3. If you are creating physical collateral then:
- a. Set the profile AMS: Item Validation Master Organization to your inventory organization.
  - b. Log into Oracle Marketing Online's HTML interface.
  - c. Create the deliverable in the Create Deliverable window of Oracle Marketing Online selecting the Physical radio button.
  - d. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters DELV.
  - e. Navigate to **Inventory > Items > Master Items**.
  - f. Select the inventory organization for your collateral. You must select the inventory organization set up as the default organization in an Oracle Marketing Online. Please refer to *Oracle Marketing Online Implementation Guide* for more information about the default setting and the system profile where it is set.
  - g. Use the Item List of Values (LOV) to enter the Item. As the LOV lists all of the items in your inventory, you may want to limit your search to DELIV%.
  - h. If the collateral is going to be shipped from multiple warehouses, then from the Tools menu choose Organization Assignment and assign the appropriate warehouses. See *Oracle Inventory User's Guide* for more information.
  - i. On the Main tab, use the Lists of Values (LOVs) to enter **Each** as the unit of measure. **Finished good** as the User Item Type and **Active** as the status. The **Both** radio button is selected by default.
  - j. On the Inventory tab, select the Inventory Item, Stockable, and Transactable check boxes.

- k. On the Costing tab, select the Costing Enabled, Inventory Asset Value, and Include in Rollup check boxes.
- l. On the Purchasing tab, select the Purchased and Purchasable check boxes.
- m. On the Order Management tab, select the Customer Ordered, Customer Orders Enabled, and Shippable radio buttons and enter the Default Shipping Organization.
- n. On the Invoicing tab, select the Invoicable Item and Invoice Enabled check boxes.
- o. Click **Save** on the toolbar.
- p. Navigate to **Inventory > Transactions > Miscellaneous Transactions**.
- q. Use the Type LOV to enter `Miscellaneous receipt`.
- r. Click **Transaction Lines**.  
The Miscellaneous Receipt window opens.
- s. Use the LOV to enter the item.
- t. Use the Sub Inventory LOV to enter **Stores**.
- u. Enter the quantity of the item in inventory.

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**Note:** You must enter a quantity for the item in Inventory. Entering a quantity in Oracle Marketing Online is not sufficient.

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- v. Use the Account Alias LOV to enter `Miscellaneous`.
  - w. Save your work.
4. If you are creating electronic collateral then:
- a. Follow the procedures described in the Fulfillment chapter of Oracle CRM Application Foundation Implementation Guide. This chapter explains both how to set up the fulfillment server and how to create your electronic collateral ready for mail merge.
  - b. Create the deliverable in the Create Deliverable window of Oracle Marketing Online selecting the Electronic radio button.
  - c. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number

read only field. This automatically-generated part number starts with the letters DELV.

---

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**Note:** If no part number appears, then the collateral item will not be available within Oracle TeleSales.

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## 5.9 Setting Up Scripting

### **Applies to: TeleSales**

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures* to set up scripts for your agents.

Set profile options according to how you want scripting to work.

- If you want the script launched automatically when a call is received and if there is a script associated with the source code, then set the following profile options:
  - Set *OTS: Script Launch on UWQ Delivery* is set to Yes
  - Set *OTS: Script Launch on Interaction* is set to Yes
  - Set *OTS: Scripting Installation* is set to Yes
- If you want the script launched automatically when an interaction is started in eBusiness Center and if there is a script associated with the source code, then set the following profile options:
  - Set *OTS: Script Launch on Interaction* to Yes
  - Set *OTS: Scripting Installation* to Yes
- If you want the script to launch when you click the View Script button in eBusiness Center (the button is enabled only when there is a script associated with the sourcecode), then set the following profile options:
  - Set *OTS: Script Launch on Interaction* to Yes
  - Set *OTS: Scripting Installation* to Yes

## 5.10 Setting Up Call Center and Advanced Outbound and Advanced Inbound

### **Applies to: TeleSales**

Setting up Advanced Inbound involves the following steps.

1. Install Interaction Center Server Manager
2. Define the Oracle Interaction Center server group
3. Define and configure the Oracle Interaction Center server processes
4. Configure Oracle Universal Work Queue for inbound telephony
5. Verification using the switch simulator
6. Define and configure CTI middleware
7. Map IVR data to fields in Oracle Applications
8. Set up routing for inbound calls
9. Set up classifications
10. Set up media action and classification
11. Install Oracle Call Center Connectors

For details on these implementation tasks, refer to the *Oracle Advanced Inbound Implementation Guide*.

For Setting up Oracle Advanced Outbound, please refer to the *Oracle Advanced Outbound Implementation Guide*.

## 5.11 Setting Up Campaign Assignments

### **Applies to: TeleSales with Oracle Advanced Outbound**

This step is required only if you are implementing Oracle Advanced Outbound,

In this step you assign marketing source codes to individual sales agents or to whole sales groups. The sales groups are those groups or resources you have created using the Resource Manger, a component of CRM Foundation. Marketing source codes are created using Oracle Marketing Online.

You can either assign sour codes to individual agents or sales groups or assign agents or sales groups to individual source codes. Both procedures outlined below accomplish the same goal.

### 5.11.1 Assigning Marketing Source Codes to Agents

Use this procedure to assign source codes to agents or groups of agents.

#### HTML Navigation

Administration > Sales > Call Center > Campaign Assignment

#### Steps

The Campaign Assignment window appears.

#### Campaign Assignment

---

##### Assign To

- Resource
- Resource Group

Remove	Id	Resource

##### Current Campaign Assignments

---

First | Previous 0-0 of 0 Next | Last

Remove	Resource	Code	Name

First | Previous 0-0 of 0 Next | Last

1. If you want to assign campaign schedules to individual agents, then under the Assign to heading:
  - a. Select the Resource radio button under the Assign to heading.
  - b. Click **Go**.

The Resource LOV appears.

Resource Name :

## Resources

First | Previous 1-10 of 11 [Next](#) | [Last](#)

Select	Id	Name
<input type="checkbox"/>	100000016	Brown, Ms. Casey
<input type="checkbox"/>	10180	Daugherty, Mr. John
<input type="checkbox"/>	100000990	Dravid, Mr. Rahul
<input type="checkbox"/>	100000990	Dravid, Mr. Rahul
<input type="checkbox"/>	10127	Henry, Paul
<input type="checkbox"/>	100001260	Kate, Block
<input type="checkbox"/>	10181	McDonald, Robert
<input type="checkbox"/>	100000765	Stiles, Kelly
<input type="checkbox"/>	100000937	Taylor, Mr. Phillip Charles
<input type="checkbox"/>	100001689	Torres, Mr. Steven

First | Previous 1-10 of 11 [Next](#) | [Last](#)

- c. Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.
  - d. Click **Go**.
  - e. Select the individual's name from the list.
  - f. The Campaign Assignment window displays the individual's name in the text box. Any campaign schedules already assigned to that individual appear.
2. If you want to assign campaign schedules to sales groups, then under the Assign to heading:
    - a. Select the Resource Group radio button under the Assign to heading.
    - b. Click **Go**.  
The Resource Group LOV appears.

Resource Group Name :

## Resource Groups

First | Previous 1-4 of 4 Next | Last

Select	Id	Name	Description
<input type="checkbox"/>	10002	Key Accounts	Middle Tier Account
<input type="checkbox"/>	10002	Key Accounts	Middle Tier Account
<input type="checkbox"/>	100000027	Sales and Marketing	
<input type="checkbox"/>	100000006	Telesales group	Please do-not change (Comms-Products)

First | Previous 1-4 of 4 Next | Last

- c. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.
  - d. Click **Go**.  
A list of groups appears.
  - e. Select the group's name from the list.
  - f. The Campaign Assignment window displays the group's name in the text box. Any campaign schedules already assigned to that group appear listed below.
3. To assign campaign schedules to the individual or group:
    - a. Click **Add Campaign**.  
New lines appear under the Current Campaign Assignments heading.

### Current Campaign Assignments

Remove	Resource	Code	Name
<input type="checkbox"/>			<input type="text"/> Go
<input type="checkbox"/>			<input type="text"/> Go
<input type="checkbox"/>			<input type="text"/> Go

First | Previous 0-0 of 0 Next | Last

First | Previous 0-0 of 0 Next | Last

- b. Click **Go**.  
The Valid Campaign Schedule list appears.
- c. Select the name of the campaign schedule you want to assign.  
The schedule you selected displays on the Campaign Assignment window.
- d. Click **Update**.
- e. Repeat this procedure for each campaign schedule you want to assign.

## 5.11.2 Assigning Agents to Marketing Source Codes

Use this procedure to assign agents or groups of agents to individual marketing source codes.

### HTML Navigation

Administration > Sales > Call Center > Agent Assignments

### Steps

The Resource Assignment window appears.

The screenshot shows the Oracle Sales Online interface. At the top, the Oracle logo and 'Sales Online' are displayed. A navigation bar contains various tabs: Home, Calendar, Lead, Opportunity, Quote, Forecast, Customer, Partner, Compensation, Fulfillment, and Administration. Below this, a secondary navigation bar highlights 'Sales' and includes links for General, Marketing, Partner, Incentive, Collections, and Resources. On the left, a menu lists 'Menu Administration' (Home Page, Home Page Bins, External Tools, Home Page Message) and 'Sales Category' (Interest Type, Interest Code, Interest Status, Plan Element Mapping). The main content area is titled 'Resource Assignment' and features a 'Quick Find' search bar with 'Email' entered and a 'Go' button. Below the search bar, there is a 'Schedule Name' input field with a 'Go' button. A table with columns 'Remove', 'Id', and 'Schedule Name' is shown, with an 'Apply' button below it. Underneath, the 'Assign To' section has radio buttons for 'Resource' (selected) and 'Resource Group'. The 'Current Resource Assignments' section includes a table with columns 'Remove', 'Schedule Name', 'Resource Group', and 'Start Date'. Navigation links 'First | Previous 0-0 of 0 Next | Last' are present above and below the table. An 'Add Resource' button is located below the table, along with 'Update' and 'Restore' buttons.

1. If you know the campaign schedule name, then next to Schedule Name click **Go**.

A list of campaign schedules appears.

Campaign Schedule Name :

### Valid Campaign Schedules

First | Previous 1-1 of 1 Next | Last

Select	Id	Code	Name
<input type="checkbox"/>	10080	WORLD040200010	New Camp

First | Previous 1-1 of 1 Next | Last

2. You can also search by entering the name or a partial name of the campaign schedule in the Campaign Schedule Name field. You can use the % sign to substitute for missing characters and click **Search**.
3. Select the campaign schedule from the list and click **OK**.
4. The campaign schedule name populates the Campaign Name field.
5. If you want to assign an individual agent to the campaign schedule, then under the Assign to heading:
  - a. Select the Resource radio button.
  - b. Click **Add Resource**.

New lines appear in the Current Resource Assignments section.

### Current Resource Assignments

First | Previous 1-1 of 1 Next | Last

Remove	Schedule Name	Resource	Start Date
<input type="checkbox"/>	Vision Spring Specials 2002	Taylor, Mr. Phillip Charles	17-Feb-2002
<input type="checkbox"/>		<input type="text"/> <input type="button" value="Go"/>	
<input type="checkbox"/>		<input type="text"/> <input type="button" value="Go"/>	
<input type="checkbox"/>		<input type="text"/> <input type="button" value="Go"/>	

First | Previous 1-1 of 1 Next | Last

- c. **Click Go.**  
The Resources LOV appears.
  - d. Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.
  - e. **Click Go.**
  - f. Select the individual's name from the list.
6. If you want to assign sales groups to the campaign schedule, then under the Assign to heading:
  - a. Select the Resource Group radio button.
  - b. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.
  - c. **Click Go.**
  - d. Select the group's name from the list.  
The Resource Assignment window displays the name of the individual or group in the list of resources assigned to this campaign schedule.
7. **Click Update.**
8. Repeat this procedure for each campaign schedule you want to assign.

## 5.12 Enabling Oracle eMail Center

### **Applies to: TeleSales**

A Telesales Agent can click an e-mail address in Oracle TeleSales to open an e-mail addressed to the customer and send it through the eMail Center. The e-mail is then recorded as an interaction. Perform the following tasks to enable eMail Center:

1. Perform the implementation steps per Oracle Email Center documentation.
2. Set the system profile option *OTS: Enable Email Center Integration* to Yes.
3. For each TeleSales Agent, perform the following steps in Resources:
  - a. Select iCenter for Role Type.
  - b. Select eMail Center Agent for Roles.

## 5.13 Enabling Interaction Tracking and Wrap-up

### Applies to: TeleSales

Oracle TeleSales can track customer-related interactions by agents and record the outcome of those interactions, the wrap-up.

To set up interaction tracking you must:

1. Set up the system profiles telling the application what activities you want interactions to track. See [Section 5.13.2, "Deciding What Actions You Want Interactions to Track"](#) on page 5-25.
2. If desired, set up automatic interaction tracking. [Section 5.13.3, "Setting Up Oracle TeleSales to Track Interactions Automatically"](#) on page 5-28.
3. If you want agents to record the outcomes of their interactions on the wrap-up window, then:
  - a. You must create the categories of outcomes, results, and reasons the agents will use for their call wrap-up. See [Section 5.13.4, "Creating Outcomes, Results, and Reasons for Call Wrap-Up"](#) on page 5-30.
  - b. Optionally, you can restrict different outcomes to different campaign schedules. This way agents working on different marketing campaigns can have access to a different list of outcomes. See [Section 5.13.5, "Assigning Outcomes to Campaign Schedules"](#). on page 5-30.

### 5.13.1 Interaction Overview

Oracle TeleSales can track agent interactions with customers and the different activities within those interactions. The activities an interaction can track includes the modifying and closing of leads and opportunities, the enrollment of contacts in events, the mailing of collateral, the placing of calls to customers, and so on.

The interaction records an activity whenever an agent:

- Creates a new party of any party type.
- Creates a lead
- Ranks a lead
- Declines lead
- Creates an opportunity
- Closes an opportunity

- Enrolls customers or prospects in an event
- Cancels enrollment
- Sends collateral
- Creates a task

Each activity is itself composed of an action and the object of that action, this is called an "action item". Interactions track and record the following actions and action items.

