Oracle® Sales Online

User Guide

Release 11*i* (11.5.9)

Part No. B10564-01

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Oracle Sales Online User Guide, Release 11*i*

Part No. B10564-01

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Sales Online User 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 aimed at the following users:

- Administrators
- Sales Representatives
- Sales Managers
- Sales Executives

How To Use This Guide

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

Introduction to Oracle Sales Online

Oracle Sales Online is an HTML based application which provides sales managers, sales representatives, and sales executives assistance in managing their business opportunities, customers, forecasting, incentive compensation, partners, and quotes. Sales Online enables the management of business data using the Trading Community Architecture (TCA) customer model. TCA enables Sales Online to support complex relationships which further allows Sales Online users to provide exceptional service to customers. Sales Online is integrated with Oracle TeleSales, Oracle Marketing, Oracle Partners Online, and Oracle Incentive Compensation.

- Chapter 1 is an introduction to Oracle Sales Online. This chapter covers the main concepts underlying the functionality in the application, the key features, integrations, and process flows.
- Chapter 2 is an overview of using the application's administration functions and a summary of the tabs that are available.
- Chapter 3 is an overview of items that will be helpful in getting started with the application. It covers items such as, setting profiles, quick search and advanced search, managing account settings, and personalization.
- Chapter 4 covers the home page. It includes information on setting up and editing bins, charts, and reports, and using the lookup tools.
- Chapter 5 is an overview of the Calendar tab. Information covered in this chapter includes, calendar profiles, views, creating appointment, notes, and tasks.
- Chapter 6 describes the leads functionality.
- Chapter 7 includes information about handling opportunities.Topics include: creating, copying, and closing opportunities. You can also manage information for sales teams, leads, competitors, win/loss tracking, sales credits, notes, tasks, and attachments.
- Chapter 8 includes information about how quoting functionality is handled in this application. Quoting is an integrated function. Detailed information is located in the Oracle HTML Quoting User Guide.

- Chapter 9 includes information about forecasting. Topics include: creating and submitting worksheets, viewing forecast history, and linking to compensation. You can also manage information for notes and attachments.
- Chapter 10 describes the functionality available from the Customer tab. Topics include organizations, people, contacts, and contact lists.
- Chapter 11 includes an overview of the integration with Partners Online.
- Chapter 12 describes the information that is available through integration with Oracle Incentive Compensation.
- Chapter 13 includes information about using Fulfillment with Oracle Sales Online. This integration provides users with the ability to send collateral (email) to customers.
- Chapter 14 includes information for system administrators to manage administrative set ups and tasks for the application.
- Chapter 15 is for Mobile integration. It refers users to the documentation for Oracle Field Sales/Laptop documentation.

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 11*i* versions of those guides.

Online Documentation

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

Related Documentation

Oracle 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 users guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Inventory User's Guide

This guide contains information about product features and functions for Oracle Inventory.

Oracle Marketing User Guide

This document is a printed compilation of the Oracle Marketing help system, including implementation information.

Oracle Marketing Encyclopedia User Guide

This document is a printed compilation of the Oracle Marketing Encyclopedia online help system.

Oracle Incentive Compensation User Guide

This document contains information about setting up and using Oracle Incentive Compensation.

Oracle Incentive Compensation Implementation Guide

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

Oracle Partners Online User Guide

This document is a printed compilation of the Oracle Partners Online user guide.

Oracle Partners Online Implementation Guide

This guide describes set up and configuration tasks required to implement Oracle Partners Online.

Oracle CRM Application Foundation User Guide

This guide contains information on setting up and using Oracle CRM Application Foundation.

Oracle Quoting Implementation Guide

This manual describes how to implement Oracle Quoting.

Oracle HTML Quoting User Guide

This manual contains information on using Oracle HTML Quoting.

Oracle Sales Online Technical Reference Manual

This manual contains table and view descriptions for Oracle Sales Online.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle 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 Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

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 Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, 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

Introduction and Overview

This part contains the following chapters:

1

Introduction to Oracle Sales Online

This chapter discusses the key features and process flows of Oracle Sales Online. Sections in this chapter include:

1.1 Overview

Oracle Sales Online is an application that is designed for field sales representatives, sales managers, and executives. The application provides a complete set of tools that enables sales teams to manage the sales cycle from beginning to end. Oracle Sales Online supports the key functions of the sales cycle, with features such as:

- Comprehensive customer management
- Lead and opportunity management
- Forecasting
- Quote generation

- Order placement
- Sales methodologies

Oracle Sales Online is part of the Oracle E-Business Suite, an integrated suite of applications for the enterprise, including both Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM). Our web architecture enables global deployment, painless and easy upgrades for remote users, and easy configuration. The application is accessible to all users, anytime, anywhere.

Traditional Sales vs. e-Business Sales Model

In traditional sales models, sharing leads and information about customers within a company and between the company and its partners has been difficult. Inside sales representatives, field sales representatives, telesales agents, and partners usually do not have access to the same repository of customer information. As a result, important data about the customer experience, such as service requests or recent purchases from an alternative sales channel, may not be readily available to the sales force. Traditionally, this information is maintained and stored separately from sales information. Separate repositories of information are sometimes referred to as “information silos” because it is difficult to move information among the different repositories.

In the e-Business sales model, the sales force, partners, and customers work through various channels of interaction, including the Web, e-mail, direct sales and telesales to generate orders, with links to back office systems such as inventory, pricing, and product configuration. The benefits for customers, salespeople, and partners to this approach include the ability to:

- Work on leads and opportunities through multiple channels
- Work collaboratively across channels
- Provide a single point of entry to backend systems
- Enforce a single sales model so that the customer has a consistent experience

Contrast this with the sales processes most businesses use today. Many companies have a Web presence that describes their company. They might even have a Web store, but the connection between that store and operational systems is very loose, if it exists at all. Operational applications are probably visible to and utilized by, at most, 10 percent of a company’s employees. In the traditional way of doing business, companies usually work with your their suppliers and partners over telephones, although some exchange data electronically.

When a company moves from the traditional business processes toward the e-Business model, these processes and interactions change, becoming more efficient and effective. Oracle Sales Online provides a company with important tools that it needs to move away from the traditional sales model to become an e-Business.

Understanding Trading Community Architecture

Oracle Trading Community includes a database schema, api's, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together.

The Oracle Sales Online customer model is based on the Trading Community Architecture, also referred to as TCA. Trading Community Architecture is an architecture designed to support complex trading communities. The goal of TCA is to provide the foundation for Oracle Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and eBusiness applications, (i.e., the entire eBusiness Suite). To do this, TCA strives to model all relationships within a 'trading community'. For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers and business consumers. The appliance manufacturer not only wants to track relationships between itself and other entities within the trading community, it is also interested in relationships that other community members have with each other. The appliance manufacturer may not even have direct relationships with all the members of its trading community. But, it is important that the appliance manufacturer know about these entities and how they relate to others within the trading community.

Within Oracle Sales Online, all business entities are treated equally. The database stores information entered via Sales applications under three separate entities. Collectively these are called parties.

TCA Parties

The concept of parties enables the customer model to treat all business entities equally. This means that regardless of the type of customer (organizations, people, groups, or relationships), each is handled in the same way by the data model.

Because all business entities are treated equally, the customer model can easily handle B2B, B2C or mixed business models. Although the model tracks different attributes for people than for organizations (e.g., for people, date of birth, title and gender; and for organizations, SIC code, and fiscal year end), both people and organizations are parties and therefore stored in the same physical database table.

This means that the same sorts of business relationship which can be formed with an organization can be formed just as easily with a person.

TCA Party Types

Person

Use this party type to enter personal information for both consumers and contacts at organizations. Personal information includes home address and other contact information, personal interests, as well as quotes, orders and purchases which an individual makes as a consumer.

If your organization sells directly to consumers (B2C), then you would define them as parties of type Person.

Organization

An organization is a business entity. Use this party type to enter general information about the organization with which you are doing business, view leads, opportunities, quotes and orders for the organization (including any made by contacts at that organization).

Party Relationship

Use Party Relationship to link people to organizations, link organizations to organizations and to link people to people. In a B2B scenario where your organization does business with other organizations, you will use this party type to record the people you deal with at organizations (i.e., business contacts).

Party Relationships are parties in their own right and so addresses and phone numbers can be directly associated with this entity. For example, if John works for Oracle, we would have a Person party ‘John’, an Organization party ‘Oracle’ and a Party Relationship party ‘John, employee of Oracle’. John’s office phone number at Oracle, his job title and department are recorded against the ‘John, employee of Oracle’ Party Relationship entity. If John leaves Oracle, the Party Relationship record will show the end date.

A party relationship allows two parties to be linked, regardless of their party type. When two parties are connected through a party relationship, a relationship type is assigned which describes the relationship (‘competitor of’, ‘employee of’, ‘spouse of’, ‘VAR of’, and so on).

Business Relationships

You can establish business relationships between two individuals, such as “is the manager of”. You would typically make these links between business contacts, which are themselves Party Relationships.

Example: John, employee of Oracle, manager of William, employee of Oracle

Personal Relationships

Personal relationships are between two individuals, such as “is the father of” and “is the son of”. You can establish these relationships between consumers and business contacts (Person and Party Relationship party types).

Example: John, brother of Jane, (person-person) OR

John, employee of Oracle, brother of Jane, (party relationship-person) OR

John, employee of Oracle, brother of Jane, employee of Oracle (party relationship-party relationship)

Person-Organization Relationships

These are relationships between individuals and organizations, such as “is an employee of” or “purchasing manager for”. You can establish these relationships between Person and Organization parties.

Example: John employee of Oracle (person-organization)

You can also establish these relationships between business contacts and organizations:

Example: John, contact for ABC Inc, employee of Oracle (party relationship-organization)

Organization-Organization Relationships

These are relationships between different organizations, such as “is a subsidiary of.” You can establish these relationships for parties of type Organization.

Example: ABC Financial Services is a competitor of XYZ Finance Inc.

Understanding Sales Methodology

A Sales Methodology is a way to help sales people sell their products within a set of standard guidelines to assist the sales representative through the sales cycle. Oracle Sales Online provides this functionality through the creation of tasks in various stages of the sales cycle.

A methodology can be setup to create tasks as the sales stage changes, or all tasks when the opportunity is saved with a selected methodology. The tasks created are automatically assigned to the sales person creating the opportunity or changing the sales stage.

An opportunity can be created with or without a methodology. If the opportunity is saved without a methodology, one can be added at a later time. Once an opportunity is saved with a methodology, the methodology is displayed as a link and cannot be changed.

The methodology link displays the list of sales stages for the selected methodology. Click the sales stage link, within the methodology screen, will display the list of tasks for that sales stage.

At the top of the opportunity detail screen, a user can set the methodology progression / sales stages to be displayed in the form of a bubble train. This is helpful to know where you are in the opportunity sales cycle. The current sales stage is highlighted with the bubble filled in. Click any bubble, to display the list of tasks for the methodology.

Elements of a Sales Methodology

- Creates standard guidelines to assist in the sales cycle
- Can be created to generate a set of pre-defined tasks
- Generates new tasks when the opportunity is created or when the sales stage is changed
- Methodology cannot be changed once an opportunity is created
- Methodology progression can be displayed at the top of the opportunity detail screen
- Methodologies are built by the administrator using the setup screens

1.2 Oracle Sales Online Key Features

Oracle Sales Online includes the following features:

- Customer and Contact Management
- Opportunity Management
- Lead Management
- Personal Productivity
- Personalization
- Self Service Administration
- Information Out (Analytics)

- Forecast Management
- Quote and Order Management

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.

Also includes:

- Organization, person, and relationship profiles
- Global address formatting
- Contact restrictions
- AR account management
- Interaction histories
- Management of complex relationships
- 360 degree views of customers
- Contact list generation

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.

Also includes:

- Tracking of deal size, sales stage, win percentage, and projected closing date
- Tracking of obstacles, competitors, and decision factors
- Support for sales methods
- Sharing of opportunities across sales channels
- Pipeline management

- Generation of new quotes from opportunities
- Win/loss analysis

Lead Management

Salespeople are able to create their own leads, have leads routed to them from other reps or have leads assigned to them directly using the lead import feature and territory manager. Salespeople are able to manage their leads by reassigning, qualifying and ranking their leads. Users will also be able to link leads to existing opportunities or convert a lead to a new opportunity.

Also includes:

- Auto assignment via flexible territories
- Automatic lead qualification and ranking
- Lead import facility
- Sharing of leads within sales teams
- Conversion of leads to opportunities

Personal Productivity

- Scheduling and calendar features
- Quick and expanded searches
- In box indicators of changed or new data elements
- Collateral fulfillment via email or fax
- Territory look up tool to find sales reps given territory properties

Personalization

Oracle Sales Online provides extended capability around descriptive flexfields to include context sensitive and dependent types. The ability to perform advanced searches on descriptive flexfields is also supported. Users are able to sort columns by clicking the column header.

Also includes:

- Ability to personalize tables across applications to view only relevant information
- Ability to specify a default tab or subtab

- Saved searches for easy access to data
- "My reports"
- Configurable home page

Self Service Administration

This release provides administrators with the tools necessary to perform system setups and maintenance using the HTML self service user interface.

Also includes:

- Broadcast messages on the home page
- Configurable menus
- Maintenance of sales resources
- Setup tools for useful links on home page

Information Out (Analytics)

- Bins, charts, and reports displayed on the home page
- Sales metrics for managers and executives available on home page bins
- Win/loss analysis (win/loss ratio by competitors product categories)
- Pipeline analysis (open and won opportunities by channel/campaign)
- Forecast analysis (forecast submissions by subordinates)
- Forecast reports (forecast progression to track how forecast has changed within a period)
- Top customer chart (revenue per customer)

Forecast Management

- Global forecasting
- Forecasting at geographic, product, and opportunity levels
- Auto submission of forecast worksheets
- Support for forecasts for overlay organizations
- Ability to submit forecasts for multiple periods

Quote and Order Management

- Ability to create and to view quotes and orders
- Validation, via iPayment, of credit card purchases
- Global availability-to-promise (ATP) check
- Calculation of sales taxes, discounts, and freight rates
- Exchanges
- Manual price adjustment and tax exemption
- Multiple product configurations
- Ability to leverage up-sell and cross-sell opportunities

1.3 Oracle Sales Online Integrations

Oracle Sales Online's functionality is enhanced through integrating with other applications. Here is a summary of these integrations:

Incentive Compensation: Performance Measures in Oracle Sales Online

Integration with Oracle Incentive Compensation enables Oracle Sales Online to align sales force behavior with business goals and imperatives. Sales representatives can view their compensation summary and break down their commissions by deal, product line, period, adjustments, and transactions. Salespeople can also estimate their commissions with Income Planner by using their submitted forecast as the baseline.

Sales Force Planning: Quota Planning and Distribution

Salespeople can approve their compensation plans online through integration with Sales Force Planning. Sales managers and executives can plan and distribute quotas to different sales groups and/or professionals through an HTML interface.

Partner Relationship Management/Partners Online

You can now take advantage of the expanded definition of partner relationships and integration with Partner Relationship Management/Partners Online for indirect selling channels, such as value added resellers (VARs) and value added distributors (VADs). Partners have restricted access to a central repository of customer data.

Territory Management

Oracle Sales Online takes advantage of the enhanced Territory Management module to assign accounts (customers), opportunities and leads to salespeople. Administrators define flexible territories where qualifiers can be defined using any attribute related to the customers, leads, and/or opportunities.

Resource Management

Forecasting must roll up a Sales Hierarchy for management to review and adjust subordinate's forecast values. The Resource manager allows for multiple hierarchies for multiple lines of business, and provides for independent resource teams.

Fulfillment

Users can send product literature, proposals, welcome letters, and other electronically stored documents to single contacts or to multiple people through integration with 1-to-1 Fulfillment.

Marketing

The marketing integration provides a critical link in the flow from Campaign to Cash, and provides the information to analyze the success of company campaigns.

Business Intelligence System

Oracle Sales Intelligence, part of the Business Intelligence family of products, provides an entire framework for setting sales goals, measuring sales performance against targets, enabling root-cause analysis, and collaborating directly with sales people in a timely manner. Sales Intelligence provides fast answers to hard questions, enabling all sales staff, from analysts and managers to the vice president, to make cost-effective decisions. Armed with extensive sales information, a company can expand their business by attracting and retaining the most desirable customers. Sales Intelligence provides intelligence reports and analysis workbooks and includes search engines that direct users to the appropriate reports and workbooks.

1.3.1 ERP Applications

The following ERP applications integrate with Oracle Sales Online.

- Oracle Service
- Oracle Receivables
- Oracle Order Management

- Oracle Inventory
- Oracle Advanced Pricing
- Oracle Shipping

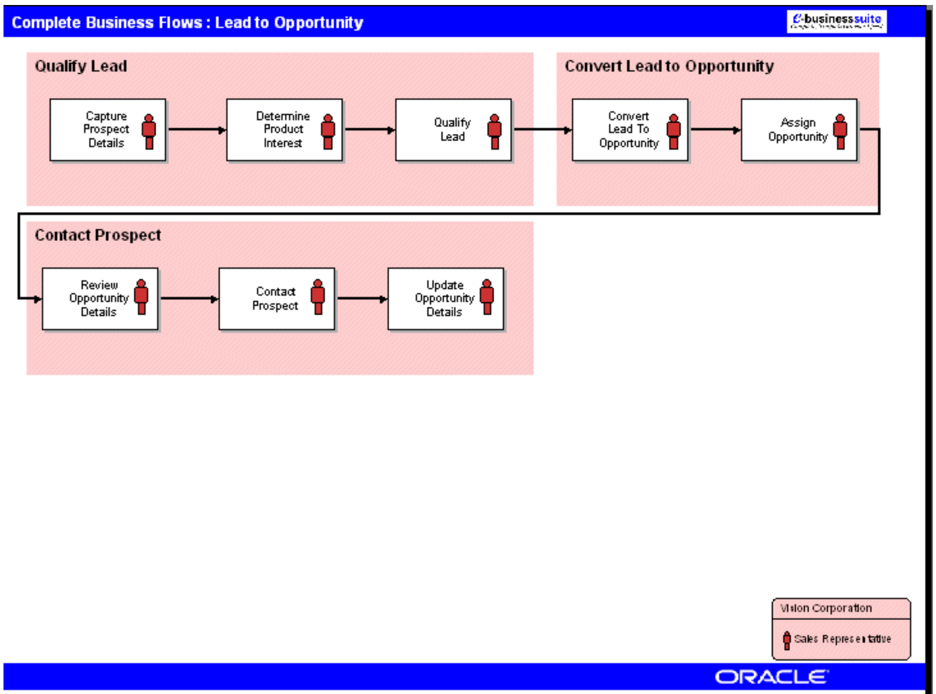
1.3.2 CRM Applications

The following CRM applications integrate with Oracle Sales Online.