Actions:

- Item added
- Lead ranked
- Lead declined
- Opportunity closed
- Event enrollment
- Event enrollment cancelled
- Item Sent
- Query

Action Items:

- Customer
- Lead
- Opportunity
- Event
- Collateral
- Task

Agents can start an interaction at any time while working in the Opportunity Center, the Lead Center, or the eBusiness Center, by clicking the Start Interaction button on the toolbar. When agents end the interaction by clicking on the Wrap-up button, they enter information about the outcome of the interaction in the wrap-up window. The interaction record lists all the activities the agent performed while the interaction was open.

You can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever an agent queries up or modifies a customer record and ends when an agent queries up a record belonging to another party, changes parties, or closes the form where the interaction began.

You can set up interactions to require agents to record the outcomes of their interactions with customers in a wrap-up window or merely record a default outcome.

### **How the Application Tracks Interaction Activities for Party Relationships**

Interaction activities recorded for any of the party types which make up a party relationship are recorded as being part of the same interaction. For example, if an agent starts tracking an interaction with Jim Jones, the CEO of Acme Corp., then any activity related to Jim Jones, Acme Corp., and Jim Jones, the CEO of Acme Corp., are treated as part of the same interaction. Switching between any of these parties does not close the interaction.

The customer model used by Oracle TeleSales treats any relationships you enter between individuals and organizations as a separate party in the database. For example, when the user creates a new record for Jim Jones, CEO of Acme Corp. the application creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

## **5.13.2 Deciding What Actions You Want Interactions to Track**

### **Forms Navigation**

Profiles > System

You must set up the following profile options which decide which activities record interactions. This applies to both manual and automatic interaction tracking.

- **OTS: Interactions -Generate Collateral Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Tracks activities related to collateral.

No: Disables interaction tracking for the creation of collateral orders.

- **OTS: Interactions -Generate Customer Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Tracks activities related to customer records.

No: Disables tracking of activities related to customer records.

- **OTS: Interactions -Generate Event Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Tracks activities related to events.

No: Disables tracking of activities related to events.

- **OTS: Interactions -Generate Lead Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Tracks activities related to leads.

No: Disables tracking of activities related to leads.

- **OTS: Interactions -Generate Opportunity Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Tracks activities related to opportunities.

No: Disables tracking of activities related to opportunities.

- **OTS: Interactions-Generate Task Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Records the creation of new tasks.

No: Disables the recording of task creation.

- **OTS: Interactions -Default Outcome**

Default setting: Maintenance

This profile determines the default value of the Outcome field in the wrap-up window.

This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome

associated with the campaign schedule for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign schedule.

If the default value for the profile option is removed, then the application functions as if the value is *Outcome with outcome id = 1 (No Answer)*.

- **OTS: Interactions -Default Action**

Default setting: Interact with the Item

Users must perform at least one activity for the interaction to end. If user doesn't perform any activity but ends the interaction anyway, then the application uses the default action set in this profile and the default action item from the profile OTS: Interaction -Default Action Item.

If the default value for the profile option is removed, then the application functions as if the value is *Query*.

- **OTS: Interactions -Default Action Item**

Default: Customer

The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction -Default Action whenever the user does not perform an action required to wrap up an interaction.

If the default value for the profile option is removed, then the application functions as if the value is the module name where the interaction is started. For example, if an interaction is started in opportunity center, then it is *Opportunity*.

- **OTS: Interactions -Record Media Item ID**

Default setting: Yes (If the default setting is removed, then the application operates as if the profile is set to Yes.)

Interactions track different types of communications with customers including emails and phone calls placed via Oracle inbound and outbound telephony applications. The record includes a unique identifier for the communication. This profile determines if that unique identifier is recorded or not. This identifier is never displayed for the user.

A setting of Yes records the identifier. A setting of No does not record the identifier.

- **OTS: Max Interactions Displayed**

Default setting: 10 (If the default setting is removed, then the application operates as if the profile is set to 10.)

Determines how many interactions to display in the overview tab.

- **OTS: Number of Months to View Notes and Interactions For**

Default setting: 1 (If the default setting is removed, then the application operates as if the profile is set to 1.)

This is the number of months of notes or interactions to view.

### 5.13.3 Setting Up Oracle TeleSales to Track Interactions Automatically

#### Forms Navigation

Profiles > System

To track interactions automatically, you must set up the following additional system profiles:

- **OTS: Interactions -Enable Automatic Start**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

A Yes setting for this profile option enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting interactions manually.

- **OTS: Interactions -Start on Query**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

A setting of Yes starts an interaction whenever the user displays a new record from a different party. For example, if the user is working on an opportunity for AT&T Corp. and opens up a lead from Acme Corp., then the application closes the first interaction and opens up a new one for Acme Corp. If both the opportunity and lead come from AT&T, then no new interaction is started.

A setting of No starts a new interaction only when the user updates or deletes information in a record or creates a new record for a new party. The user working on an opportunity for AT&T Corp. has to update the lead from Acme Corp. before the application starts a new interaction for Acme. Merely viewing the lead will not close the AT&T interaction.

- **OTS: Interactions -Enable Auto Wrapup**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

When this profile is set to No, the wrap-up window appears automatically prompting users to enter the outcomes and reasons for the activity.

When this profile is set to Yes, then the interaction ends automatically without the users seeing the wrap-up window.

The interaction ends when:

- The user starts work on a record from a different party.

Whether this happens on update or query depends on the setting of OTS: Interactions -Start on Query, as described above.

- The user closes the window where the interaction was started.

For example, if a user starts an interaction while viewing an opportunity in the Opportunity Tab of the eBusiness Center and then opens that same opportunity in the Opportunity Center, then the interaction does not end when the user closes the Opportunity Center. It ends only when the user closes the eBusiness Center.

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---

**Note:** In this release, the wrap-up screen appears automatically only when users close the form using the close button at the top right hand side of the form. If they close the form using the close button on the toolbar or by choosing Close Form from the File menu, then the interaction is closed automatically without opening the wrap-up window.

---

---

- **OTS: Interactions -Enable Change Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Set to Yes to allow allows user to change system recorded activities in the wrap-up window.

The following examples illustrate the use of these profile settings:

**Example: Enabling Automatic Interaction Tracking for Opportunities**

Imagine, for example, that you want to enable automatic interaction tracking for all agent activities relating to opportunities and you want the tracking to start whenever an agent updates a record. You want the tracking to happen in the background, without the agent having to perform any extra data entry.

You must set the following system profiles to the values indicated:

- **OTS: Interactions -Enable Automatic Start**  
Setting this profile to Yes enables the automatic tracking.
- **OTS: Interactions -Generate Opportunity Activity**  
Setting this profile to Yes enables the tracking of activities related to Opportunities.
- **OTS: Interactions -Start on Query**
- **Setting this profile to No** means that interaction tracking starts only when a record is updated for the first time.
- **OTS: Interactions -Enable Auto Wrapup**  
Setting this profile to Yes means that the interaction ends automatically without agents having to make entries in the wrap-up window.

The interaction ends automatically when the agent closes the window where the interaction was first started or changes the object the interaction relates to. For example, if a user opens up the eBusiness Center and from the Opportunity tab then opens the Opportunity Center, then the opportunity interaction ends when the user starts a new opportunity in the Opportunity Center.

Because the application must record at least one activity for an interaction to end, you must set up the default activity which is recorded if an agent closes a window without performing any of the activities. To set up the default activity, you must set two related profiles **OTS: Interactions Default Action** and **OTS: Interactions Default Action Item**.

#### 5.13.4 Creating Outcomes, Results, and Reasons for Call Wrap-Up

If you want agents to record the outcomes of interactions with customers using the wrap-up window, then you must populate the different lists of values the agents will use for that purpose. This means setting up the different outcomes, results, and reasons. See the Interaction History section of the *Oracle CRM Applications Foundation Implementation Guide* for details.

#### 5.13.5 Assigning Outcomes to Campaign Schedules

If you assign outcomes to marketing source codes, then agents who are working with customers classified by different source codes can have different outcome classifications available to them to wrap up calls. For example, you may want to use

"leave message" as a possible outcome for a customer satisfaction campaign, but not for a sales campaign.

Although sales agents see all marketing activities as source codes, you must assign the outcomes only to the marketing activity called a campaign schedule. Campaign schedules must be created in Oracle Marketing Online.

See the Interaction History section of the *Oracle CRM Applications Foundation Implementation Guide* for details.

The forms based administration windows for creating outcome, result, and reason are obsolete. The HTML pages now used to set these up are available using the web responsibility of Interaction History JSP Administration.

## 5.14 Enabling Web Directory Assistance

### **Applies to: TeleSales**

Use this procedure to enable web directory assistance for agents.

### **Prerequisites**

None

### **Login**

Log in to Oracle HTML Applications.

### **Responsibility**

Sales Administrator

### **Navigation**

Administration > Sales > Call Center > Web Assistance

### **Steps**

The Web Assistances page appears.



1. Click **Create Web Assistance**.

The Create Web Assistance page appears.

## Create Web Assistance

Enabled

Directory Assistance Flag

\*Proxy Host

\*Proxy Port

\*Search URL

Header Constant

Trailer Constant

\*Switch Separator

URL Separator

\* indicates required field.

- Using another browser window, navigate to the web directory assistance service you want to use.
- Perform a search for any individual. For example, for John Doe in California. Keep the page with the results open. You will need to refer to it for the rest of this procedure.

For example, navigate to [www.superpages.com](http://www.superpages.com), select the People Pages tab, and search for John Doe in California.

The search returns a page with the following URL:

```
http://wpg2.superpages.com/wp/results.phtml?SRC=&STYPE=WS&PS=15&PI=1&WF=John
&WL=Doe&T=&S=CA&search=Find&pow=0&rtid=wpg1.superpages.com
```

- In the Proxy Host field, enter the name of your organization's proxy server.
- In the Port field, enter the port number for the proxy server.
- In the Search URL field, enter the part of the URL before the question mark (?).  
In the SuperPages.com example, you copy and paste the following:  
`http://wpg2.superpages.com/wp/results.phtml`
- In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant when you perform different searches.

---

---

**Note:** You may need to perform additional searches to determine what portion of the URL remains constant.

---

---

In the SuperPages.com example this is: SRC=&STYPE=WS&PS=15&PI=1 .

8. In the Trailer Constant field, enter the constant part of the URL after the search terms.

In the SuperPages.com example this is:

&search=Find&pow=0&rtid=wpg1.superpages.com.

9. Enter the switch separator. The switch separator is always the ampersand (&).
10. Enter the URL separator. The URL separator is always the question mark (?).

### Create Web Assistance

Enabled	<input type="text" value="Y"/>
Directory Assistance Flag	<input type="text" value="Y"/>
*Proxy Host	<input type="text" value="proxy.com"/>
*Proxy Port	<input type="text" value="80"/>
*Search URL	<input type="text" value="http://wpg2.superpages"/>
Header Constant	<input type="text" value="SRC=&amp;STYPE=WS&amp;PS=15&amp;PI=1"/>
Trailer Constant	<input type="text" value="&amp;search=Find&amp;pow=0&amp;"/>
*Switch Separator	<input type="text" value="&amp;"/>
URL Separator	<input type="text" value="?"/>

\* indicates required field.

11. Click **Update**.

The Web Assistance page displays the web assistance you saved.

## Web Assistances

Create Web Assistance

Detail	Enabled	Directory Assistance Flag	Proxy Host	Proxy Port	Search URL	Header Constant	Trailer Constant	Switch Separator	URL Separator
<a href="#">Detail</a>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	proxy.com	80	http://wpg2.	SRC=&ST	&search=F	&	?

12. Click **Detail** for the web assistance you created.

The Web Assistance Details page appears.

## Web Assistance Details

CGI Switches

Web Assistance ID 10000

Enabled

Directory Assistance Flag

\*Proxy Host

\*Proxy Port

\*Search URL

Header Constant

Trailer Constant

\*Switch Separator

URL Separator

\* indicates required field.

Update Restore

13. Click **CGI Switches**.

The Oracle Collections Web Directory Administration page displays switch information for the web directory.

## Oracle Collections Web Directory Administration

Create

Save Reset

First | Previous 0-0 of 0 Next | Last

Enabled	Required	Switch Code	Data Separator	Sort Order	First Name	Last Name	City	State	Street	Zip	Country
---------	----------	-------------	----------------	------------	------------	-----------	------	-------	--------	-----	---------

Save Reset

First | Previous 0-0 of 0 Next | Last

14. Create each switch to include in the search. The switches are the CGI script variables used for your search criteria. Each switch is followed by an equals (=) sign. In the SuperPages.com example these are: WF, WL, T, and S. For each switch:

- a. Click **Create**.

The Create CGI Switch page appears.

i

### Create

Enabled

Required

\*Switch Code

\*Sort Order

Data Separator

First Name

Last Name

City

State

Zip

Street

Country

\* indicates required field.

Save Reset

- b. Enter the switch in the Switch Code field. The entry is case sensitive.
- c. Enter a number in the Sort Order field indicating the order this switch appears in the URL.
- d. Enter plus (+) for the data separator.
- e. Select Y next to the search criteria related to this switch. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.
- f. Set the Enable field to Y. Any disabled switch has a corresponding disabled field on the Directory Assistance page.
- g. If user entry for this switch is required by the web assistance service, then select Y for the Required field. Look on the search web page to find out what fields are required. In the SuperPages.com example last name is the required field.
- h. Click **Update**.

The Web Assistance Details page displays the new switch.

15. After testing your settings, set Enabled to Y.

---

---

**Note:** You can enable only one service at a time.

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16. Select yes or no for the directory assistance flag. Only one web directory can be used for directory assistance.
17. Click **Update** to save your changes.

## 5.15 Setting Up Relationship Plan

Oracle TeleSales uses the relationship plan feature in Oracle Customer Care. Follow the implementation steps in the *Oracle Customer Care Implementation Guide* if you want to use this feature.

## 5.16 Setting Up Address Validation

Address validation is used for ensuring that the combination of different components of an address is correct. For example, City = Redwood Shores , State = CA, Postal Code = 94065 should be in a valid combination for a given address in the

United States. This is enforced based on the profile option *OTS: Enable Address Validation*.

Address validation is used when creating a location for which the Address Style descriptive flexfield has not been set up. The validation is based on the tax location flexfield structure set up using the System Options form in the Receivables Manager responsibility. For details refer to the *Oracle Receivables Tax Manual*.

## 5.17 Setting Up the Dashboard

Follow the instructions in the *Oracle TeleService Implementation Guide* to set up the dashboard.

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# Implementation Tasks for Oracle Field Sales/Wireless

This chapter covers how to install and implement Oracle Field Sales/Wireless. The procedures are listed in the suggested implementation order. For a complete checklist of ordered steps, please see [Chapter 3, "Implementation Overview"](#). Perform the following tasks:

- [Section 6.1, "Installing Field Sales/Wireless"](#)
- [Section 6.2, "Setting Up Field Sales/Wireless"](#)
- [Section 6.3, "Setting Up the Wireless Edition Server"](#)
- [Section 6.4, "Creating Master Documents for Fulfillment \(Optional\)"](#)

## 6.1 Installing Field Sales/Wireless

### **Applies to: Field Sales/Wireless**

Oracle's Mobile Sales products were created to give salespeople easy access to sales related data while they are traveling. Sales representatives can create, view, and update customer sales information on a Laptop, Palm, or Wireless device without a network connection. Information is accessed and stored locally and later synchronized with Oracle's eBusiness Suite. During synchronization, the sales rep also receives updated information from the E-Business Suite.

Field Sales/Wireless provides this same functionality to view and update customer information on a wireless handheld device, however, the main difference is that the access is real-time through wireless networks.

### **Login**

System Administrator

### **Responsibility**

Sales Online Super User

### **Prerequisites**

Installing and using Field Sales/Wireless depends on the successful implementation of Sales Online and Sales Online's dependencies.

If you intend to use the features provided by Oracle Incentive Compensation and Oracle Fulfillment, you should make sure those are set up within the Sales Online implementation steps.

## **6.2 Setting Up Field Sales/Wireless**

### **Applies to: Field Sales/Wireless**

Follow these steps to set up a Field Sales/Wireless user:

### **Prerequisites**

The responsibility ID of "Sales Online Wireless User" must be created.

### **Steps**

Use this procedure to assign wireless responsibility to the application user. The profile options for the Oracle Field Sales/Wireless user are set up once per user.

1. Log in to the Oracle applications as System Administrator.
2. Navigate to **Profile > System**.
3. In the Profile field, enter JTFW% and click **Find**.
4. Enter the value 22726.

The value can be setup at the site level to enable all users or it can be set at a individual user level just to Wireless enabled select users.

The number 22726 is the responsibility ID of "Sales Online Wireless User". Make sure that you have the responsibility already set up.

## 6.3 Setting Up the Wireless Edition Server

### Applies to: Field Sales/Wireless

Follow these steps to set up the Wireless Edition Server:

### Prerequisites

For detailed instructions about installing the server, please refer to the *Oracle 9i Application Server Documentation, Release 1*.

### Steps

1. Install the 9iAS Wireless Edition Server.
2. Create a service that points to `jtfwlgnm.jsp` file in the application HTML top.

```
http://your.middle-tier.com:PORT/OA_HTML/jtfwlgnm.jsp
```

## 6.4 Creating Master Documents for Fulfillment (Optional)

### Applies to: Field Sales/Wireless

### Prerequisites

Fulfillment must be set up in Sales Online.

### Steps

To create a master document and associate it with a query, please refer to the following sections of the *Oracle CRM Foundation Concepts and Procedures guide, Administering Fulfillment* chapter. The sections you will need are outlined below, in the order you will need to perform them:

- Creating a Datasource File
- Downloading a Datasource File
- Uploading a Master Document
- Uploading a Master Document to the Marketing Encyclopedia System

Create master documents using seeded queries. The seeded query information is listed below:

- Query Identifier: 401
- Query Name: OSO Fulfillment Query

Please note, electronic delivery (via email) is the method of delivery that is supported for fulfillment.

# Part III

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## Post Implementation Tasks

This section contains the following chapter:

- [Chapter 7.1, "Implementation Verification Tasks"](#)



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# Verifying the Implementation

This topic group provides you with steps necessary to verify implementation of Oracle Sales Online and Oracle Field Sales/Wireless:

- [Section 7.1, "Implementation Verification Tasks" on page 7-1](#)
- [Section 7.2, "Performance Tuning" on page 7-2](#)

## 7.1 Implementation Verification Tasks

To verify that you properly implemented the applications perform the following tasks.

For information on the procedures necessary to perform these tasks, see the *Oracle Sales Online User Guide*.

1. Create an opportunity.
2. Use the Select a Customer field and enter the full or partial name of the organization or person that you want to find. By default the system will search for organizations.
3. Enter details for the opportunity.
4. Click **Create**.

If you can successfully create an opportunity, the basic functions of the product are working. Conditional dependency functionality is based upon the other modules that you are using. Please refer to [Section 2.4.1, "Mandatory Dependencies"](#) and [Section 2.4.2, "Conditional Dependencies"](#) for more information.

## 7.2 Performance Tuning

Customers should gather new statistics after the completion of an upgrade or installation and thereafter gather statistics monthly. However, objects with a high throughput and data volumes may require that statistics are gathered more frequently.

### 7.2.1 Gathering Statistics Concurrent Requests

Running these concurrent request will assist you with faster performance in Sales Products.

The following concurrent requests are available in Oracle Applications for gathering statistics:

- Analyze All Index Columns
- Backup Table Statistics
- Gather Schema Statistics
- Gather Table Statistics
- Restore Table Statistics

Please refer to the Oracle Application System Administration Guide for concurrent request parameters.

# Part IV

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## Appendixes

This section contains the following appendixes:

- [Appendix A, "System Profile Options"](#)
- [Appendix B, "Concurrent Programs"](#)
- [Appendix C, "Lookups"](#)



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## System Profile Options

This appendix provides a table of all of the system profile options used by the Oracle Sales Family of eBusiness Suite applications. Each system profile option in this table is also described in the implementation step where it is set. This table compiles all system profile options and arranges them in alphabetical order by name.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)
- OTS: (Oracle TeleSales)

### A.1 Setting System Profile Options

The procedure for setting up and changing system profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Use this procedure to set or change profile options.

### Steps

1. Choose **Oracle Sales Setup > System Profiles** under the Sales Administrator responsibility.  
The Find System Profile Values window appears.
2. Enter your search criteria in the Display region.
3. Click in the **Profile** Field. Enter a partial name of the profile using "%" as a wild card.
4. Click **Find**.  
The profiles are displayed in the System Profile Values window.
5. Set at least one of the following:
  - a. Set the Site value.  
This field displays the current value, if set, for all users at the installation site.
  - b. Set the Application value.  
This field displays the current value, if set, for all users working under responsibilities owned by the application identified in the Find Profile Values block.
  - c. Set the Responsibility value.  
This field displays the current value, if set, for all users working under the responsibility identified in the Find Profile Values block.
  - d. Set the User value.  
This field displays the current value, if set, for the application user identified in the Find Profile Values block.
6. Click in the field of the profile you want to set or change.
7. Select a value from the List of Values (LOV).
8. Click **Save** on the toolbar.

## A.2 Table of System Profile Options

The following table lists by name and in alphabetical order the system profiles used by the Oracle Sales Family of eBusiness Suite applications. The table includes the following columns from left to right:

- **Req. (Required):** "Y" in this column indicates the profile is required for the applications or functions.
- **New:** "Y" in this column indicates that the profile is new for this release.
- **Profile Name:** Name of the profile.
- **Product:** Lists the products which use the profile.
- **Functions:** Lists the functional areas affected by the profile.
- **Description:** Explains what the profile does.
- **Level:** Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.
- **Default:** Lists the seeded default for the profile, if any.

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		AMS: Should Call To Inventory Modules To Be Made	TeleSales	Events	Must be set to Yes for Oracle TeleSales.		
		AMS: Should Call to Pricing Modules to Be Made	TeleSales	Events	Must be set to Yes for Oracle TeleSales.		
		ASL: Conflict Flag	Field Sales/Laptop	Conflict resolution	If 'Y', it means client wins, if 'N', it means server wins.		
		ASL: Default MTL Organization ID for Field Sales/Laptop	Field Sales/Laptop				
		ASL: Enable Attachment	Field Sales/Laptop	Attachments	Must be set to Yes for Oracle Field Sales/Laptop attachments to work.		
		ASL: Enable Configurator	Field Sales/Laptop				
		ASL: Enable Encyclopedia	Field Sales/Laptop	Marketing Encyclopedia			
		ASL: Enable Selective Download	Field Sales/Laptop				
		ASO: Automatic Numbering	TeleSales				

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		ASO: Default Order Category	OSO TeleSales	Collateral, events	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.		Order Capture
		ASO: Default Order Type	TeleSales	Opportunities, collateral	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form launched from the Quote/Order tab.		
		ASO: Enable OSO Integration	OSO Quoting	Quotes	Enables OSO integration if set to Yes.		
		ASO: Product _ Organization ID					
	11.5.8	Client Timezone	TeleSales	Task	Sets the default time zone for tasks.		
		Default Login Function	Sales Online		Default login function		Null
		Default Status	TeleSales	Leads, opportunities	Default status for new tasks. Setting: all levels.		New
		FND: Message Level Threshold			Error or Success		
		HZ: Address Key Length		Lead import			15
	11.5.8	HZ: Change Party Name	TeleSales	Security	Determines if the customer name and Tax ID can be updated. Can be set at site, responsibility, and user level.		
		HZ: Duplicate Allowed					
		HZ: Execute API Callouts		TAP	If the value is set to "Yes", then changes made to customer records will be considered while TAP processing in New Mode. The value must be set to "Yes" for New Mode TAP to work.		No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		HZ: Generate Party Number	TeleSales Sales Online		Must be set to yes in Sales Online, except when loading history. If not set to Yes , you cannot manually create party numbers in Sales Online. You will receive the following error, "X Error Column Party Number must have a value".		
		HZ: Generate Party Site Number	TeleSales				
		HZ: Key Word Count	TeleSales	Lead import			5
		HZ: Postal Code Key Length	TeleSales	Lead import			5
		IBE: Use Pricelist Associated with Specialty Store	Sales Online	Quotes	Must be set to Yes for Quotes to work properly.		
Y	Y	IEU: Non-Media: Navigate	TeleSales	Universal Work Queue	Set to Yes to tell UWQ to reuse the same application window when you select a new work item. Set to No if you want UWQ to open a new additional window when you select a new work item. Set to Yes to save your computer resources. Can be set at the site, application, responsibility, and user levels.		No
		IEU: Queue: Leads	TeleSales	Universal Work Queue	Set to Yes to make this category available.		
		IEU: Queue: Marketing Lists	TeleSales	Universal Work Queue	Determines if a user can work on Non-Media Marketing Lists.		
		IEU: Queue: My Team Leads	TeleSales	Universal Work Queue	Set to Yes to make this category available.	ASRU	
		IEU: Queue: My Team Opportunities	TeleSales	Universal Work Queue	Set to Yes to make this category available.	ASRU	
		IEU: Queue: Quotes	TeleSales	Universal Work Queue	Set to Yes to make this category available.	ASRU	
		IEU: Queue Order: Marketing Lists	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.		

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		IEU: Queue Order: My Team Leads	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.	ASRU	
		IEU: Queue Order: My Team Opportunities	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.	ASRU	
		IEU: Queue Order: Quotes	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.	ASRU	
		JTF Home Page File Name	Sales Online		Value is JSP name to use as homepage.		Null
		JTF: Default Currency	TeleSales	Leads, opportunities	Default currency for transactions. Setting: all levels		USD
		JTM: Debug Mode	Field Sales Laptop		Debug Mode On/Off for CRM Mobile Applications		
		JTM: Default Logon Responsibility for CRM Mobile Application	Field Sales Laptop		Default Logon Responsibility for CRM Mobile Application Logon		
		JTM: Post Installation Tasks Java Class Full Name for CRM Mobile Application	Field Sales Laptop		Post Installation Tasks Java Class Full Name for CRM Mobile Application		
		JTM: TimePicker Format (HH24/HH12)	Field Sales Laptop		Specifies format for Timepicker (HH24/HH12) for Oracle CRM Mobile Applications HH24 format e.g., Date + 23:50 HH12 format e.g., Date + 11:50 pm		
		MO: Operating Unit	Sales Online jTeleSales	Quotes			
		OS: Address Required for Opportunity	Sales Online TeleSales	Opportunity	Address required for Opportunity		No
		OS: Address Required for Organization	Sales Online TeleSales	Customer	Address required for Organization		No
		OS: Address Required for Person	Sales Online TeleSales	Customer	Address required for Person		No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Address Required for Sales Lead	Sales Online TeleSales	Leads	Address required for Sales Lead		No
		OS: Allow Opportunity Forecast by Product Category	Sales Online	Forecasting	If set to Yes, opportunities will display on the worksheet with the product categories that make up the opportunity by default. If set to No, the opportunity worksheet will not show the product category levels of the opportunity.		
		OS: Allow Updating Frozen Opportunities	TeleSales Sales Online	Opportunities	Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze check box selected.  This profile can be set at either the responsibility or the user level.  When set to <i>Y</i> , this profile option allows the user or responsibility to make changes. An <i>N</i> setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze check box is selected. This includes the Freeze check box itself.		Yes
		OS: Always Add Creator to Customer Sales Team	Sales Online	Sales Team	If set to Yes, then the user who creates the customer is always added to the customer sales team, even if the profile OS: Customer Access is set to Full. Otherwise, the creator is added to the customer sales team only if the profile OS: Customer Access is not set to Full.		No