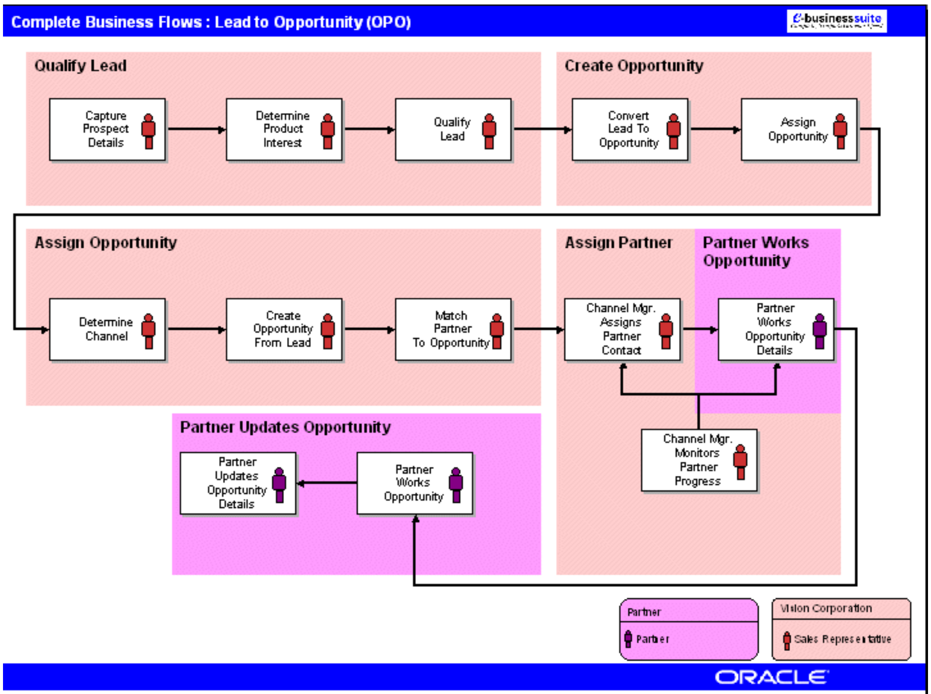
- Oracle TeleSales
- Oracle Incentive Compensation
- Oracle Partners Online
- Oracle Marketing
- Oracle Collections
- Oracle Order Capture
- Oracle iStore
- Oracle Configurator
- Oracle Business Intelligence
- Oracle Field Sales Laptop / Palm
- Oracle Sales Online Wireless
- Oracle Installed Base

1.4 Process Flow for Lead to Opportunity

This lead to opportunity process flow shows the business flow as the sales representative qualifies the lead and converts it to an opportunity.

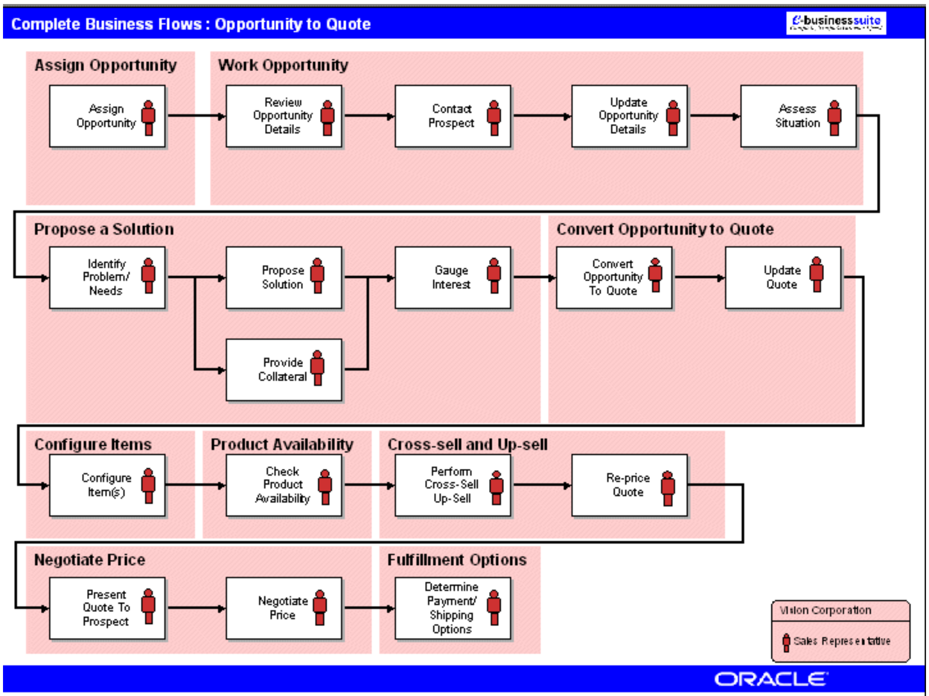


This process flow shows a qualified lead being turned into an opportunity. The opportunity is then assigned to a sales rep.



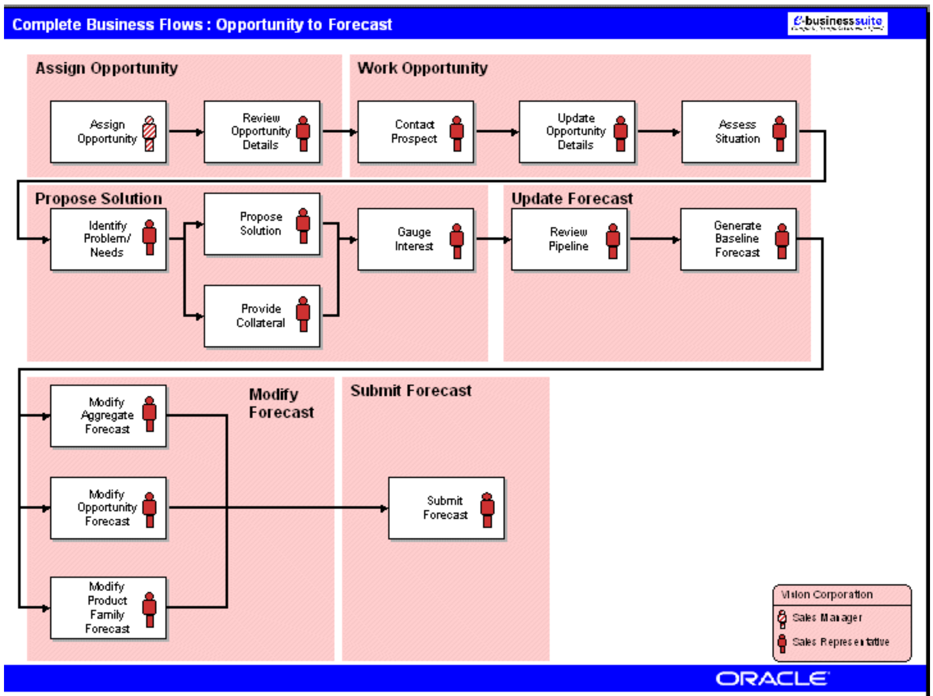
1.5 Process Flow for Opportunity to Quote

The following chart shows the process flow for opportunity to quote. The opportunity is assigned to a sales representative who works the opportunity through its’ conversion to a quote.



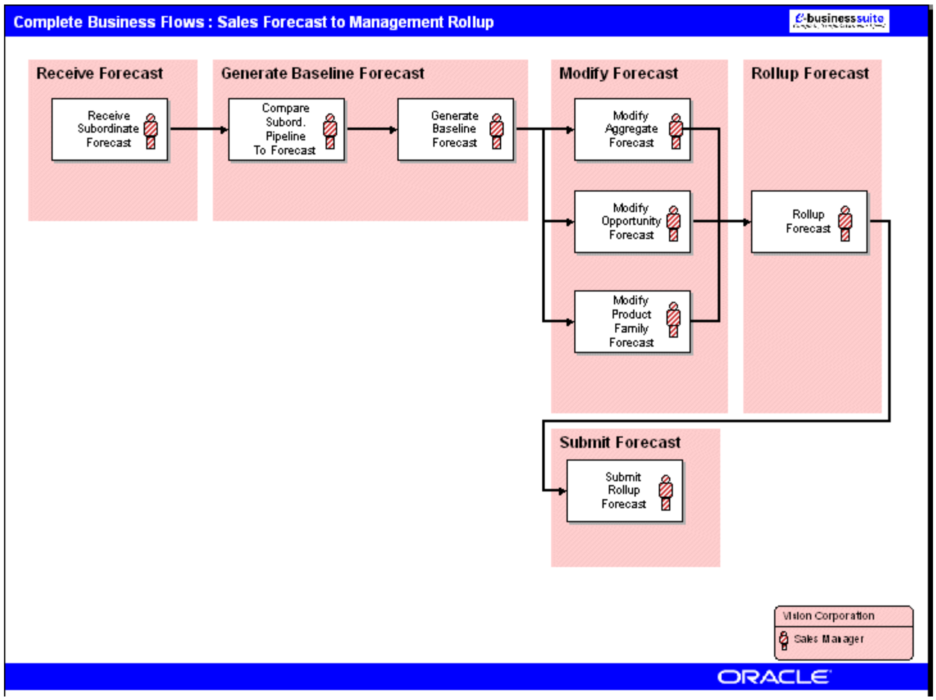
1.6 Process Flow for Opportunity to Forecast

This process flow shows the opportunity being worked by the sales representative through the phase where the sales representative includes the opportunity in their forecast. The forecast is submitted for the sales manager to review.



1.7 Process Flow for Sales Forecast to Management Rollup

This process flow shows the sales forecast to management rollup.



1.8 What's New

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult Metalink for relevant product patches and documentation.

The following features are new to Oracle Sales Online.

- Opportunity History Tracking
- Copy Opportunity
- Contact Interest
- Forecast Enhancements
- Event Registration
- Address Validation
- Flexible Data Security

Opportunity History Tracking

The following reports complement the application's ability to view the audit trail of opportunity updates over a lifecycle.

- Opportunity Aging Report: This report provides sales representatives, sales managers, and sales executives the ability to view a list of opportunities and compare aging trends based on the close date of the opportunity.
- Opportunity Aging by Status Report: This report provides sales representatives and sales managers the ability to view a list of opportunities and compare aging trends based on the statuses that the opportunity has been through during the sales cycle.

Copy Opportunity

Before you make a copy of an existing opportunity, you can name the new opportunity.

Contact Interest

You can keep track of the product interests associated with your contacts. The System Administrator sets up the interest types (products) and maps these interest types to people, leads, or opportunities. For example, the System Administrator sets up an interest type called "Desktop" which can be used for people, leads, or opportunities. When a contact is created, the record can indicate that the contact is interested in computers, specifically desktops.

Forecast Enhancements

The application provides a flexible way to generate opportunity level forecasts. The current opportunity worksheet provides the ability to forecast on all opportunities. The new opportunity worksheet will allow users to decide which opportunities they want to forecast individually and which opportunities they want to provide an aggregate forecast. To achieve this the opportunity worksheet will have parameters allowing each user to specify criteria for aggregating opportunities. The parameters available to the users are:

- Sales Channel
- Sales Stage
- Total forecastable amount <= a certain amount based on the forecast currency
- All opportunities that fall within a particular win probability range
- Flexfields which are available on the opportunity

Event Registration

Sales representatives are able to register contacts for marketing events, review the event roster, and cancel event enrollments directly through the application.

Address Validation

When entering or updating customer and contact addresses, the application is able to validate the address as indicated by a profile option. Validation rules are set up in tax locations, provided by Oracle Accounts Receivables application.