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Assign New Lead	TeleSales Sales Online	Lead	<p>if this profile is set to No, then the application uses the Territory Manager to automatically assign the resources to the lead. The first person the Territory Manager assigns becomes the owner. The rest of the resources in the territory become sales team members on the lead.</p> <p>if this profile is set to Yes, then the agent must enter the owner manually using the Owner drop-down list. If the agent does not make an entry, then the lead is assigned to the default user set in OS: Default Resource ID. If no default resource is set, then application assigns ownership to the user creating or updating the lead.</p>		No
		OS: Auto Assigning from Lead Import	Sales Online TeleSales	Lead			Yes
		OS: Auto Qualify Lead	TeleSales Sales Online	Lead	<p>Turns automatic qualification for sales leads on or off. A setting of Yes, causes the application to attempt to qualify a lead each time the lead is updated.</p> <p>A setting of No means the user must qualify the lead manually by selecting the Qualified check box.</p> <p>If this profile is not set, it is defaulted to 'N'</p>		Yes
		OS: Auto Ranking from Lead Import	Sales Online	Lead			Yes
n/a	n/a	(obsolete) OS: Auto-relate Lead note to Customer	Sales Online TeleSales		Relate a newly created lead note to it's party automatically. AS_NOTES_LEAD_CUSTOMER		Yes
n/a	n/a	(obsolete) OS: Auto-relate Lead note to Primary Contact	Sales Online TeleSales		Relate a newly created lead note to it's primary contact automatically. AS_NOTES_LEAD_CONTACT		No
		OS: Auto-relate Opportunity note to Customer	Sales Online		Relate a newly created opportunity note to it's party automatically. AS_NOTES_OPP_CUSTOMER		Yes

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Auto-relate Opportunity note to Primary Contact	Sales Online TeleSales		Relate a newly created opportunity note to it's primary contact automatically. AS_NOTES_OPP_CONTACT		No
		OS: Auto-relate Relationship note to Object	Sales Online TeleSales		Relate a newly created relationship note to it's object automatically. AS_NOTES_REL_OBJECT		Yes
		OS: Auto-relate Relationship note to Subject	Sales Online		Relate a newly created relationship note to it's subject automatically. AS_NOTES_REL_SUBJECT		Yes
		OS: Budget status required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a budget status for a lead before that lead can be qualified.		Yes
		OS: Calendar Setting Required for Assignment	Sales Online		Calendar setting required for sales lead assignment.		No
		OS: Campaign code required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a campaign code for a lead before that lead can be qualified.		Yes
Yes		OS: Compensation Sales Credit Type	TeleSales Sales Online	Opportunities	Compensation sales credit type.		
		OS: Competitor Required for Opportunity	TeleSales	Opportunity Center	If set to Yes, the Key Competitor is a required field for an opportunity. If set to No, the Key Competitor is not a required field. Option can be set at the site level only.		No
		OS: Contact phone required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a phone number for a lead contact before that lead can be qualified.		Yes
		OS: Contact role required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a role for a lead contact before that lead can be qualified.		Yes
		OS: Create a list with filter conditions					
		OS: Create Contact Privilege	TeleSales	Security	If set to Yes, the user, site, or responsibility can create a contact. If set to No, the user, site, or responsibility cannot create a contact.		Yes at site level

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Create Organization Privilege	TeleSales	Security	If set to Yes, the user, site, or responsibility can create an organization. If set to No, the user, site, or responsibility cannot create an organization.		Yes at site level
		OS: Create Person Privilege	TeleSales	Security	If set to Yes, the user, site, or responsibility can create a person. If set to No, the user, site, or responsibility cannot create a person.		Yes at site level
		OS: Create Tasks Flag	Sales Online		Flag to indicate if tasks need to be created automatically.		Yes
		OS: Customer Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons, lookups	<b>Full:</b> The user can view and update all customers. Generally, this access is given to super users only. <b>Prospecting:</b> Users can view all customers but can update customer information only if they are on the sales team. <b>Sales Team:</b> Users can view and modify customer information when they are on the sales team.		Full
		OS: Customer Sales Team Default Role Type	TeleSales Sales Online	Organizations, Persons	Assigns a role type to a new sales team member if no role is specified by the user.		Account Manager
		OS: Daily Conversion Type	TeleSales Sales Online	Opportunities	Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types.		Corporate
		OS: Date Mapping Type	Sales Online		Date mapping type		S
		OS: Dead Lead Status	Sales Online TeleSales	Leads	Dead lead status		DEAD_LEAD
		OS: Decision Time Frame Required	TeleSales Sales Online		Decision time frame required		Yes
		OS: Default Address Style	Sales Online		Default address style		AS_DEFAULT

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Default Budget Status for Leads	Sales Online TeleSales	Leads	Default budget status for leads		Pending
		OS: Default Channel for Leads	Sales Online TeleSales	Leads	Default channel for leads		Direct
		OS: Default Close Date Days	TeleSales Sales Online	Opportunities	Sets the default close date for an opportunity. The automatic close date is the creation date plus the number of days set in this profile.		150
		OS: Default Decision Time Frame for Leads	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a time frame for a lead before that lead can be qualified.		Within a week
		OS: Default Lead Contact Role	Sales Online TeleSales	Leads	Default Lead Contact Role		END_USER
		OS: Default Lead Scorecard	TeleSales Sales Online	Leads	Default Lead Scorecard		
Yes		OS: Default Opportunity Sales Stage	TeleSales Sales Online	Opportunities	Default Sales Stage for new opportunity		Stage 1
		OS: Default Opportunity Status	TeleSales Sales Online	Opportunities	Default Opportunity Status for opportunity		Preliminary
Yes		OS: Default Opportunity Win Probability	TeleSales Sales Online	Opportunities	The default win probability for new opportunities.		10-Prospecting (qualified)
		OS: Default Period Type	TeleSales Sales Online				
Yes		OS: Default Period Type for Currency Conversion	TeleSales Sales Online		Default period type for currency conversion		
		OS: Default Resource ID Used for Sales Lead Assignment	TeleSales Sales Online	Leads	Sets up default resource to receive any imported leads not assigned by the territory management module.		

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Default Sales Channel	TeleSales Sales Online	Opportunities	Default sales channel for new opportunities		Direct
		OS: Default Status for Leads	Sales Online TeleSales	Leads	Default Status for Lead		New
		OS: Default Vehicle Response Code for Leads	Sales Online TeleSales	Leads	Default Vehicle Response Code for Leads		User
		OS: Default Vehicle Response Code for Opportunity	Sales Online TeleSales	Opportunities	Default Vehicle Response Code for Opportunity		User
		OS: Default Win/Loss Status	Sales Online		Default Win/Loss Status		None
		OS: Defaulting Primary Customer Address to Opportunity	Sales Online	Opportunities	Defaulting primary customer address to opportunity.		No
		OS: Degree of Parallelism	Sales Online		Degree of Parallelism for concurrent program		4
Y	Y	OS: Disable Batch Mode Lead Assignment		Leads	If the value of this profile option is "Yes" then TAP concurrent program (Assign Territory Accesses Program) will not assign resources to leads. If the value is "No", then the program will assign resources to leads.		Yes
		OS: Display Purchase Line Sub Total	Sales Online		If set to Yes, will display subtotal by interest type.		No
		OS: Display Purchase Line Sub Total	Sales Online	Opportunities	If set to Yes, will display the purchase line sub total. Can be set at the site or user level.		No
		OS: Enable Customer LOV Security	Sales Online TeleSales		Setting this profile to 'Yes' restricts users to creating opportunities and leads only for those customers which they can view.  Setting this profile to 'No' allows all users to create opportunities and sales leads for any customers. The users can update the opportunities and sales leads they have created.		No
		OS: Enable Real Time Denormalization for Customer Classification	Sale Online	Classifications	If set to Yes, enables real time denormalization of data entered or updated into the as_hz_class_code_denorm table.		Yes

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Enable Real Time Opportunity and Customer Assignment	Sales Online TeleSales		Enables assignment of customers, leads, and opportunities in real time, whenever an agent updates a record. This is required for online territory assignment.		No
		OS: Enable Tracking Opportunity History Data			Set at the site level. If set to Yes, will enable the history tracking for opportunities. If set to No (the default), will not track history for opportunity. The following items are included in the tracking: customer address, status, sales channel, sales stage, win probability, close date, total amount, and currency.		No
		OS: Execute TCA API Callouts for Mobile Sales	Sales Online		Execute TCA API Callouts for mobile sales		No
Yes		OS: Forecast Calendar	TeleSales Sales Online	Forecasting	The name of the calendar you are using to manage your forecasts.		
Yes		OS: Forecast Sales Credit Type	TeleSales Sales Online	Forecasting			
		OS: Generate Opportunity System Notes	TeleSales Sales Online	Opportunities	Determines whether or not notes are automatically generated whenever the opportunity is modified by a user.		Yes
No	Yes	OS: Hash Area Size for TAP	Sales Online	TAP	If the value is set, TAP will set the value of the database parameter hash_area_size with this value. Consult your DBA to set this value.  Note: The value should be an integer value. The value set here is limited to the TAP program, i.e., the database setting for the rest of the application is not changed by this setting.		No
		OS: Interest Type Master Org_ID	Sales Online		Master org ID required for MO interest type migration script		
		OS: Inventory Category Integration	TeleSales Sales Online	Opportunities	When set to Yes, this system profile uses product categories from inventory for the interest types.		Yes
		OS: Language	TeleSales				

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Lead Link Status	Sales Online TeleSales	Leads	Lead Link Status		CONVERTED_TO_OPPORTUNITY
		OS: Lead Routing Status	Sales Online TeleSales	Leads	Lead Status after Routing		New (seeded value)
Yes	Yes	OS: Linking Opportunity to Lead	TeleSales	Opportunities	<p>There are three settings for this profile:</p> <p>Allow with prompt-If selected, allows the user to create a link to a lead either through the "Create Opportunity" function or through the Leads link on the Opportunity detail page.</p> <p>Allowed-If selected, allows the user to create a link to a lead through the Leads link on the Opportunity detail page.</p> <p>Not allowed-If selected, does not allow users to create links to leads.</p>		Prompted
		OS: Manager Update Access	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	<p>This profile option sets the level of access for sales team members with the role of TeleSales Manager to update information for their subordinates in the sales organization.</p> <p>This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege.</p> <p>This profile has three possible settings</p> <p><b>Update data:</b> Update.</p> <p><b>Inherit data:</b> Inherit access privilege from subordinate.</p> <p><b>View data:</b> View data only.</p>		R
		OS: Maximum Roll Days for Converting Amount	TeleSales Sales Online	Opportunities	Maximum roll days for converting currency amounts if no daily conversion rate exists.		
		OS: Move Opportunities	Sales Online	Opportunities	Move Opportunities		Open

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Move Sales Leads	Sales Online	Leads	Move Sales Leads		
		OS: Opportunity Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	<p><b>Global Full:</b> Users can view and update all opportunities whether they are on the sales team or not. Generally, this access is given to super users only.</p> <p><b>Org Full (Full by Organization):</b> Users can view and update all opportunities whether or not they are on the sales team. However, they are restricted to viewing and updating data for the HR organization they are assigned to in Oracle HRMS.</p> <p><b>Prospecting:</b> Users can view all opportunities but they can make changes only when they are on the sales team. Users can create opportunities for a customer only when they are on that opportunity's sales team.</p> <p><b>Sales Team:</b> Users can view opportunities only when they are on the sales team. When the opportunity creator selects the Full Access check box on the Sales Team tab for a team member, that team member can update the opportunity. Otherwise the record is view only.</p>		Global Full
		OS: Opportunity Probability Link	TeleSales Sales Online	Opportunities	Determines whether a warning or error is given if the win probability amount does not fall within the sales stages probabilities.		Warning
		OS: Opportunity Rollup Override Flag	Sales Online TeleSales	Opportunities	Determines whether the Not Null Opportunity header fields will be updated during rollup.		Yes
		OS: Opportunity Sales Credit Enforce Sales Team Definition	TeleSales Sales Online	Opportunities	If set to Yes, only people on the sales team are allowed to receive sales credit. A sales rep cannot be removed from a sales team if the sales rep has sales credit on the opportunity.		Yes
		OS: Opportunity Sales Team Default Role Type	Sales Online	Opportunity Sales Teams	Opportunity Sales Team Default Role Type		

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
N	Y	OS: Organization Original System Reference URL	TeleSales	eBusiness Center: Organization tab	Enter the URL for your legacy system that contains organization records. The External Reference Number in the eBusiness Center opens the record in the legacy system using a browser.		
N	Y	OS: Person Original System Reference URL	TeleSales	eBusiness Center: Person tab	Enter the URL for your legacy system that contains people records. The External Reference Number in the eBusiness Center opens the record in the legacy system using a browser.		
		OS: Preferred Reporting Currency	TeleSales Sales Online	Opportunities	Preferred currency for denorm programs.		US Dollar
		OS: Privilege to Change Lead Owner	Sales Online TeleSales	Lead	User having this privilege can change the owner of a lead to which he/she has update access. User who does not have this privilege can change owner of only those leads that they own.		No
		OS: Privilege to Change Opportunity Owner	Sales Online	Opportunities	Privilege to change the opportunity owner.		No
		OS: Project name required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a project name for a lead before that lead can be qualified.		Yes
		OS: Rank Lead	Sales Online TeleSales	Leads	Rank lead		System
N	Y	OS: Relationship Original System Reference URL	TeleSales	eBusiness Center: Relationship tab	Enter the URL for your legacy system that contains relationship records. The External Reference Number in the eBusiness Center opens the record in the legacy system using a browser.		