Reference: For information on setting up tax locations, see the *Oracle Accounts Receivable User Guide* and the *Oracle Accounts Receivable Implementation Guide*

Flexible Data Security

Flexible Data Security within Sales Online will provide a framework for administrators to implement different variations of security around the different sales components like customers, contacts, opportunities and leads. Administrators will have the ability to implement their own rules that can extend the product security implementation or override it without having to customize the product. These changes will remain consistent over upgrades.

1.9 What's Obsolete

The following profiles in Oracle Sales Online are obsolete:

- OSO: Opportunity Worksheet Threshold Amount
- OTS: Enable Address Validation (replaced by OS: Enable Address Validation)
- 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:

- Opportunity Exchange-Get Opportunities
- Opportunity Exchange-Put Opportunities
- Refresh Materialized View for Forecast Reports

2

Overview of Using Oracle Sales Online

This chapter provides an overview of the administration section and a summary of the tabs that are covered in more detail in the chapters that follow.

- Section 2.1, "Accessing Oracle Sales Online Administration"
- Section 2.2, "Summary of Oracle Sales Online Tasks"

2.1 Accessing Oracle Sales Online Administration

The Oracle Sales Online Administration tab consists of the following subtabs: General, Sales, Leads, and Resources. Accessing these tabs as an Oracle Sales Administrator, you have access to edit information that influences the way the application works.

Prerequisites

None

Login

Use your HTML login jtflogin.jsp page to log in to Self Service Administration.

Responsibility

Sales Online Administrator

Steps

1. Select the Administration tab.
2. Select from the Sales related Administration options:

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

- Section 14.2.1, "Globalization"

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

- Section 14.3.1, "Menu Administration"
- Section 14.3.6, "Home Page"
- Section 14.3.10, "Sales Category"
- Section 14.3.15, "Call Center"
- Section 14.3.16, "Opportunity"
- Section 14.3.21, "Forecast"
- Section 14.3.25, "Accesses"

From the Resources subtab, you can manage Employees, Groups, and Roles. Refer to the *Oracle CRM Foundation Application Implementation Guide and Oracle CRM Foundation Application User Guide*.

From the Leads subtab, you can manage Setups, Processing Rules, and Operational Reports. For details about Leads setups, please refer to the *Oracle Leads Management Implementation and Administration Guide*.

See Also

For details about Marketing setups, please refer to the *Oracle Marketing Implementation Guide.*

2.2 Summary of Oracle Sales Online Tasks

This section outlines the chapters included in this document. Each chapter begins with a summary list of the tasks covered in the chapter.

It is important for a user to understand that this application and access to the functionality in the application is driven by the security setups applied during the implementation process. For this reason, even if the topic is covered in the documentation, if you do not have access to the function, you will not be able to perform the task as outlined. For example, if a user with a sales representative role is logged into the application, his / her access to create, view, and update information for opportunities can vary based on the security implementation.

For more information about security, please refer to the *Oracle Sales Online Implementation Guide*.

Use Oracle Sales Online to perform tasks related to the following topics:

- Chapter 3, "Getting Started"
- Chapter 4, "Your Home Page"
- Chapter 5, "Calendar Tab"
- Chapter 6, "Lead Tab"
- Chapter 7, "Opportunity Tab"
- Chapter 8, "Quote Tab"
- Chapter 9, "Forecast Tab"
- Chapter 10, "Customer Tab"
- Chapter 11, "Partner Tab"
- Chapter 12, "Compensation Tab"
- Chapter 13, "Fulfillment Tab"
- Chapter 14, "Administration Tab"
- Chapter 15, "Mobile Tab"

Part II

User Procedures

This part contains the following chapters:

3

Getting Started

Sections in this chapter include:

3.1 Overview of Getting Started

This topic group covers the personalization and preferences that you, as a user, can set while using Oracle Sales Online. It is an important step in using the application since many of the features and functions are governed by profiles and preferences. For example, your home page can be fully customized to view only the sales data that you determine. For this reason, please take the time to thoroughly review this section.

For information on system level profile options, please refer to the *Oracle Sales Online Implementation Guide*.

3.2 Getting Started

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

See the following topics:

- Section 3.3, "Managing Account Settings"
- Section 3.4, "Personalization"
- Section 3.5, "Setting Profiles"

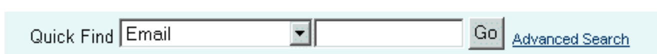
3.2.1 Using Quick Find or Advanced Search

You can search for information in Oracle Sales Online using either Quick Find or Advanced Search.

3.2.2 Quick Find

Quick Find is a single field search. Use Quick Find for more basic searches, such as to search for an opportunity by name.

This is a screenshot of the quick find feature. The drop down lists all the available fields by which you can search.



To search using **Quick Find**:

1. Choose the item for which you are searching from the drop down list.

   This function provides a simple lookup using the name of the following types of data:

   - Email: matches the email address for organizations, people and contacts
   - Opportunity: matches on the opportunity name
   - Owner: matches on the opportunity owner
   - Organization: matches on the organization name
   - Person: matches on the person’s last name

- Contact: matches on the person's last name and they are defined as a contact
- Lead: matches on the lead name
- Company Research: links to the Hoover's Inc., company research database
- Appointment: matches on the appointment name
- Task: matches on the task name
- Notes: matches on the note name

You can use the wildcard character '%' (percent sign) to replace one or more characters in the search string. However, the '%' cannot be the first character in the search string.

2. Click **Go**.

Results

Quick find displays the items you requested in a list. If you have access to those items, you can click the link to view details. Those without access to update a particular object may receive a message such as "Warning: You do not have privileges to update information for this opportunity."

Since profile options control the level of access to customer, leads, and opportunities, it is important to understand that the system administrator has already established your level of access through these profiles. Here is an overview to help understand these profiles and their effect on quick find. When the profile for customers is limited to "Sales Team" access, you can find the organization, person, or contact, but not view the detail screen. When the profile for lead and opportunity is limited to "Sales Team" access, you cannot find any lead or opportunity unless you are on the sales team. When the profiles are set to "Full" access, you can find, view details, and update objects.

3.2.3 Advanced Search

Advanced Search is a parameter driven detailed search related to the active tab. For this search, you have the option of saving the search criteria and using it as the default summary screen for the selected tab. In addition to a wide variety of parameters, you can select the columns that you want to display in the search results and select from three levels of sort criteria.

Prerequisties

None

Example

You are trying to locate a person or contact in Oracle Sales Online and only have the person's telephone number. Whereas Quick Find is limited to person, organization, email, etc., Advanced Search allows you to customize your search to use the phone number as a search criteria.

You can search by phone number for person using the following navigation:

1. Customer Tab > Person > Advanced Search
2. Enter the person’s phone number.
3. Click **Search**.

Navigation

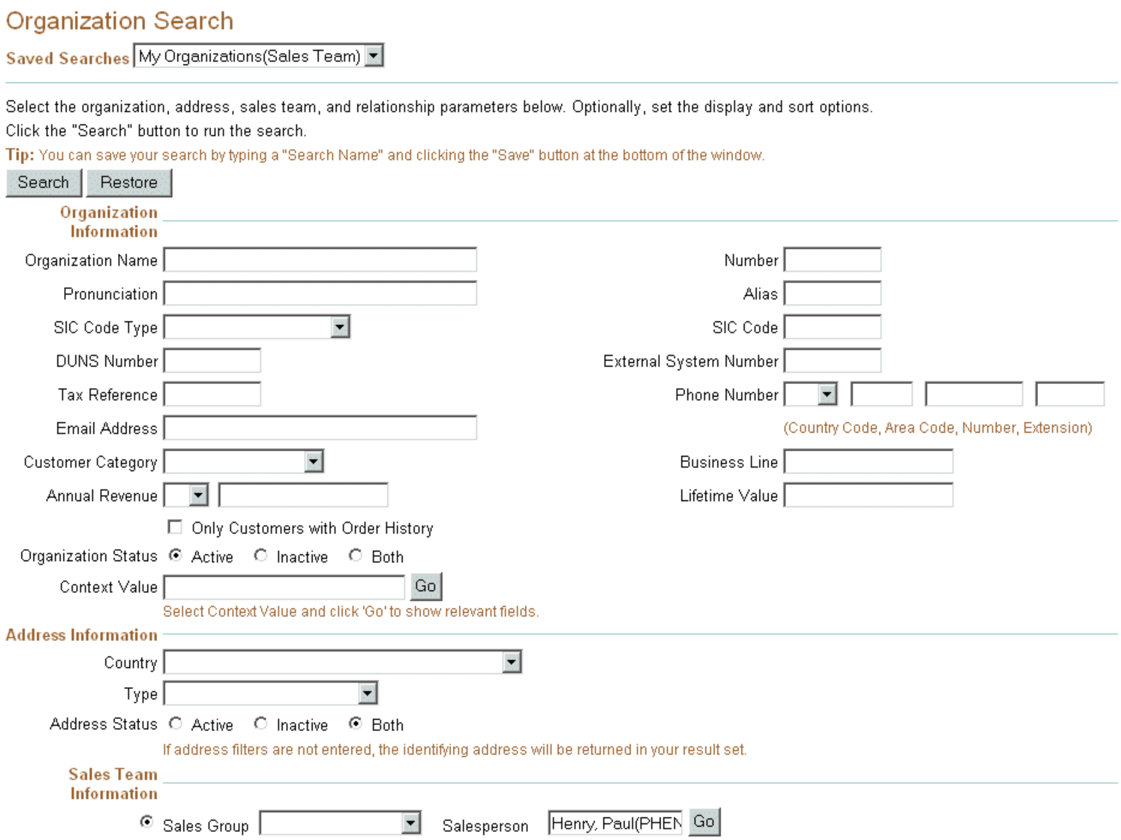
Click Advanced Search

Steps

To search using **Advanced Search**:

1. Click the **Advanced Search** link or the Personalize button.

   The Advanced Search page, related to the tab you are viewing, opens.



Advanced Searches are available from the following tabs: Customer, Partner, Lead, and Opportunity.

2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

When saving a search, the name must be different than the seeded searches that are provided with the application. Once a search is saved, the name will become an option for the object’s summary page.

3.2.4 Your Home Page

The Home tab consists of the Home, Tools, Marketing, News, Encyclopedia, and Reports subtabs. Your home page displays bins, reports, charts, and graphs based on the bins that are accessible to your responsibility level. You can also view the details of your bins by clicking the links in each bin.

For information about responsibilities, refer to the "Setting Up Users, Security, and Reporting Hierarchy" in the *Oracle Sales Online Implementation Guide*.

The following table briefly describes the subtabs available on the Home tab:

Subtab	Description	Links or Features
Home	You can view different summary reports and charts from your home page by indicating your preferences through Administration > Home Page > Home Page Bins.	Bins, Charts, Graphs for viewing. Edit bin parameters using the Edit link.
Tools	You can use the External tools, such as Travel Reservations, and the Internal Tools, such as Territory Lookup, Resource Lookup, and Group Lookup from this subtab.	Travel Reservations, Territory Lookup, Resource Lookup, and Group Lookup
Marketing	Displays marketing information	Marketing
News	Display news information from the Marketing Encyclopedia System, such as world, industry, internal, and competitor news from the home page. Indicate your preferences through Profiles > Homepage.	MES
Encyclopedia	Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories. For detailed information on using Marketing Encyclopedia System, please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures Guide*.	Oracle Sales Online’s Encyclopedia subtab includes four subtabs; Category, My Channels, Publish, and Administration.
Reports	Lists all available reports and charts for Leads, Opportunities, Forecasts, and Customers. Also lists reports saved in "My Reports".	Click the report hyperlink to run the report. Click the Edit icon to edit report parameters.

Note: To refresh the data in Lead and Opportunity bins and drill down reports, you must run the following concurrent programs whenever there is a change in data:

Initial Build of Opportunity and Lead Bins

Initial Load for Lead Reports

Initial Load for Opportunities Reports

For information on running concurrent programs, please refer to the *Oracle Sales Online Implementation Guide.*

See Also

Section 4.1.1, "Setting Up Bins, Charts, and Reports"

Section 4.1.3, "Editing a Bin, Chart, Report, or Graph"

Section 4.1.5, "Internal Tools"

Section 4.1.6, "Using Territory Lookup"

Section 4.1.7, "Using Event Lookup"

Section 4.1.8, "External Tools"

3.3 Managing Account Settings

Use the Account Settings section to manage the following information:

- Section 3.3.1, "Changing Your Password"
- Section 3.3.2, "Updating Personal Information"

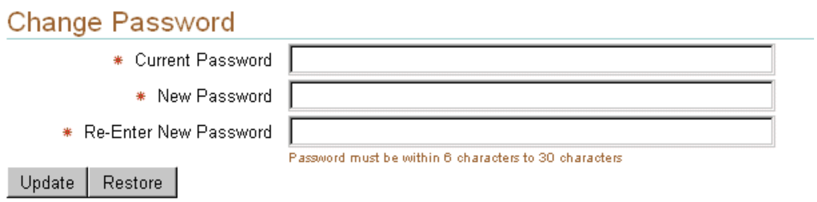
Reference

For more detailed information about these settings, please refer to the *Oracle CRM Foundation Application User Guide or Oracle CRM Foundation Application Implementation Guide.*

3.3.1 Changing Your Password

Navigation

Profile > Account Setting > Change Password



Steps

1. Enter your current password.
2. Enter your new password.

   Your password must be at least six characters long. You can use numbers or letters.
3. Re-enter your new password.
4. Click **Update**.

Note: You cannot update your user name.

Reference

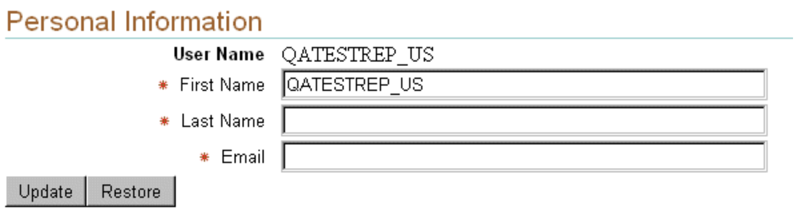
For more detailed information, please refer to the *Oracle CRM Foundation Application User Guide or Oracle CRM Foundation Application Implementation Guide.*

3.3.2 Updating Personal Information

This information affects other applications in the Sales suite.

Navigation

Profile > Account Setting > Personal Information



Steps

1. Enter your first name.
2. Enter your last name.
3. Enter your email address.
4. Click **Update**.

Reference

For more detailed information, please refer to the *Oracle CRM Foundation Application User Guide or Oracle CRM Foundation Application Implementation Guide*.

3.4 Personalization

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

The following preferences can be set or changed:

- Section 3.4.1, "Navigation Preferences"
- Section 3.4.2, "Display Preferences"
- Section 3.4.3, "Quick Menu"

You must click **Update** after changing information in each page.

3.4.1 Navigation Preferences

Navigation

Profile > Personalization > Navigation Preferences

Switching Current Responsibility

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

Setting Default Responsibility

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

3.4.2 Display Preferences

Navigation

Profile > Personalization > Display Preferences

Language

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

User Currency

This is the transaction currency used when creating leads and opportunities. For existing leads or opportunities, this also controls the user currency displayed on the detail screens. If the user currency is different than the transaction currency, the transaction currency is converted and displayed in the User Amount field.

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

Date Format

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

Display Style

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

Display Rows per Page

This is the number of rows of data to display in a summary screen before selecting another page of data.

Display Blank Rows per Table

This is the number of blank lines to display in tables allowing data to be entered.

Search Display

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

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

3.4.3 Quick Menu

This feature is not currently available in Oracle Sales Online.

Navigation

Profile > Personalization > Quick Menu

3.5 Setting Profiles

User profiles are a collection of changeable options that affect the application. A value is established for each option in a user's profile when the user logs on or changes responsibility. The application provides these options so that you, as a user, can alter the behavior of the application to suit your own preferences.

User profile options can be set at one or more of four levels: Site, Application, Responsibility, and User. The system administrator can set default option values at any of these levels.

Oracle Applications treat user profile levels as a hierarchy, where User is the highest level of the hierarchy, followed by Responsibility, Application, and at the lowest level, Site. Higher level option values override lower level option values.

- **User Level**:

  User is the highest profile level and is immediately above Responsibility. User level option values affect the way applications run for a given application user.

- **Responsibility Level**:

  Responsibility is the profile level immediately above Application. Responsibility level option values affect the way applications run for all users of a given responsibility.

- **Application Level**:

  Application is the profile level immediately above Site. Application level option values affect the way a given application runs.

- **Site Level**:

  Site is the lowest profile level. Site level option values affect the way all applications run at a given installation site.

Navigation

Profiles > Sales Online

Profile Categories

This section covers the following profile categories:

- Section 3.5.1, "Setting General Profiles"
- Section 3.5.2, "Setting Home Page Profiles"
- Section 3.5.3, "Setting Lead Profiles"

- Section 3.5.4, "Setting Opportunity Profiles"
- Section 3.5.5, "Setting Forecast Profiles"
- Section 3.5.6, "Setting Customer Profiles"
- Section 3.5.7, "Setting Compensation Profiles"
- Section 3.5.8, "Setting Contact List Profiles"

Note

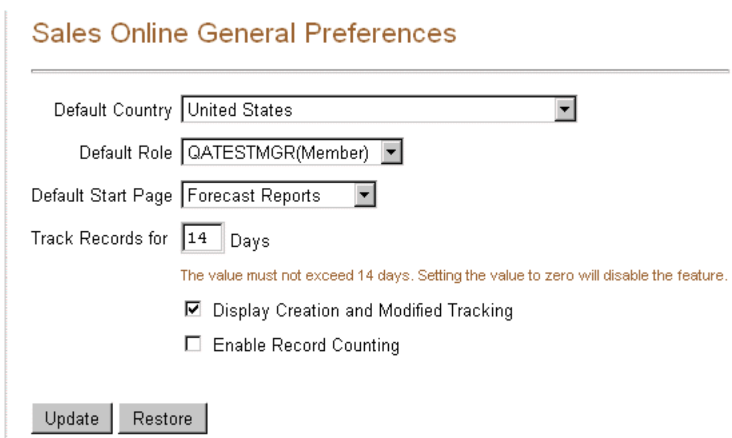
If you set up a profile and that profile becomes obsolete at a later time, a warning message will appear on the screen. The message asks you to select a valid option for the profile from the available options.

3.5.1 Setting General Profiles

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

Navigation

Profiles > Sales Online > General



Steps

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

Default Role: This is the role assigned through the Resource Manager. It also indicates whether your role is a sales group member, manager or administrator. You may have one or many roles. This partially controls the opportunities you can view and the forecast data submitted. When you have multiple roles, it is important to recognize which one is your current role.

From the drop down list, choose which role you want as your default. If you have more than one role, the role you select here will appear as the default.

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

Track Records for 'N' Days: This controls the number of days to display the New and Modified icons next to any record that has been changed by another user or is new on a summary screen. Enter a number of days for which you want to track records. The value must not exceed 14 days. Setting the value to zero will disable the feature.

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

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

Enable Instruction Text: Select the checkbox to enable instruction text throughout the application. Leaving the box unselected means that instruction text will not be used for the user.

Click **Update** to save your changes.

3.5.2 Setting Home Page Profiles

The home page can be customized to display a variety of data bins, charts, reports, and graphs. This data comes from the opportunities, customers, leads, and forecasting information in the application.