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Sales Admin Update Access	TeleSales Sales Online	eBusiness Center, organizati ons, persons, lookup	An employee with the TeleSales Administrator role (as defined in the Resource Manager) can access the same records as the manager of the group they are assigned to. Groups are also set up in Resource Manager. The access can be of three types:  <b>Update data:</b> The administrator can update the same data as the manager of the group.  <b>Inherit data:</b> Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates.  <b>View Data:</b> Administrators can only view the data created by the manager's subordinates.		R
		OS: Sales channel required	TeleSales Sales Online	Lead managemen t	A setting of Y requires users to enter a sales channel for a lead before that lead can be qualified.		Y
		OS: Sales Lead Access Privilege	TeleSales Sales Online	eBusiness Center, organizati ons, persons	Controls the level of access to leads. The available settings are:  <b>Full:</b> Employees can view and modify all leads, even those not assigned to them.  <b>Sales Team:</b> Only the employee who has been assigned the lead can view and modify it.  <b>Prospecting:</b> Employees can view all leads but cannot update any.		Full
		OS: Sales Lead Aging Abandon-Action	Sales Online TeleSales	Leads	Sales Lead Aging Abandon-Action		Abandon
		OS: Sales Lead Aging Days to Abandon	Sales Online TeleSales	Leads	Sales Lead Aging Days to Abandon		1
		OS: Sales Lead Aging No Action	Sales Online TeleSales	Leads	Sales Lead Aging No Action		1

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Sales Lead Aging No Action-Action	Sales Online TeleSales	Leads	Sales Lead Aging No Action-Action		Abandon
		OS: Sales Methodology	TeleSales Sales Online	Opportunities	Sales methodology		1
		OS: Sales Team Creator Keep Flag	TeleSales Sales Online	Opportunities	Default keep flag for sales team creator.		Yes
No	Yes	OS: Sort Area Size for TAP	Sales Online	TAP	If the value is set, TAP will set the value of the database parameter <code>sort_area_size</code> with this value. Consult your DBA to set this value.  Note: The value should be an integer value. The value set here is limited to the TAP program, i.e., the database setting for the rest of the application is not changed by this setting. Also, if the value of this profile is not set, then TAP will not alter the database settings.		No
		OS: Source Code Mandatory for Leads	Sales Online TeleSales	Lead	Source Code mandatory for leads		No
		OS: Source Code Required for Opportunity	Sales Online	Opportunities	Source Code Required for Opportunity		No
n/a	n/a	(obsolete) OS: Territory Minimum Number of Records for Parallel Processing	Sales Online TeleSales	TAP	If the number of records to process (in <code>AS_CHANGED_ACCOUNTS</code> table) are less than the profile option value then no parallel processes of ASTGAR (Generate Access Records) will be spawned regardless of value of profile option OS: Territory Number of Child Processes		100
n/a	n/a	(obsolete) OS: Territory Number of Child Processes	Sales Online TeleSales	TAP	Number of parallel processes of ASTGAR (Generate Access Records) spawned by the ASTATA (Assign Territory Accesses Program). The values should be set based on available processors and load on the system. Consult with your System Administrator for setting this number		1

Req.	New	Profile Name	Product	Functions	Description	Level	Default
n/a	n/a	(obsolete) OS: Territory Records to Open for Processing Changed Accounts	Sales Online TeleSales	TAP	ASTGAR (Generate Access Records) program will process this number of records (in AS_CHANGED_ACCOUNTS table) at a time. Consult with your DBA for setting this number.		10000
		OS: Total budget amount required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter the total budget amount for a lead before that lead can be qualified.		Yes
		OS: Use Forecast Materialized View	Sales Online	Forecasting	Determines whether or not to use materialized views to get pipeline data for forecast.		No
		OS: View Competitor Party Detail	Sales Online		View Competitor Party Detail		Yes
		OS: View Partner Party Detail	Sales Online		View Partner Party Detail		Yes
		OSO Disable Profile Cookie	Sales Online		Within Sales Online profiles are cached. If set to ON, profiles will not be cached in the cookie. It is recommended that this profile remain turned OFF, however, if a customer wants to reduce cookie size you can turn the profile ON with the understanding the the performance of the application may be impacted.		OFF
		OSO: Application Utility Class	Sales Online		Class name of AppUtility Class (e.g., oracle.apps.asf.util.OsoAppUtility)		
		OSO: Create a list with filter conditions					
		OSO: Debug Messages On	Sales Online		Setting to display or hide debugging messages.		No
		OSO: Default Account Site Use	Sales Online		Default Account Site Use		BILL_TO
		OSO: Default Address Lines	Sales Online		Default Address Lines		2
		OSO: Default Address Type	Sales Online		Default Address Type		MARKET
		OSO: Default Country	Sales Online		Default Country		US
		OSO: Default Customer Category	Sales Online		Default Customer Category		CUSTOMER

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Default for Show Quick Task	Sales Online		Default for Show Quick Task		No
	Yes	OSO: Default Forecast Category	Sales Online	Forecasting	Setting to determine the default forecast category used when forecasting.		1
		OSO: Default Forecast Currency	Sales Online	Forecasting	Setting to determine the default forecast currency used for forecasting.		USD
		OSO: Default Forecast Period Type	Sales Online	Forecasting	The Default Forecast Period Type		
		OSO: Default Forecast Worksheet Lines	Sales Online	Forecasting	Setting to determine what values should be used for defaults in the forecast worksheets, zero or pipeline.		Pipeline
		OSO: Default home page msg ID	Sales Online	home page	File ID for home page message		
		OSO: Default Lead Contact Role Type	Sales Online	Leads	The Default Lead Contact Role Type		END_USER
		OSO: Default Lead Contact Title	Sales Online	Leads	The Default Lead Contact Title		MS
		OSO: Default Link Type	Sales Online		The Default Link Type		URL
		OSO: Default Number of Days to Filter Interactions	Sales Online		The Default Number of Days to Filter Interactions		180
		OSO: Default Organization Phone Type	Sales Online		The Default Organization Phone Type		GEN
		OSO: Default Organization Relationship	Sales Online		Sales Online default Organization relationship		EMPLOYER_OF
		OSO: Default Person Phone Type	Sales Online		The Default Person Phone Type		GEN
		OSO: Default Person Relationship	Sales Online		The Default Person Relationship		EMPLOYEE_OF
		OSO: Default Preferred Language	Sales Online		The Default Preferred Language		US
		OSO: Default Sales Compensation Period Type	Sales Online		The Default Sales Compensation Period Type		
		OSO: Default Sales Credit Type			Sets the default sales credit type for forecasting.		

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Default Sales Group and Role	Sales Online		The Default Sales Group and Role		
		OSO: Default Value for End of Day	Sales Online		The Default Value for End of Day		17
		OSO: Default Value for Start of Day	Sales Online		The Default Value for Start of Day		9
		OSO: Default Weekday to Begin With	Sales Online		The Default Weekday to Begin With		2
		OSO: Default Weekday to End With	Sales Online		The Default Weekday to End With		6
		OSO: Define Column On	Sales Online		To turn on/off the column define feature.		Null
		OSO: Disable Page Level Security	Sales Online		If set to yes, Disables Page Level Security.		No
		OSO: Disable Profile Cookie	Sales Online		This application caches profile values in the cookie. Turning this profile on will prevent profile values from being cached in the cookie. We recommend that this profile be kept OFF, but if you want to reduce cookie sizes then you can turn this ON. The application performance may be impacted.		Off
		OSO: Display Bubble Train	Sales Online		Display Bubble Train is the profile which controls the display of the progression of the stages when you choose a sales methodology. It is same as the checkbox on the Opportunity preferences page which is Display Sales Methodology Progression.		Yes
		OSO: Display Opportunity Competitors in Detail	Sales Online		Display Opportunity Competitors in Detail		No
		OSO: Display Opportunity Worksheet Grand Totals	Sales Online	Forecasting	Setting to determine whether grand totals should be displayed for the opportunity worksheet		No
		OSO: Display Purchase Line Sub Total	Sales Online	Opportunity	If set to "Yes", a table with subtotals of amounts by interest type is displayed below the purchase items table on the opportunity details page.		No

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Display Subordinate Current Pipeline	Sales Online	Forecasting	Setting to determine whether subordinate current pipeline should be displayed.		Yes
		OSO: Display Tracking Information	Sales Online	Controls indicators	Flag to display tracking information. Works in conjunction with OSO: Record View Tracking Max Period and OSO: Record View Tracking Period to control the star (new record) and circle (updated by another user) indicators on summary pages.		Yes
n/a	n/a	OSO: Enable Lead Share (obsolete)	Sales Online		Enable lead share		No
		OSO: Enable Product Category in Opportunity Advanced Search	Sales Online		Enable product category in opportunity advanced search		No
		OSO: Enable Quotes	Sales Online	Quotes	Enables the quoting function between Oracle Quoting and Oracle Sales Online.		No
		OSO: Enable Record Count in Tables	Sales Online		Enables record count in tables		No
		OSO: Forecast Autosubmit Worksheets	Sales Online	Forecasting	Setting to determine which worksheets are automatically submitted with submitting a forecast.		None
		OSO: Forecast Calendar Month	Sales Online	Forecasting	Setting to determine the number of calendar months you can move forward or backwards when viewing.		6
		OSO: Forecast Max Generate Months	Sales Online	Forecasting	Maximum number of months generated when generating multiple forecasts.		6
		OSO: Generate Home Page Bins in Sequence	Sales Online	Home Page	Profile to control sequential or parallel generation of content for home page bins.		Y
		OSO: Home Page Timeout	Sales Online	home page	Time used to retrieve bin data on home page.		5000
n/a	n/a	OSO: Lead Share Application ID (obsolete)	Sales Online	Leads	Lead Share Application ID		n/a
n/a	n/a	OSO: Lead Share Company Code (obsolete)	Sales Online	Leads	Lead Share Company Code		n/a
n/a	n/a	OSO: Lead Share Default Org Text (obsolete)	Sales Online	Leads	Lead Share Default Org Text		n/a

Req.	New	Profile Name	Product	Functions	Description	Level	Default
n/a	n/a	OSO: Lead Share Host Name (obsolete)	Sales Online	Leads	Lead Share Host Name		n/a
n/a	n/a	OSO: Lead Share LETS Server (obsolete)	Sales Online	Leads	Lead Share LETS Server		n/a
n/a	n/a	OSO: Lead Share Partner ID (obsolete)	Sales Online	Leads	Lead Share Partner ID		n/a
n/a	n/a	OSO: Lead Share Port Number (obsolete)	Sales Online	Leads	Lead Share Port Number		n/a
n/a	n/a	OSO: Lead Share Proxy Host (obsolete)	Sales Online	Leads	Lead Share Proxy Host		n/a
n/a	n/a	OSO: Lead Share Proxy Port (obsolete)	Sales Online	Leads	Lead Share Proxy Port		n/a
n/a	n/a	OSO: Lead Share Responsibility ID (obsolete)	Sales Online	Leads	Lead Share Resp ID		n/a
n/a	n/a	OSO: Lead Share Salesforce ID (obsolete)	Sales Online	Leads	Lead Share Salesforce ID		n/a
n/a	n/a	OSO: Lead Share User ID (obsolete)	Sales Online	Leads	Lead Share User ID		n/a
	Yes	OSO: List Creation Default Public Flag	Sales Online	Contact lists	If a list is created, it will be public by default on the List Creation page.		N
	Yes	OSO: List Entries Show Primary Address Only	Sales Online	Contact lists	If set to Y, only the primary address of the contact is shown in list entry tables.		N
	Yes	OSO: List Purge Minimum Number of Days	Sales Online	Contact lists	Minimum age of list in days before its entries can be purged.		10
	Yes	OSO: List Query Default Address Status	Sales Online	Contact lists	Default address status radio button value in Address Filter page. The default value will be ignored if no Country is picked on that page.		A (A/I/B)
	Yes	OSO: List Query Default Contact Status	Sales Online	Contact lists	Default contact status radio button value in Contact General Filter page.		A (A/I/B)
	Yes	OSO: List Query Default Relationship Type	Sales Online	Contact lists	Whether by default contacts for organizations or for persons are to be queried.		ORG (ORG/PER)
		OSO: Max Attachment Size	Sales Online		Maximum allowable attachment size in bytes.		100000
		OSO: Max Chart Legends	Sales Online		Maximum number of legends in a chart.		20

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Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Max Legend Label Length	Sales Online		Maximum number of characters in chart legend labels.		22
		OSO: Maximum Roll Days for Converting Amount	Sales Online				
		OSO: Min Rows Top Navigate	Sales Online		Minimum number of rows on a table that will enable top and bottom navigate links.		20
		OSO: Minimum Search String Length	Sales Online		Minimum number of characters required for any search from a text field.		4
		OSO: Number of News Headlines	Sales Online		Number of news headlines		5
		OSO: Number of Rows for Fetch	Sales Online		Number of rows to be fetched. For internal use only.		1000
		OSO: Opportunity Detail Security Check	Sales Online		Opportunity detail security check		Yes
		OSO: Opportunity Variance Bin Reports Aging Days	Sales Online		Aging days value to be used in Opportunity Variance Aging Opportunities Bin report.		365
		OSO: Opportunity Variance Bin Reports Amount	Sales Online		Amount to be used in Opportunity Variance Aging Opportunities Bin Report.		100000
		OSO: Opportunity Variance Bin Reports Number of Days	Sales Online		Number of days to be used in Opportunity Variance Bin Reports as Time Range in Queries		7
		OSO: Opportunity Variance Bin Reports Win Probability	Sales Online		Win Probability values to be used in Opportunity Variance Bin Reports as query criteria.		20
Y		OSO: Opportunity Worksheet Threshold Amount			Determines the threshold amount under which opportunities will be rolled up into a single line item. To turn this feature off, leave the profile blank for all available accesses; site, user, and responsibility.		1,000
		OSO: Oracle Internal	Sales Online		For Oracle internal implementations only. We have built certain features which are for Oracle internal business only. They are turned on when you set the Oracle Internal profile to Yes. This should not be used by any external customers.		No
		OSO: Organization Detail Security Check	Sales Online		Organization Detail Security Check		Yes

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Original System Reference URL	Sales Online				URL
		OSO: Performance Warning	Sales Online		Performance Warning		
		OSO: Person Detail Security Check	Sales Online		Person Detail Security Check		
		OSO: Person Original System Reference URL	Sales Online		Person Original System Reference URL		
No		OSO: Projects Integrated	Sales Online	360 degree view Projects	Whether Projects application is installed and should be integrated with Sales Online. If set to "No", when user tries to view projects, sees a "Coming Soon" message. If set to "Yes", and Oracle Projects is installed, user can view projects.		No
		OSO: Quick Find On	Sales Online		Profile to render Quick Search		
		OSO: Quick Find Security Check	Sales Online		Quick Find Security Check		
		OSO: Record View Tracking Max Period	Sales Online	Controls indicators	Works in conjunction with OSO: Display Tracking Information and OSO: Record View Tracking Period to control the star (new record) and circle (updated by another user) indicators on summary pages.		14
		OSO: Record View Tracking Period	Sales Online	Controls indicators	Record view tracking period must be a value less than ASF_RECORD_VIEW_PERIOD. Works in conjunction with OSO: Record View Tracking Max Period and OSO: Display Tracking Information to control the star (new record) and circle (updated by another user) indicators on summary pages.		14
		OSO: Relationship Original System Reference URL	Sales Online		Relationship Original System Reference URL		
		OSO: Resultset Cache On	Sales Online		This should be turned off if translated values are not seen in tables.		No
		OSO: Search Lead Wildcard	Sales Online		Can % be the first character in search sent to list of values.		No
		OSO: SQL Trace On	Sales Online		If set to "Yes" turns the SQL trace on.		No

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Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Subordinate Current Pipeline	Sales Online		Display subordinate current pipeline		Yes
		OSO: Use Product Category LOV	Sales Online	Opportunity	Determines if a list of values or drop down menu will be used to select a product category on the opportunity detail page. If set to Yes, application will use a list of values. If set to No, application will use a drop down list. Using a list of values may have a positive impact on the speed of the application.		No
		OSO: Use Product Category LOV	Sales Online	Opportunity	If set to "Yes" the product category on the opportunity purchase items table (in opportunity create and detail pages) is displayed as a list of values (LOV) with a Go button, instead of a drop down list.		No
		OSO: Wireless User Device	Sales Online Wireless		Wireless device used by the user		PHONE
		OTS: ANI with No Area Code	TeleSales		Used to match the Telephony Caller ID with Customer Telephone Number		
		OTS: Associate Relationship Location To Organization	TeleSales	Addresses	A setting of Yes, causes any address you enter for a contact at an organization (party of type party relationship) automatically to become an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. A setting of No turns this feature off.	ASRU	Yes
		OTS: Contact Role	TeleSales	Organizations, Persons	Sets the default contact role for an organizational contact.	ASR	Contact
		OTS: Customer - Display Inactive Records For Party List Of Values	TeleSales		Set to Yes to see inactive records in the party lists of values	ASRU	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.8	OTS: Customer-Include Address Style In Concatenated Format	TeleSales	Global Address in eBusiness Center header and Address tab	Set to Yes to have the address style name (example US) at the beginning of the address field before the concatenated address. Profile can be set at the site, application, and responsibility levels.	ASRU	
		OTS: Default Collateral Reply to Email Address	TeleSales	Event confirmation letter	Enter the email address you want collateral recipients to use when replying with collateral confirmation emails. Required for electronic collateral to work.	ASRU	
		OTS: Default Collateral Subject Line	TeleSales	Collateral	Enter the subject line you want collateral recipients to use when replying with collateral confirmation emails. Required for electronic collateral to work.	ASRU	
		OTS: Default Country	TeleSales	Organizations, Persons	Sets the default country used for address creation.	ASRU	US
	new	OTS: Default Cover Letter for Collateral Requests	TeleSales	Collateral	Used to populate the cover letter item once a collateral is selected from the list of values.	ASRU	
		OTS: Default Event Reply to Email Address	TeleSales	Event confirmation letter	Enter the email address you want event enrollees to use for replying to enrollment confirmation emails.	ASRU	
		OTS: Default Event Subject Line	TeleSales	Event confirmation letter	Enter the subject line for the enrollment confirmation email.	ASRU	
		OTS: Default Note Type	TeleSales		Default type for a new note	ASRU	AS_USER
		OTS: Default Party Type	TeleSales	Organizations, Persons	Sets the default party type for the eBusiness Center header. Available values are: Person Organization Party Relationship	ASRU	PARTY - RELATIONSHIP
		OTS: Default Person Title	TeleSales	Organizations, Persons	Sets the default title for a person in the eBusiness Center header.	ASRU	
		OTS: Default Phone Line Type	TeleSales	Organizations, Persons	The default phone type for the eBusiness Center header.	ASRU	GEN

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Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Default Relationship	TeleSales	Organizations, Persons	The default relationship between parties.	ASRU	CONTACT_OF
		OTS: Default Sales Group	TeleSales	Selection of group	Entering a default sales group in this profile means that the user no longer has to choose a group each time they launch the eBusiness Center. You need not set a default for a user that has only one role and group.		
		OTS: Default Shipping Method for Electronic Collateral	TeleSales	Collateral	Defines the shipping method for electronic collateral.	ASR	EMAIL
		OTS: Default Shipping Method for Physical Collateral	TeleSales	Collateral	Defines the default shipping method for physical collateral.	ASR	
		OTS: Default Site Usage	TeleSales	Organizations, Persons	The default type for the address in the eBusiness Center header. For example: Bill to, Ship to.	ASRU	
		OTS: Default Tab in eBusiness Center	TeleSales	eBusiness Center	Determines which tab is active when the user launches the Oracle TeleSales eBusiness Center	ASRU	AST_EBC_INT
		OTS: Default Tab in Opportunity Center	TeleSales		Determines which tab is active when the user launches the Opportunity Center	ASRU	AST_OPC_PRI
		OTS: Default Tab in Sales Lead Center	TeleSales	eBusiness Center	Determines which tab is active when the user launches the Oracle TeleSales Lead Center	ASRU	AST_SLC_PUR
	11.5.8	OTS: Default Task Date Type	TeleSales	eBusiness Center Task Tab	Sets the default date type in the Task tab. Profile can be set at all levels.	ASRU	
		OTS: Default Universal Search Tab	TeleSales		Default Universal Search Tab	ASRU	Quick Search
		OTS: Default Universal Search Type	TeleSales		Default Universal Search Type	ASRU	Organization
		OTS: Default User Role	TeleSales	Selection of role	Entering a default user role in this profile means that the user no longer has to choose a role each time they launch the eBusiness Center. You need not set a default for a user that has only one role and group.	ASRU	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.8	OTS: Default User Sales Group	TeleSales	Selection of Sales Group	Entering a default user sales group in this profile means that the user no longer has to choose a group each time they launch the eBusiness Center. You need not set a default for a user that has only one role and group	ASRU	
		OTS: Display Customer Profile	TeleSales	eBusiness Center	A setting of <i>Yes</i> enables the customer profile area of the eBusiness Center. A setting of <i>No</i> means the fields are disabled.	ASRU	No
	Yes	OTS: Display In-Active Records For Party LOV	TeleSales	eBusiness Center	Set to <i>Yes</i> to display inactive as well as active customers in the Organization, First Name, and Last Name LOVs. Set to <i>No</i> to display only active records.		No
		OTS: Dump UWQ Params	TeleSales		Setting this profile will dump the parameters from UWQ to TeleSales into the log file.	ASRU	Yes
		OTS: Enable Address Validation	TeleSales	Organizations, Persons	A setting of <i>Yes</i> turns on address validation.	AS	No
		OTS: Enable Customer Standard Navigation	TeleSales		To enable or disable navigation to Customer Standard from the eBusiness Center.	ASRU	Yes
	11.5.8	OTS: Enable Email Center Integration	TeleSales	eBusiness, Opportunity, and Lead Centers	If set to <i>Yes</i> , then Oracle eMail Center is implemented, and the agent is assigned the eMail Center role, the agent can click an e-mail address to open an e-mail addressed to the customer and send it via eMail Center. If set to <i>No</i> , then the agent's default e-mail client opens. Profile can be set at site, application, and responsibility levels. It is not a user profile.	ASR	No
		OTS: Enable SQL Tracing	TeleSales		To enable or disable SQL tracing	ASRU	No
		OTS: Generate Collateral Activity	TeleSales	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of collateral activities such as sending out collateral.		No
		OTS: Generate Customer Activity	TeleSales	Universal Work Queue	If set to <i>Yes</i> , the application generates a record of activities related to customer records.		No

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Generate Event Activity	TeleSales	Universal Work Queue	If set to Yes, the application generates a record of activities related to events.		No
		OTS: Generate Lead Activity	TeleSales	Universal Work Queue	If set to Yes, the application generates a record of activities related to leads.		No
		OTS: Generate Opportunity Activity	TeleSales	Universal Work Queue	If set to Yes, the application generates a record of activities related to opportunities.		No
		OTS: Hang Up on End	TeleSales		Hang up the telephone at the end of the interaction.	ASRU	
		OTS: Identifying Address	TeleSales	Organizations, Persons	A Yes setting sets the address displayed in the header to be the identifying (primary) address for the party.	ASRU	
		OTS: Interaction-Default Action Item	TeleSales	Interaction History	<p>The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction -Default Action whenever the user does not perform an action required to wrap up an interaction.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is the module name where the interaction is started. For example, if an interaction is started in opportunity center, then it is Opportunity.</p>	ASRU	Customer
		OTS: Interactions-Default Action	TeleSales	Interaction History	Users must perform at least one activity for the interaction to end. If user doesn't perform any activity but ends the interaction anyway, then the application uses the default action set in this profile and the default action item from the profile OTS: Interaction -Default Action Item. The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If no settings, then the application functions as if the value is Query.	ASRU	Interact with the Item

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Interactions-Default Outcome	TeleSales	Interaction History	<p>This profile determines the default value of the Outcome field in the wrap-up window.</p> <p>This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome associated with the campaign schedule for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign schedule.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is Outcome with outcome id = 1 (No Answer).</p>	ASRU	Maintenance
		OTS Interactions-Enable Auto Wrap-Up	TeleSales	Interaction History	<p>When this profile is set to No, the wrap-up window appears automatically prompting users to enter the outcomes and reasons for the activity. When this profile is set to Yes, then the interaction ends automatically without the users seeing the wrap-up window.</p> <p>The interaction ends when the user starts work on a record from a different party or The user closes the window where the interaction was started.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.</p>	ASRU	No

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Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS Interactions-Enable Automatic Start	TeleSales	Interaction History	<p>A Yes setting for this profile option enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting interactions manually.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.</p>	ASRU	No
		OTS Interactions-Enable Change Activity	TeleSales	Interaction History	<p>Set to Yes to allow allows user to change system recorded activities in the wrap-up window.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.</p>	ASR	No
		OTS: Interactions-Generate Collateral Activity	TeleSales	Interaction History	<p>Yes: Tracks activities related to collateral. No: Disables interaction tracking for the creation of collateral orders.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.</p>	ASRU	No
		OTS: Interactions-Generate Customer Activity	TeleSales	Interaction History	<p>Yes: Tracks activities related to customer records.</p> <p>No: Disables tracking of activities related to customer records.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.</p>	ASRU	No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Interactions-Generate Event Activity	TeleSales	Interaction History	Yes: Tracks activities related to events.  No: Disables tracking of activities related to events.  The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.	ASRU	No
		OTS: Interactions-Generate Lead Activity	TeleSales	Interaction History	Yes: Tracks activities related to leads.  No: Disables tracking of activities related to leads.  The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.	ASRU	No
		OTS: Interactions-Generate Opportunity Activity	TeleSales	Interaction History	Yes: Tracks activities related to opportunities.  No: Disables tracking of activities related to opportunities.  The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.	ASRU	No
		OTS: Interactions-Generate Task Activity	TeleSales	Interaction History	Yes: Tracks activities related to tasks.  No: Disables tracking of activities related to tasks.  The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.	ASRU	No

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Interactions-Record Media Item ID	TeleSales	Interaction History	<p>Interactions track different types of communications with customers including emails and phone calls placed via Oracle inbound and outbound telephony applications. The record includes a unique identifier for the communication. This profile determines if that unique identifier is recorded or not. This identifier is never displayed for the user.</p> <p>A setting of Yes records the identifier. A setting of No does not record the identifier.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is Yes.</p>	ASRU	Yes
		OTS: Interactions-Start On Query	TeleSales	Interaction History	<p>When interaction is enabled, setting this profile to Yes will start an interaction when a record is queried up.</p> <p>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is No.</p>	ASRU	No
		OTS: JSP Details from OTS	TeleSales		Allow JSP Details from OTS	ASR	
		OTS: Lookup Export Directory Path	TeleSales		Lookup Export Directory Path	ASRU	/home /
	11.5.8	OTS: Marketing List All Campaign	TeleSales	Universal Work Queue	Setting this profile to "No" displays only your own lists in Universal Work Queue. A setting of "Yes" displays all lists in Universal Work Queue.	ASRU	No
		OTS: Match DNIS FOR Source Code	TeleSales	Universal Work Queue	Set Yes for UWQ to search source codes by DNIS.	ASRU	No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Max Interactions Displayed	TeleSales	eBusiness Center	Determines how many interactions to display in the overview tab.  The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is 10.	ASRU	10
		OTS: Minimum Number of Characters for Lookup	TeleSales	All searches	Improves search performance by forcing agents to use a minimum number of characters for their searches.	ASRU	None
		OTS: Number of Days Prior to View	TeleSales	Lead, Opportunity	Sets the default value of days for leads and opportunities	ASRU	
		OTS: Number of Months to view Notes and Interactions for	TeleSales	eBusiness Center	Default value for months of notes/interactions to view.  The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is 1.	ASRU	1
		OTS: Order Source Code	TeleSales		To order collateral through order capture, this collateral source code is used.	ASRU	1
		OTS: Primary Contact Role Flag	TeleSales	Organizations, Persons	Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window.	ASR	Y
	11.5.8	OTS: Relate Account to Tasks and Notes	TeleSales	eBusiness Center Tasks	Set to Yes to automatically add the account displayed in the eBusiness Center header as related to the task being created. Profile can be set at the site, application, and responsibility levels.	ASR	
		OTS: Script Language	TeleSales	Scripting	Select the language to be used for scripts. If profile is not set, then the language is AMERICAN.	ASRU	