Home page preferences are categorized into four sections:

- Bin Preferences
- News Preferences
- Report Preferences

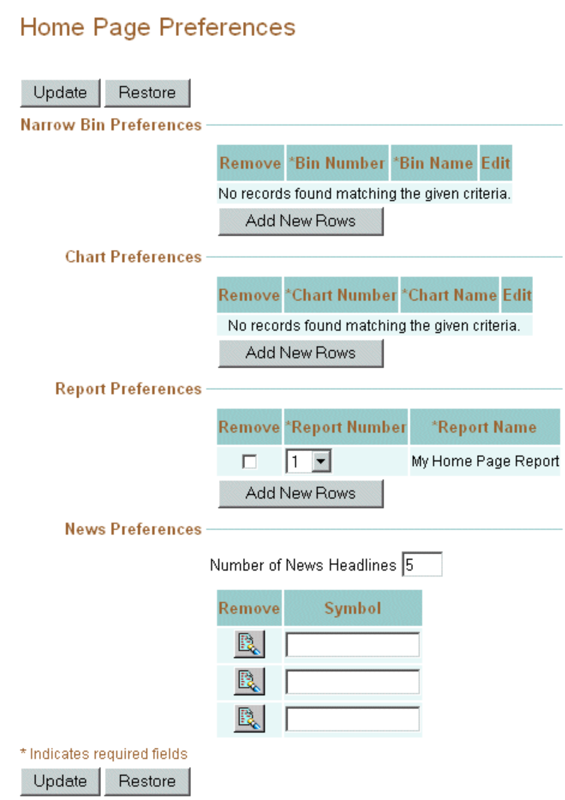
- Chart Preferences

Note

When you log inBefore setting any preferences, an introductory message about setting preferences on the home page appears on the page.

Navigation

Profiles > Sales Online > Home Page



Steps

Use the Add New Rows button to add items to bins, charts, and reports.

Narrow Bin Preferences: A small table of information for specific data types. Available Bins are: Top Performers, New Leads, Win Loss Ratio, My Favorites, Open Opportunities, Won Opportunities, My Forecast, Opportunity Status, System Counts, Corporate Open Opportunities, Corporate Won Opportunity and My Offered Opportunities.

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

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

Reference

See the *Oracle Sales Intelligence User Guide* and *Oracle Sales Intelligence Implementation Guide* for information about the System Counts bin.

Chart Preferences: You can select and configure the Charts of your choice from a drop down list to display on your personal Home Page.

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

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

Click **Update** to save your changes.

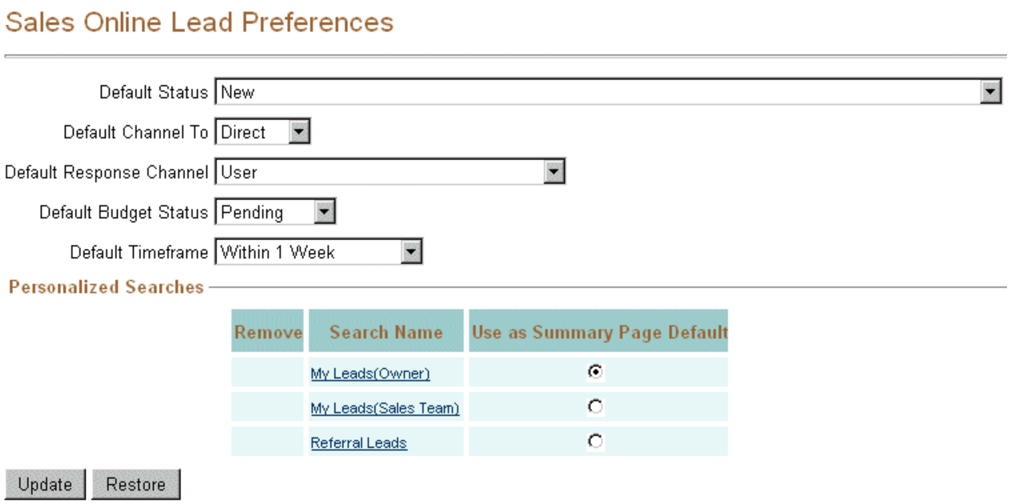
3.5.3 Setting Lead Profiles

Lead profiles affect user preferences for lead management.

Refer to the *Oracle Leads Managment Implementation and Administration Guide* for detailed information on using lead management.

Navigation

Profiles > Sales Online > Leads



Steps

From the Leads Preferences page, you can set your defaults for the following:

Default Status: Lead status is one measure of the progress of a lead. Select the default status that will be used when a lead is created.

Default Channel to: Channel refers to whether the lead will be direct or indirect (via partner). Select a default channel that will be used when a lead is created.

Default Response Channel: Response channel is how the lead is received e.g. via web, email, phone. Select a default response channel that will be used when a lead is created. Examples include mail, fax, or phone.

Default Budget Status: Budget status indicates the progress of the customer's budget e.g. is it pending or already approved. Select the default budget status for new leads.

Default Timeframe: Timeframe indicates when the lead is likely to close. Select the default time frame.

Personalized Searches: The list of saved searches created, including the pre-seeded searches. You can remove or delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

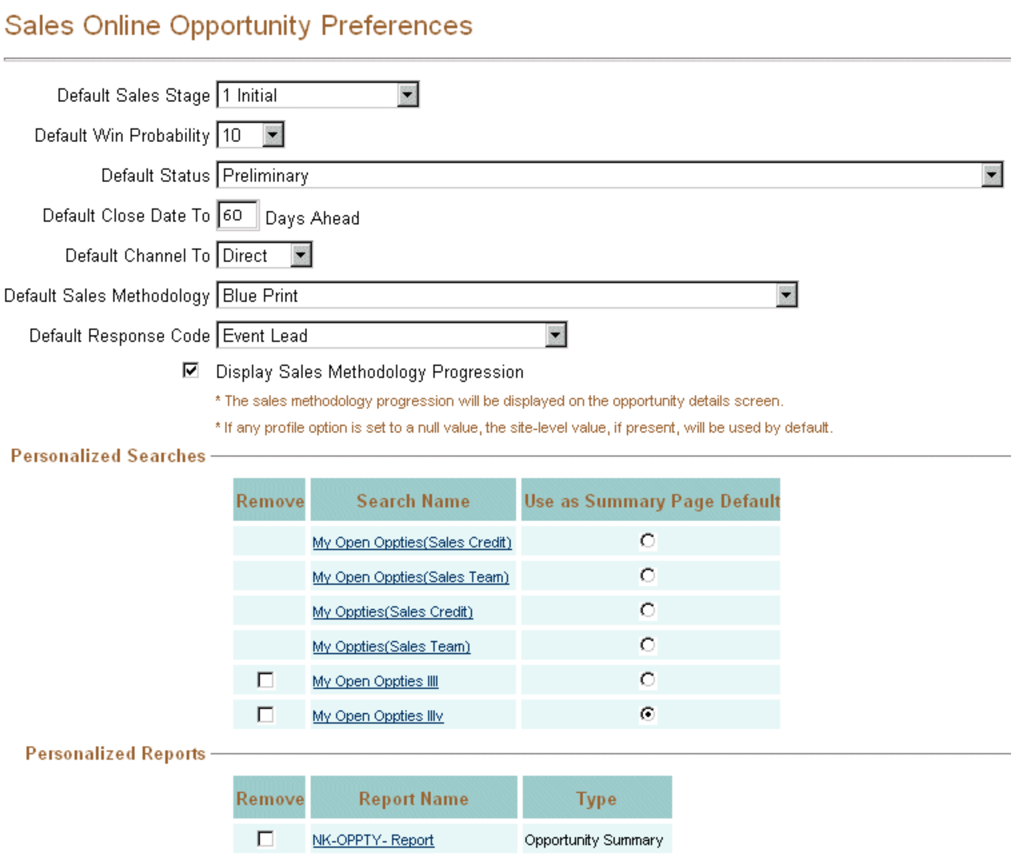
Click **Update** to save changes.

3.5.4 Setting Opportunity Profiles

This section covers the user profiles that affect the opportunity pages.

Navigation

Profiles > Sales Online > Opportunity



Steps

From the Opportunity Preferences page, you can set your defaults for the following:

Default Sales Stage: The stages used in a sales cycle. These can be linked to a specific methodology or generic. Choose from the drop down list.

Default Win Probability: The chance of winning the opportunity expressed as a percentage. This is used to calculate the standard forecast amount, also known as the weighted forecast. Choose from the drop down list.

Default Status: The current status of an opportunity, showing whether the deal is won, lost, open or dead. Choose from the drop down list.

Default Close Date to ’N’ Days Ahead: The default number of days in the future you plan to close opportunities. Enter the default number of days to plan you default close dates.

Default Channel To: The method of receiving an opportunity, usually direct or indirect. Choose either direct or indirect from the drop down list.

Default Sales Methodology: A predefined set of guidelines and tasks to assist sales people through the sales cycle. The methodology selected will automatically create a set of tasks assigned to the sales person creating/modifying the opportunity. Choose from the drop down list.

Default Response Code: Describes how the opportunity is received. Examples include via web, email, phone. Select a default response code from the drop down list.

Display Sales Methodology Progression: When checked, the sales methodology progression will be displayed as a bubble train on the opportunity detail screen.

Personalized Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page. Remove any non-seeded saved search by clicking the Remove check box.

Personalized Reports: Remove any saved reports by clicking the Remove check box. You can also display a saved report as your summary page default by selecting the Use as Summary Page Default check box.

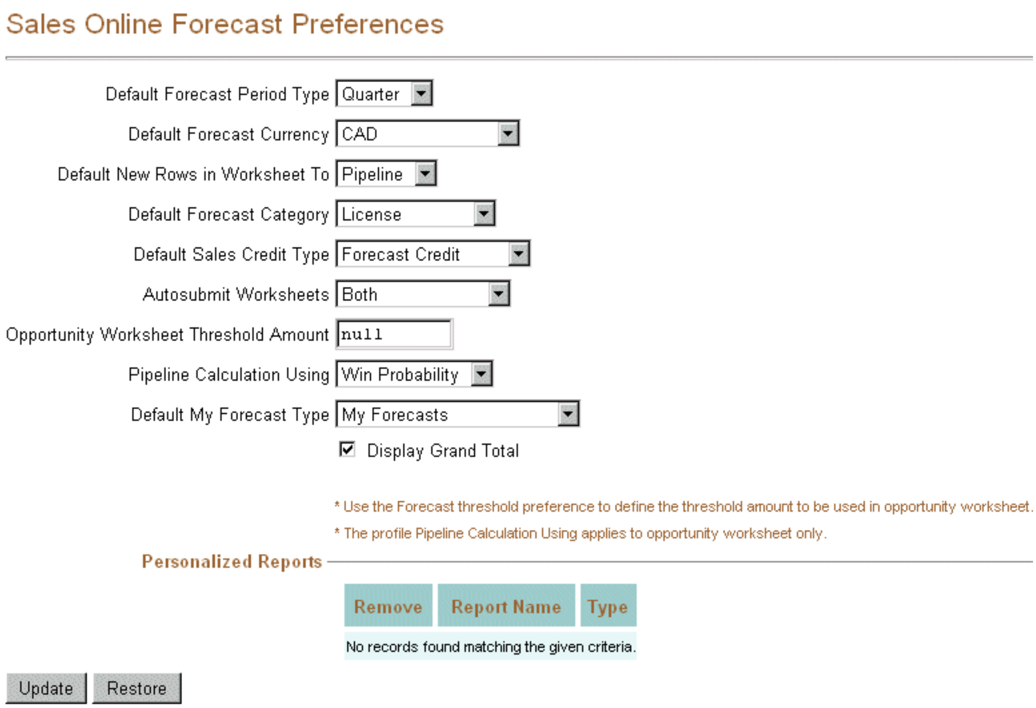
Click **Update** to save your changes.