Table of System Profile Options

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Script Launch on Interaction	TeleSales	Scripting	When the profile <i>OTS: Scripting Installation</i> is set to Yes, setting this profile to Yes enables automatic script launching on start of an interaction; setting this profile to No disables automatic script launching on start of an interaction. When this profile is not set, it's handled the same as No.	ASRU	
		OTS: Script Launch on UWQ Delivery	TeleSales	Scripting, Universal Work Queue	When the profile <i>OTS: Scripting Installation</i> is set to Yes and the profile <i>OTS: Script Launch on Interaction</i> is set to Yes, setting this profile to Yes enables automatic script launching on UWQ delivery. Setting this profile to No disables automatic script launching on UWQ delivery. When this profile is not set, it's handled the same as No.	ASRU	
		OTS: Scripting Installation	TeleSales	Scripting	Set to Yes if scripting has been installed for TeleSales.	ASRU	
		OTS: Show All Lists	TeleSales	Universal Work Queue Marketing List Node	No: User will only be able to see those campaigns (and associated contact list) which has been assigned to the user using the campaign to agent/agent to campaign assignment admin.  Yes: User will be able to see all campaigns (and associated contact list). The user does not have to be assigned to a particular campaign.		No
		OTS: Show Campaign and Offer Names Instead of Codes	TeleSales		If set to yes, shows the campaign and offer name instead of code.	ASRU	
		OTS: TeleSales Interaction Enabled	TeleSales	Interactions	If set to Yes, TeleSales records interactions after the interaction is started.		No
		OTS: TeleSales Interactions on Query Enabled	TeleSales	Interactions	If set to Yes, will begin an interaction once the record is queried up.		
		OTS: URL to display a map of the address	TeleSales	eBusiness Center	Enter a URL to display a map of the address in the Address Tab of eBusiness Center	ASRU	
		OTS: UWQ Default Source Code	TeleSales		Source Code to be used during Advanced Inbound Screen Pop	ASRU	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		Start Menu In Quick Menu	TeleSales	eBusiness Center	Set the value to TeleSales Quick Menu to enable the Quick Menu for TeleSales. All applications using Quick Menu share this profile option.		
		Task Manager: Default Assignee Status	TeleSales	Task Assignment	Sets the default task status in the Task Assignment window		
		Task Manager: Default Priority	TeleSales				
		Task Manager: Default Task Status	TeleSales	eBusiness Center Task tab	Sets the default task status in the Task tab of the eBusiness Center		
		Task Manager: Default Task Type	TeleSales				



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## Concurrent Programs

This appendix provides a table of all of the concurrent programs used by the Oracle Sales Family of eBusiness Suite applications. Each concurrent program in this table is also described in the implementation step where it is set.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)

### B.1 Running Concurrent Programs

The procedure for running concurrent programs is the same for all Oracle applications.

#### Steps

1. Log in to the Forms application.
2. Select the Oracle Sales Administrator responsibility.
3. Double-click **Concurrent Requests**.
4. Double-click **Run**.

5. Select the Single Request radio button.
6. Click **OK**.
7. Search for the concurrent request that you want to run.
8. Click **Submit**.
9. Select from the search results.
10. Click **OK**.
11. Click **OK** to run the concurrent request.

For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

## B.2 Table of Concurrent Programs

The following table lists by name and in alphabetical order the concurrent programs used by the Oracle Sales Family of eBusiness Suite applications. The table includes the following columns from left to right:

- **Mandatory:** Is the program mandatory for the function?
- **Concurrent Program Name:** Name of the concurrent program.
- **Description:** Explains what the concurrent program does.

<b>Mandatory</b>	<b>Concurrent Program Name</b>	<b>Description</b>
No	Assign Territory Accesses	<p>This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. It requires setting three profile options:</p> <p>OS: Territory Minimum Number of Records for Parallel Processing</p> <p>OS: Territory Number of Child Processes</p> <p>OS: Territory Records to Open for Processing Changed Accounts</p> <p>Run this program after completing the setups in Setting Up Territory Management, and after the JTF Concurrent program "Generate Territory Package" has run.</p> <p>Parameters:</p> <p>Run Mode (New/Restart/Total)</p> <p>Lead Status: (All/Open/Closed)</p> <p>Previous Request ID for restart mode only.</p>
No	Autocreate Opportunity from Sales lead	<p>Creates opportunities from existing sales leads. This program should be run after the Import Sales Leads program. Parameters:</p> <p>Debug Mode</p> <p>Trace Mode</p>
No	Drop Temp Tables for Home Page Materialized Views	<p>This will clean up all the Temp tables that were created during the Initial Load or Opportunity and Leads Reports bin jobs. This does not require any parameters.</p>
	Flatten Group Hierarchy	<p>An Oracle Foundation (JTF) concurrent program needed in order to show updated information or changes in relationships such as parent/child.</p>
No	Generate Access Records	<p>This is a child program of Assign Territory Accesses and does not need to be run separately.</p>
	Generate Keys for Fuzzy Match	<p>This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically</p>

Mandatory	Concurrent Program Name	Description
	Generate Territory Packages	This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
No	Index Creating for Missing Indexes for Materialized Views	This will create any missing index for the materialized views and reanalyzes the materialized view tables. This does not require any parameters
Yes	Initial Build of Forecast Summary Tables	This program will build the materialized view used for forecasting. This program must be run initially before users can forecast. Run after Refresh AS_PERIOD_DAYS, Refresh of AS_PERIOD_RATES, and Refresh of AS_SALES_CREDITS_DENORM.
Yes	Initial Build of Opportunity and Lead Bins	Used for the Opportunity and New Leads home page bins and reports. This program must be run initially before users can set up opportunity and new leads bins and reports. This program loads the opportunity and leads materialized view with sales credit information. A new parameter: "Next Extent Size" has been added. You can choose the value of the next extent to be allocated for all tables and indexes created. Possible values for the parameter are: Small (1M), Medium (5M), Large (10M)
		<b>Note:</b> This program must be run anytime the as_sales_credit_denorm is rebuilt or when values such as sales stages and statuses have changed. You should also run when Refresh AS_PERIOD_DAYS is run.
Yes	Initial Load for Lead Reports	This program is used to build Leads bins and reports. This should also be run following Refresh of Leads Bins Data so that you can see the latest values in leads reports.
Yes	Initial Load for Opportunities Reports	This program is used to build opportunity bins and reports. This should also be run following Refresh of Opportunity Bins Data so that you can see the latest values in opportunity reports.
No	Load Interest Types and Codes to Inventory Categories (Load Categories)	This concurrent program creates inventory categories under the inventory category set "Oracle Sales and Marketing" for each combination of interest types and codes. In order to use this concurrent program, the OS: Inventory Category Integration profile value must be set to Yes.

Mandatory	Concurrent Program Name	Description
	Opportunity Exchange - Get Opportunities	This program will poll the LETS server and retrieve the relevant partner opportunity details. This program should be run at regular intervals by users with Opportunity Exchange privileges.
	Opportunity Exchange - Push Opportunities	This program will send the information to the LETS server to be picked up by the partners. This program should be run at regular intervals by users with Opportunity Exchange privileges.
No	OTS: Load Sales Lead Interface Table from Flat File	Use this program to import sales leads from the interface. This program must be run before Auto Create Opportunity from Sales Lead. This moves data from the interface table to AS_SALES_LEADS, AS_SALES_LEADS_LINES, and AS_SALES_LEAD_CONTACTS. If you want to import data from a flat file, you must first run OTS: Load Sales Lead, which will move data from the flat file to the interface table.
Yes	Periodically Purge ASF_RECORD_VIEW_HISTORY	This table memorizes which records a user has visited. In order to prevent the table from growing too large, the program should be run as least once a week. If you are running on a database whose table space is a problem, run this program daily.
Yes	Purge Deleted Lists	<p>This program should be scheduled to run periodically. The time interval between any two schedules for this program should be at least the number of days specified for ASF_LIST_MIN_PURGE_AGE_IN_DAYS profile for maximum effectiveness. The program does not take any parameters.</p> <p>A value of 10 is set for this profile (ASF_LIST_MIN_PURGE_AGE_IN_DAYS) and the concurrent program may be scheduled to run every 14 days if the profile has not been modified. These are suggested values for the profile and for periodically scheduling the concurrent program. They may be altered depending on whether a large or small number of lists are created or deleted within a short time period.</p>
No	Refresh AS_PERIOD_DAYS table	<p>This program must be run before you can run the Refresh of as_sales_credits_denorm (in complete mode), Initial Build of Opportunity Bins, and the Build Materialized View for Forecast Main Page. This sequence of programs must be rerun if the GL period definitions are changed.</p> <p>If this program is run, then the following programs must also be run: Refresh of AS_SALES_CREDITS_DENORM (Complete), Refresh of Forecast Summary Tables, Initial build of Opportunity Bins Data</p>
	Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)	Will refresh the multi-currency conversion rates in setting multiple currency.

Mandatory	Concurrent Program Name	Description
Yes	Refresh of as_sales_credits_denorm	<p>Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters are:</p> <p>Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh).</p> <p>Incremental Refresh = Run in this mode for an incremental refresh</p>
	Refresh of Customer Classification Denormalization	<p>Complete data refresh to populate the denorm table as_hz_class_code_denorm.</p> <p>Parameters: Debug or SQL Trace</p>
	Refresh of Forecast Summary Tables	<p>This program is used to refresh the materialized view used for forecasting. This program should be run periodically.</p>
No	Refresh of Leads Bin Data	<p>This program is used to run an incremental refresh of the materialized view used for the Leads bins and reports. This program should be scheduled to run periodically.</p>
No	Refresh of Opportunity Bins Data	<p>This program is used to run an incremental refresh of the materialized view used for the opportunity bins and reports. This program should be scheduled to run periodically.</p> <p><b>Note:</b> Users will not see opportunities in bins created after the last refresh of "refresh sales credit".</p>
	Setup Checking for Oracle Sales application	<p>This program validates Sales Setups and produces an error log that the system administrator can use to diagnose invalid setups.</p> <p>Parameters:</p> <p>Upgrade - Yes/No</p>

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# Lookups

This appendix provides a table the lookups used by the Oracle Sales Family of eBusiness Suite applications. It includes lookups with three different levels of modification:

- **System (S):** The implementer can only change the wording of a list of values (LOV) choices the user sees on the screen. No deletions or additions are allowed.
- **Extensible (E):** The implementer can change both the wording of the LOV choices and add new choices for the user.
- **User (U):** The implementer can change the lookup completely, deleting and adding LOV choices at will.

For information about viewing and modifying lookups, please refer to the *Oracle Applications System Administrator's Guide*.

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**Note:** For release 11.5.6 and earlier, Look up values are cached in the middle tier and jserv needs to be bounced in order to see the changes right way in a drop down menu. Beginning with release 11.5.7, the cache can be cleared using JTF cache manager without bouncing the middle tier.

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## C.1 Table of Lookups

The following table lists lookups for the Sales Family of eBusiness Suite applications, their values or defaults, the areas they affect, and the access level.

App.	Lookup Type	Values	Affects	Level
	ASF_CHART_SERIES_COUNT		Number of series to show in a chart.	U
	ASF_CHART_VALUE_TYPES		Value type for Y axis in charts (Count/Amount).	U
	ASF_MODULE_FUNCTION_ATTR		Lookup for default login page features.	U
	ASF_LIST_QUERY_FILTERS	Detail (Title, Gender, Sales Group) Relationship (Person to Organization, Person to Person, Department Type, Job Title Type, Role) Address (Country) Customer Classification (Class Category)	Contact list filters	
	BUDGET_STATUS	APPROVED (Approved) NOT_APPROVED (Not approved) PENDING (Pending)	Leads budget status	
	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Leads close reason	

App.	Lookup Type	Values	Affects	Level
	DECISION_TIMEFRAME	1-3 MONTHS 3-6 MONTHS 6-12 MONTHS MORE THAN 1 YEAR WITHIN 1 MONTH WITHIN 1 WEEK	Leads time frame	
	LEAD_CONTACT_ROLE	DECISION_MAKER (Decision maker) END_USER (End user)	Leads contact role	
	LINK_TYPE		Lookup for tools administration page.	
	PARTY_RELATIONS_TYPE	BENEFACTOR_OF (Benefactor of) BOARD_MEMBER_OF (Board member of) CONTACT_OF (Contact of) CUSTOMER_OF (Customer of) EMPLOYEE_OF (Employee of) STOCK_HOLDER_OF (Stock holder of)	Leads relationship type	

App.	Lookup Type	Values	Affects	Level
	PARTY_RELATIONS_TYPE (continued)	MEMBER_OF (Member) MOTHER_OF (Mother) OWNED_BY (Owned) PARENT_OF (Parent) PARTNER_OF (Partner) PAYFROM_OF (Alternate party to pay for a buyer) PAYTO_OF (Alternate payee name for the seller) PUBLISHER (Publisher) REFERENCE_FOR (Reference) _OF (Relative) REPAIR_DEPOT_PROVIDER_FOR (Repair depot provider) REPORTS_TO (Reports to) SELLER_FOR (Seller) SELLER_TO (Seller to) SHIPTO_OF (Alternate shipping party for the buyer) SIBLING_OF (Sibling) SISTER_OF (Sister) SON_OF (Son) SPOUSE_OF (Spouse) STOCK_HOLDER_OF (Stockholder) STUDENT_OF (Student) SUBSIDIARY_OF (Subsidiary) THIRD_PARTY_OF (Third party) UNCLE_OF (Uncle) VAD_OF (VAD of) VAR_OF (VAR of) VENDOR_OF (Vendor)		