3.5.5 Setting Forecast Profiles

Use the forecast profiles to set your user preferences for forecasting pages.

Navigation

Profiles > Sales Online > Forecasting



Steps

Default Forecast Period Type: This is the time frame used for the forecast: month, quarter, or year. Select from the drop down list.

Default Forecast Currency: The currency to be used when submitting the forecast. Select from the drop down list.

Default New Rows in Worksheet to: You have two options from which to select in this drop-down list, zero or pipeline. If you select zero, the Worst Case, Best Case, and Forecast fields defaults to zero. If you select pipeline, the Worst Case field displays Won Date values, the Forecast field displays the Weighted Pipeline values, and the Best Case field displays Pipeline amount.

Default Forecast Category: This category contains a list of product interest types to be included in the forecast. A separate forecast category could be configured for different lines of business.

Default Sales Credit Type: The sales credit type is the same credit type used in the sales credit screen of the opportunities. This can be a quota credit type or a non-quota credit type.

Autosubmit Worksheet: This option controls which worksheets are automatically created when using the Generate Forecast feature. Select Opportunity, Product Category, Both, or None.

Opportunity Worksheet Threshold Amount: Enter the amount to be used as a cut-off for displaying opportunities in the opportunity worksheet.

- A positive value in this field means threshold is turned on and will sum all rows with this amount or lower into one summary line.
- A null value assumes the feature is not being used and the application works as is, without a threshold set.
- A zero value is treated as a threshold value and will sum all rows with a zero or negative value into one summary line.
- Any opportunity with the amount less than the threshold amount will not be displayed.

Pipeline Calculation Using: This profile is related to the profile "Default New Rows in Worksheet To". If you set the Default New Rows in Worksheet To, equal to Pipeline, then this Pipeline Calculation Using profile will determine if you use System Defaults or Win Probability Based Defaults.

An example: If the profile "Default New Rows in Worksheet To" is set to "Pipeline", and Worst case equals total dollars from opportunities with a win probability >=80% then Forecast equals total dollars from opportunities with win probability >=60% and Best case equals total dollars from opportunities with win probability >=40%.

For all Open Opportunities with a win probability between 80-100:

- Best case = Opportunity amount
- Forecast = Opportunity amount
- Worst Case = Opportunity amount

Win probability 60-79:

- Best Case = Opportunity Amount
- Forecast = Opportunity Amount
- Worst case = 0

Win probability 40-59:

- Best case = Opportunity Amount
- Forecast = 0
- Worst case = 0

Win probability 0-39:

- Best case = 0
- Forecast = 0
- Worst case = 0

For an opportunity which is in won status, regardless of the win probability:

- Best case = Opportunity amount
- Forecast = Opportunity amount
- Worst case = Opportunity amount

Display Subordinate Current Pipeline Values: You can display subordinate current pipeline values on the summary page by selecting the check box. This will display a total of your subordinate's current pipeline values. Note, this option is only available to those with a manager role.

Default My Forecast Type: This profile controls what data is shown in "My Forecasts" bin on the home page. If set to "My Forecasts", the last "n" number of forecasts made by the user are shown along with the submitted data in the bin where "n" is a parameter for the bin. If set to "My Subordinate Forecasts", the forecasts made by the other members of the user's group, and forecasts for the immediate subordinate groups, for the selected period type are shown.

Display Grand Totals: To display grand totals on your Opportunity and Product Category worksheets.

Use the Aggregation table to Get the Pipeline on the Forecast Main Page: This feature can be used to increase the performance of the forecast page. Aggregate tables contain a snapshot of the pipeline values vs. accumulating current values from the opportunities. A message indicates 'Aggregation tables were refreshed on

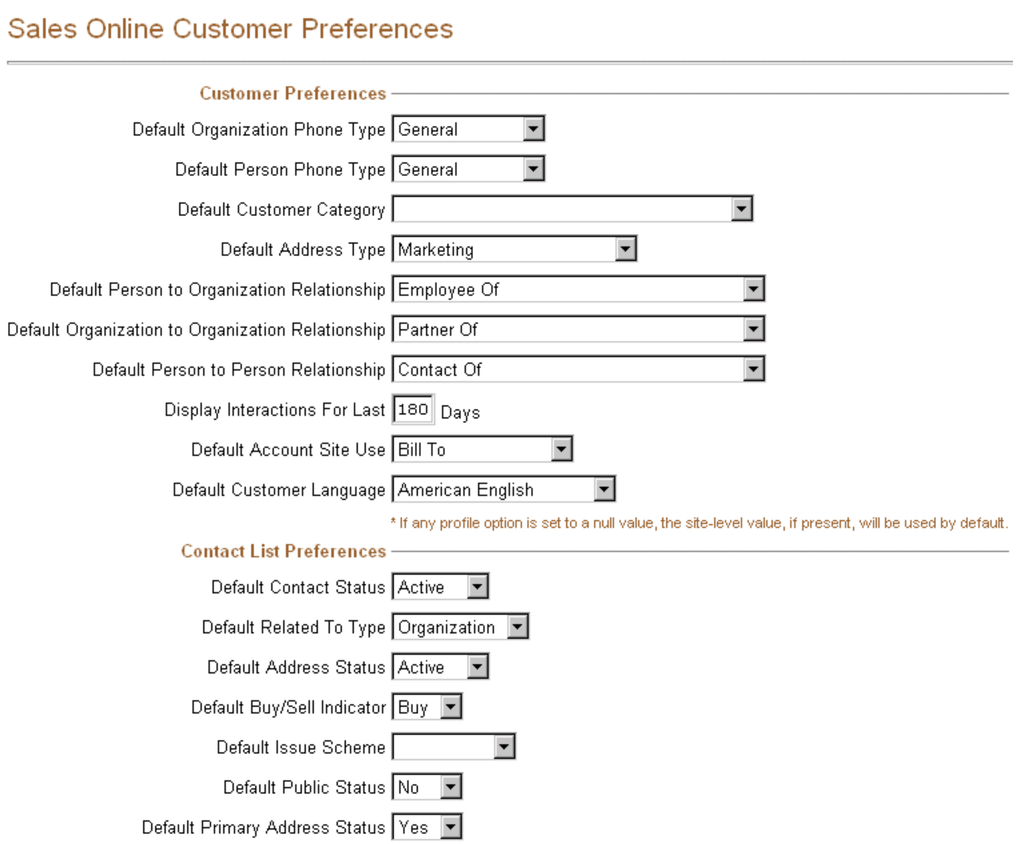
<date & time>'. Note, this option is only available to those with a manager role. If you select this option you will not be using real time data. Rather, the aggregated data is refreshed on a pre-determined schedule, set in the forecast profile options, based on business requirements. You will see a message indicating when the aggregation tables were last refreshed.

Click **Update** to save your changes.

3.5.6 Setting Customer Profiles

Navigation

Profiles > Sales Online > Customer



Steps

From the Customer Preferences page, you can set your default values for Customers (Organization and Person) and Contacts.

Default Organization Phone Type: This is the kind of phone for the organization, such as mobile, voice mail or general. Select from the drop down list.

Default Person Phone Type: This is the kind of phone for the organization, such as mobile, voice mail or general. Choose from the drop down list.

Default Customer Category: This is a way of grouping customers into standard categories. This is usually an company defined list of categories. Choose from the drop down list.

Default Address Type: This is the default address type that will be used when creating a new customer. Examples: Marketing, Billing, and Shipping. Select from the drop down list.

Default Person to Organization Relationship: This is the default person to organization relationship that will be used when creating a new relationship. The default relationship types include Contact of and Employee of. Choose from the drop down list.

Default Organization to Organization Relationship: Select from the drop-down list. Default relationship types include Competitor of and Partner of.

Default Person to Person Relationship: Choose from the drop down list. This is the default person relationship that will be used when creating a new relationship. These relationship types include Manager of, Spouse of, and Dependant of.

Display Interactions for Last "number" of Days: Enter a number to display interactions for n days in the past.

Default Account Site Use: Select from the drop down list. This is the default account site that will be used when creating a new customer. Values include Bill to, Ship to and Sold to.

Default Customer Language: Select from the drop down list. This is the default language of the customer.

Quick Find to return only active customers?: Select the check box to indicate if you want to return only active customers when using quick find.

Personalized Organizational Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

Personalized Contact Searches: The list of saved searches created, including the pre-seeded searches. You can remove / delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

Personalized Person Searches: The list of saved searches created, including the pre-seeded searches. You can remove / delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

The seeded searches, "My Organizations", "My People", and "My Person Relationships", cannot be removed because they are system wide defaults.

Click **Update** to save your changes.

For information on contact list preferences, see Section 3.5.8, "Setting Contact List Profiles".

3.5.7 Setting Compensation Profiles

From the Compensation Preferences page, you can set your default values for the Compensation tab.

For more information about compensation, please refer to the *Oracle Incentive Compensation User Guide*.

Navigation

Profiles > Sales Online > Compensation

Steps

Default Period: This is the time frame used for compensation information (e.g., month, quarter, year). Set your Default Period to use when running compensation reports by selecting from the drop down list.

Click **Update** to save your changes.