App.	Lookup Type	Values	Affects	Level
	RANK_ID	1 (Cold lead) 2 (Low lead) 3 (Medium lead) 4 (Hot lead)	Lead rank	
	REJECT_REASON_CODE	ASSIGN_ERROR (Assign error) DUPLICATE (Duplicate) VACATION (Vacation)	Leads decline reason	
	SALES_CHANNEL	DIRECT (Direct) INDIRECT (Indirect)	Sales Channel	S
	STATUS_CODE	NEW (new) UNQUALIFIED (unqualified) QUALIFIED (qualified) ACCEPTED (accepted) LOSS (loss) DEAD_LEAD (dead lead) DECLINED (declined) CONVERTED_TO_OPPORTUNITY (lead converted to opportunity)	Lead status	
	VEHICLE_RESPONSE_CODE	EMAIL FAX LETTER PHONE USER VOICE_MESSAGES WEB	Lead response channel	
	RELATIONSHIP_TYPE	ALL (seeded value)	Accounts	
	TAX_CODE		Accounts	
	PAYMENT_TERM		Accounts	
AMS	AMS_EVENT_PAYMENT_STATUS		Events	
AR	ACCOUNT_STATUS		Accounts	

## Table of Lookups

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<b>App.</b>	<b>Lookup Type</b>	<b>Values</b>	<b>Affects</b>	<b>Level</b>
AR	ACCT_ROLE_TYPE		Accounts	
AR	ADDRESS_LABEL		eBusiness Center	
AR	CODE_STATUS		Persons, organizations, Accounts	
AR	COMMUNICATION_TYPE		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE	ADMINISTRATIVE_CONTACT_FOR (Administrative Contact For) BILL_PRESENTMENT_ADMIN (Bill Presentment System Administrator) BILL_PRESENTMENT_CSR (Bill Presentment System Customer Service Representative) BILL_PRESENTMENT_ORG_REP (Bill Presentment System Organization Representative) BILL_PRESENTMENT_SITE_ADMIN (Bill Presentment System Site Administrator) BILL_TO (Bill To) BUYING_CONTACT_FOR (Buying Contact For) CEO_OF (CEO) CFO_OF (CFO) CIO_OF (CIO) CONTACT (Contact) CORR (Correspondence) DEPT_HEAD (Department Head) DUN (Dunning) EXECUTIVE (Executive) KEY_DECISION_MAKER_FOR (Key Decision Maker) LEGAL (Legal) LEGAL_CONTACT_FOR (Legal Contact For)	Persons, organizations	E

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE (continued)	MARKET (Market) MIDDLE_MANAGER (Middle Manager) PRIMARY_CONTACT_FOR (Primary Contact For) RECEIVING_CONTACT_FOR (Receiving Contact For) SHIPPING_CONTACT_FOR (Shipping Contact For) SHIP_TO (Ship To) STMTS (Statement) STOCK_HOLDER_OF (Stock Holder) TECHNICAL_CONTACT_FOR (Technical Contact For)		
AR	CONTACT_TITLE	DR (Dr.) MISS (Miss) MR (Mr.) MRS (Mrs.) MS (Ms.) SIR (Sir)	Persons, organizations	E
AR	CONTACT_TYPE		Persons, organizations, events, collateral	
AR	COUNTRY		eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting	
AR	CREDIT_RATING		Persons, Organizations	
AR	CUSTOMER_CATEGORY	CUSTOMER (Customer) PROSPECT (Prospect)	Accounts. persons, organizations	E

App.	Lookup Type	Values	Affects	Level
AR	CUSTOMER_TYPE		eBusiness Center	
AR	DAY		eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue	
AR	DECISION_FACTOR_TYPE		Accounts, Opportunity Contacts	
AR	DECISION_PRIORITY_TYPE		Accounts	
AR	DEPARTMENT_TYPE	ACCOUNTING ADMINISTRATION CUSTOMER SERVICE DISTRIBUTION/LOGISTICS ENGINEERING FACILITIES HUMAN RESOURCES INFORMATION TECHNOLOGY LEGAL MANUFACTURING MARKETING MERCHANDISING OPERATIONS PURCHASING QUALITY ASSURANCE R&D (Research & Development) RISK ANALYSIS SALES TRAINING	Persons, organizations, lookup	U

Table of Lookups

App.	Lookup Type	Values	Affects	Level
AR	FOLLOW_UP		Opportunities, Universal Work Queue	
AR	FORM_NAME		eBusiness Center, persons, organizations, leads, quotes/orders, Universal Work Queue	
AR	INTEREST_TYPE	ENTERTAINMENT HOBBIES PREFERENCES SPORTS TRAITS	Leads, opportunities, lookup	E
AR	JOB_TITLE_CODE		Persons, Organizations	
AR	LANGUAGE	ENG (English) FRE (French) GER (German) ITA (Italian) SPA (Spanish)	Persons, organizations, opportunities, events, lookup, scripting	E
AR	MONTH		Lookup	
AR	NOTE_TYPE		eBusiness Center, leads, opportunities, events	
AR	OWNER_TABLE_NAME		Persons, organizations, opportunities, lookup	

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE	ADVERTISER (Advertiser) AFFILIATE_TO (Affiliate) AGREEMENT_SIGNER_OF (Party that signs agreement on behalf of another party) ASSOCIATE_OF (Associate of) AUNT (Aunt) BENEFACTOR_OF (Benefactor of) BENEFICIARY (Beneficiary) BILLER_AT (When an organization is registered biller) BILLER_FOR (Biller For) BILLTO_OF (Alternate billing party for the buyer) BILL_CONSOLIDATOR_AT (Bill consolidator at) BILL_CONSOLIDATOR_FOR (Bill Consolidator for) BILL_PRESENTER_FOR (Bill Presenter at) BILL_PUBLISHER_AT (Bill publisher at) BILL_PUBLISHER_FOR (Bill publisher for) BOARD_MEMBER_OF (Board Member) BROTHER_OF (Brother) BUSINESS_PARTNER_FOR (Business partner) CEO_OF (CEO) CFO_OF (CFO) CHANNEL_FOR (Channel) CHILD_OF (child of) CIO (CIO) COMPETITOR_OF (Competitor)	Persons, Organizations	

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE (continued)	CONSULTANT_FOR (Consultant) CONTACT_OF (Contact) CONTAINS_MEMBER (Contains member) COUSIN_OF (Cousin) CUSTOMER_OF (Customer) DAUGHTER_OF (Daughter) DEPENDENT_OF (Dependent) DIVISION_OF DOMESTIC_PARTNER_OF (Domestic Partner) DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of) DOMESTIC_ULTIMATE_OF (Domestic Ultimate of) EMPLOYEE_OF (Employee) EMPLOYER_OF (Employer) FATHER_OF (Father of) FIELD_SERVICE_PROVIDER_FOR (Field Service provider) GENERAL_EMPLOYEE_OF (General Employee) GLOBAL_SUBSIDIARY_OF (Global subsidiary of) GLOBAL_ULTIMATE_OF (Global Ultimate of) GUARANTOR_FOR (Guarantor) GUARDIAN_OF (Guardian) HEADQUARTERS_OF (Headquarters of) KEY_DECISION_MAKER_FOR (Key decision maker) LEGAL_COUNSEL_FOR (Legal counsel for) MANAGER_OF (Manager_of)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE	ACK (Acknowledgments) ADMINISTERED_BY (Administered By) BILL_TO (Bill To) BOL (Bills of Lading) BUSINESS (Business) CM (Credit Memos) COLLATERAL_MAIL_TO (Collateral Mail To) CORR (Correspondence) CUSTOMER_REGION (Customer Region) DELIVER_TO (Deliver To) DRAWEE (Drawee) DUN (Dunning) GENERAL_MAIL_TO (General Mail) HEADQUARTERS_FOR (Headquarters for) HOME (Home) INCORPORATED_TO (Incorporated) INSTALL_AT (Install At) INV (Invoice) ISSUED_BY (Issued By) KEY_SITE (Key Site) LEGAL (Legal) LEGAL_ADDRESS_OF (Legal Address) LEGAL_RESIDENCE_OF (Legal Residence) MARKET (Market) MARK_FOR (Mark For) NOT_ALLOWED_INTO (Not Allowed Into) OFFER_TO (Offer to)	Persons, Organizations	

Table of Lookups

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App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE (continued)	OTHER (Other) PAYMENT_WILL_BE_MADE_BY (Be Made By) PAY_TO (Pay To) REPLY_TO (Reply To) REPORT_TO (Report To) RESIDES_AT (Resides At) SHIP_FROM (Ship From) SHIP TO (SHIP_TO) SOLD_TO (Sold To) STMTS (Statements) STORE (Store) SUPPORT_SITE (Support Site) WORKS_AT (Works At) WORK_PERFORMED_AT (Work Performed At)		
AR	PARTY_TYPE		eBusiness Center, persons, organizations, accounts, leads, opportunities, quotes/orders, events, collateral	
AR	PAYMENT_TYPE		Events	

App.	Lookup Type	Values	Affects	Level
AR	PHONE_LINE_TYPE	FAX (Fax) GEN (General) IW (Inbound watts) OW (Outbound watts) VM (Voice mail) ASSISTANT (Assistant) HOME (Home) MOBILE (Mobile) OFFICE (Office) PAGER (Pager)	Persons, organizations, opportunities	E
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	RESPONSIBILITY	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Recievable Supervisor) CFO (Chief Financial Officer) COLCT (Collections) COLCTSUP (Collections Supervisor) CONTRLR (Controller) GLC (General Ledger Clerk) GLS (General Ledger Supervisor) SOC (Sales Operation Clerk) SOS (Sales Operations Supervisor) TRSUR (Treasurer)	Persons, organizations, Universal Work Queue	E
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	ACCESS_PRIVILEGE	F (Full unrestricted access) P (Prospecting Access) T. (Sales Team Access)	Access privilege for employee	S

App.	Lookup Type	Values	Affects	Level
AS	ASTATA_RUN_MODE	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)	Run mode for Territory Assignment concurrent program	S
AS	AUTO_ASSIGNMENT_TYPE	Both None PRM TAP	Automatic assignment type	S
AS	BUDGET_AMOUNT		Leads, lookup	
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Opportunity close reason	E
AS	CONTACT_RANK_ON OPPORTUNITY	DECISION_MAKER END_USER	Opportunity contact rank	U
AS	DECISION_TIMEFRAME		Leads	
AS	FLAG	N (No) Y (Yes)	Flag	S
AS	INTEREST USE	COMPANY_CLASSIFICATION (Customer Classification) CONTACT_INTEREST (Contact Interest) LEAD_CLASSIFICATION (Lead or Opportunity Classification)	Interest use	S
AS	INTEREST_USE		Opportunities	
AS	ISSUE		eBusiness Center, leads, opportunities	

App.	Lookup Type	Values	Affects	Level
AS	LEAD_CONTACT_ROLE		Leads	
AS	LEAD_SOURCE		Leads, opportunities	
AS	MC_DATE_MAPPING_TYPE	E (End date of a period) S (Start date of a period)	Date mapping type	U
AS	METHODOLOGY_TYPE	OOP (Object Oriented)	Opportunity methodology type	E
AS	OPP_ACCESS_PRIVILEGE	F (Full Unrestricted Access) O (Full Access by Operating Unit) P (Prospecting Access) T (Sales Team Access)	Opportunity access privilege	S
AS	OPP_PROBABILITY_LINK	Error (New value is not acceptable) Warning (Warn user about error)	Opportunity probability links	S
AS	PLAN_ELEMENT_MAPPING	PCODE (Map quota to primary interest code) SCODE (Map quota to secondary interest code) TYPE (Map quota to interest type)	Sales categories mapping with sales quotas (Oracle Incentive Compensation)	S
AS	PRM_LEAD_TYPE		Opportunities	
AS	REJECT_REASON_CODE	ASSIGN_ERROR DUPLICATE VACATION	Leads	
AS	ROLE_TYPE		Persons, Organizations, accounts, lookup	
AS	ROLE_TYPE	AM (Account Manager) PS (Product Specialist)	Role type	U
AS	SALESFORCE_RELATIONSHIP		Opportunities	
AS	SCD_REFRESH_MODE	1 (Complete refresh) 2 (Incremental refresh)	Sales Credit Denorm refresh mode	U

App.	Lookup Type	Values	Affects	Level
AS	SCD_RUN_MODE	1 (Complete) 2 (Update)	Sales Credit Denorm run mode	E
AS	UPDATE_ACCESS		eBusiness Center	
AS	UPDATE_ACCESS	I (Inherit data) R (View data) U (Update subordinate's data)	Update access	S
AS	VEHICLE_RESPONSE_CODE		Leads	
AS	VEHICLE_RESPONSE_CODE		Opportunities	
AS	VEHICLE_RESPONSE_CODE		Lookup	
ASO	ASO_ITEM_TYPE		Accounts	
ASO	ASO_QUOTE_RELATED_Objects		Quotes/Orders	
JTF	ACTION_TYPE	ADD ANSWER CREATE_FSR DEL INQ INTERACT RECONCILE SENT TRANSFER UPD UPDATE_FSR UPSELL WAIT XSELL	Events, Universal Work Queue	
JTF	JTFB_GRAPH_COLOR_PALETTE		Color of chart legends	
JTF	ROLE_TYPE		Sales Team	



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## Implementing Oracle Sales Offline Edition

This appendix provides the information you will need to implement Oracle Sales Offline Edition.

As a field sales representative, you are often out of the office working with prospects and customers on sales opportunities and customer issues. It is important for you to be well-informed of the activities and issues of each customer with which you meet. Oracle provides a solution to help you manage your customers, contacts, opportunities, and forecasts. This solution is known as Oracle Sales Offline Edition. This product is a customized template that imports and exports information from an Oracle enterprise database. This template allows you to view and/or update information without being on your company system or calling someone at the office.

### D.1 Implementation Steps

This section describes how to implement the Oracle Sales Offline Edition.

#### **Prerequisites**

Customer has fully implemented Oracle Sales Online.

#### **Steps**

Complete following steps to implement Oracle Sales Offline Edition.

1. Ensure that the customer has fully implemented Oracle Sales Online.
2. Ensure that the customer has licensed Oracle Mobile Field Sales/Laptop (ASL) and applied the Sales Offline Edition patches using ADpatch.
3. After applying the patches, clear the Jserv cache.

4. Restart the application server.