3.5.8 Setting Contact List Profiles

Navigation

Profiles > Sales Online > Contact List

Steps

The profiles for Contacts include:

Default Use Filters to Create List: If set to "No", contact lists will be created manually by default. If set to "Yes", contact lists will be created using filters by default. The default setting is "No".

Default Public Status: Select the default that will be used for the status of the contact list, if it is public or private. If "Yes", then the contact list will be public by default.

Default Contact Status: Select the default contact status that will be used when creating a contact list. The available values are "Active", "Inactive", or "Both". The default is "Active".

Default Related To Type: Select the default value that will be used for the "related to type" for contact lists. The available values are "Organization" or "Person". The default is "Organization".

Default Address Status: This profile is used to select a default address status to be used for contact lists. The available values are "Active", "Inactive", or "Both". The default is "Active".

Default Primary Address Status: Select the default that will be used for the primary address status. The available values are "Yes" or "No". The default is "Yes".

Start Day for Call Sheet Calendar: Set the starting day of the week that will be used for the weekly calendar. The default is "Monday".

Show User Tasks Only: This profile determines whether only tasks owned by the current user, or all tasks, regardless of the user, are displayed. If set to "Yes", will only display currently logged in user tasks. If set to "No", will display all tasks, regardless of user. The default is "No".

Create Tasks as Private: This profile determines whether tasks created are marked as private by default. If set to "Yes" the created tasks will be private. If set to "No", the tasks created will not be private. The default is "Yes".

Click **Update** to save your changes.

3.6 Overview of Managing Opportunities

This topic covers:

- Section 7.1, "Overview of the Opportunity Tab"
- Section 7.2, "Personalizing Opportunity Summary"
- Section 7.3, "Creating an Opportunity"
- Section 7.5, "Maintaining Opportunity Detail"
- Section 7.6, "Viewing Opportunity Line Subtotals"
- Section 7.7, "Searching for an Opportunity"
- Section 7.8, "Copying an Opportunity"
- Section 7.21, "Closing an Opportunity"
- Section 7.9, "Creating a Quote from an Opportunity"
- Section 7.18, "Tracking Win / Loss Information"
- Section 7.19, "Adding Multiple Purchase Items with the Same Product Category"
- Section 7.22, "Sales Credits"
- Section 7.24, "Notes"
- Section 7.11, "Sales Teams"
- Section 7.25, "Tasks"
- Section 7.26, "Attachments"
- Section 7.27, "Opportunity Reports"

3.6.1 Opportunity Overview

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

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

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

Overview of Sales Methodology

A Sales Methodology is a way to help sales people sell their products within a set of standard guidelines to assist the sales representative through the sales cycle. Oracle Sales Online provides this functionality through the creation of tasks in various stages of the sales cycle.

A methodology can be setup to create tasks as the sales stage changes, or all tasks when the opportunity is saved with a selected methodology. The tasks created are automatically assigned to the sales person creating the opportunity or changing the sales stage.

An opportunity can be created with or without a methodology. If the opportunity is saved without a methodology, one can be added at a later time. Once an opportunity is saved with a methodology, the methodology is displayed as a link and cannot be changed.

The methodology link displays the list of sales stages for the selected methodology. Click the sales stage link, within the methodology screen, will display the list of tasks for that sales stage.

At the top of the opportunity detail screen, the methodology progression / sales stages are displayed in the form of a bubble train. The current sales stage is highlighted with the bubble filled in. Click on any bubble, to display the list of tasks for the methodology.

Elements of a Sales Methodology

- Creates standard guidelines to assist in the sales cycle
- Can be created to generate a set of pre-defined tasks
- Generates new tasks when the opportunity is created or when the sales stage is changed
- Can generate a methodology of all tasks when the opportunity is created

- Methodology cannot be changed once an opportunity is created
- Methodology progression can be displayed at the top of the opportunity detail screen
- Methodologies are built by the administrator using the setup screens

3.7 Overview of Managing Forecasting

This topic covers:

- Section 9.1, "Overview of the Forecast Tab"
- Section 9.2, "Creating and Submitting Forecasts"
- Section 9.3, "Automatically Submitting Worksheets"
- Section 9.4, "Viewing Forecast History"
- Section 9.5, "Adding an Attachment"
- Section 9.6, "Adding a Note"
- Section 9.7, "Linking to Compensation"
- Section 9.8, "Opportunity Worksheet"
- Section 9.10, "Forecast Threshold Overview"
- Section 9.11, "Product Category Worksheet"
- Section 9.12, "Viewing Product Category History"
- Section 9.13, "Viewing Opportunity History"
- Section 9.14, "Quick Forecast"
- Section 9.15, "Forecast Reports"

3.7.1 Forecasting Overview

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

Overview of 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.

Worksheets

Opportunity Worksheet: Opportunity-level forecasting provides a tool for salespeople to create their own view, and their own commitment, of the opportunities with which they are working. Opportunity forecasting also gives salespeople the ability to review, adjust, and commit, to a forecast at a more granular level.

Product Category Worksheet: Forecasting at product category level gives salespeople an easy way to view their pipeline aggregated into product groupings.

Two Views of Forecast

The salesperson view is only their personal view of their forecast. They can create and update worksheets, and submit the forecast to their manager.

The manager view includes the salesperson view, plus a listing of all subordinate forecasts. The manager can drill down on each of the subordinate forecasts to view the details.

Overview of Multi-Currency

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 displayed in subordinates.

3.8 Overview of Managing Customers

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

This topic covers:

- Section 10.1, "Overview of the Customer Tab"
- Section 10.2, "Organization Subtab"
- Section 10.3, "Person Subtab"
- Section 10.4, "Contacts Subtab"
- Section 10.5, "Contact List Subtab"
- Section 10.6, "Customer Reports"

3.8.1 Managing Organizations Overview

An organization is a business entity. Use this party type to enter general information about the organization with which you are doing business, view leads, opportunities, quotes and orders for the organization (including any made by contacts at that organization).

3.8.2 Managing Persons Overview

Use this party type to enter personal information for both consumers and contacts at organizations. Personal information includes home address and other contact information, personal interests, as well as quotes, orders and purchases which an individual makes as a consumer.

If your organization sells directly to consumers (B2C), then you would define them as parties of type Person.

3.8.3 Managing Contacts Overview

Within the Customer tab you will find the Contact subtab.

Within Oracle Sales Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a contact is a person who has a relationship (usually an employee/employer relationship) with the organization (or another person) with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, i.e., an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet number, or tax identification number.

A simple example:

Person A is a Business to Consumer customer and an employee of Company B. This relationship (employee of) makes Person A a contact of Company B.

From this page, you can easily access organization to person relationships, also referred to as business contacts.

3.8.4 Managing Contact Lists Overview

Sales people can generate contact lists to assist them in planning their sales calls. Contact lists can be generated on the basis of parameters, including contact profiles, relationships, addresses, and classification information. For example, a sales person could generate a list of all Vice Presidents of Sales in the insurance industry in the Northeastern United States. Users can manually add contacts, remove contacts, and save a list. Lists can be designated private or public.

4

Your Home Page

Sections in this chapter include:

- Section 4.1, "Overview of the Home Page"
- Section 4.1.1, "Setting Up Bins, Charts, and Reports"
- Section 4.1.2, "Available Bins and Charts"
- Section 4.1.3, "Editing a Bin, Chart, Report, or Graph"
- Section 4.1.4, "Editing "My Favorites" Bin"
- Section 4.1.5, "Internal Tools"
- Section 4.1.6, "Using Territory Lookup"
- Section 4.1.7, "Using Event Lookup"
- Section 4.1.8, "External Tools"

4.1 Overview of the Home Page

The Home Page is an important component of Oracle Sales Online. You can personalize this page to view bins, charts, and reports of important sales data. You can view and customize these charts to your preferences based on the bins that are accessible to your responsibility level. You can also view the details of your bins by clicking the links in each bin.

The Home tab consists of Home, Tools, Marketing, News, Encyclopedia, Resources, and Reports subtabs. The following table briefly describes each subtab.

Subtab	Description	Links or Features
Home	The Home subtab is a central location that provides information about all of the sales objects (leads, opportunities, forecasts, and customers) in the form of reports, bins, and charts. If you are a System Administrator, the navigation is Administration > Sales > Home Page > Home Page Bins. If you are a user, the navigation is Profile > Sales Online > Home Page.	Bins, Charts, Graphs for viewing. Edit bin parameters using the Edit link.
Tools	Oracle Sales Online has the ability to provide links to external sites (HTML and jsp only) as well as ERP applications. You may only call self-service functions or functions which call HTML or jsp pages.	The Sales Online Administrator can configure the links by navigating to Administration > Sales > Home Page> External Tools.
Marketing	Displays marketing information.	Marketing
News	Display news information from the Marketing Encyclopedia System, such as world, industry, internal, and competitor news from the home page. Indicate your preferences through Profiles > Homepage.	MES
Encyclopedia	Oracle Marketing Encyclopedia System (MES) stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories. For detailed information on using Marketing Encyclopedia System, please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures Guide.*	Oracle Sales Online's Encyclopedia subtab includes four subtabs; Category, My Channels, Publish, and Administration.
Resources	The Resources subtab allows you to search for resources or groups.	Resources
Reports	Lists all available reports and charts for Leads, Opportunities, Forecasts, and Customers. Also lists reports saved in "My Reports".	Click the report link to run the report. Click the Edit icon to edit report parameters.

To refresh the data in Lead and Opportunity bins and drill down reports, you must run the following concurrent programs whenever there is a change in data.

For a complete build:

- Initial Build of Opportunity and Lead Bins

- Initial Load for Lead Reports
- Initial Load for Opportunities Reports

For an incremental build:

- Refresh of Opportunity Bins Data
- Refresh of Lead Bins Data
- Initial Load of Opportunity Reports
- Initial Load of Lead Reports

For information on prerequisite concurrent programs and dependencies, please refer to the *Oracle Sales Online Implementation Guide*, section *"Running Concurrent Programs for Materialized Views"*.

4.1.1 Setting Up Bins, Charts, and Reports

Oracle Sales Online supplies a default set of home page bins, charts, and reports for those users who have not set up their own customized set of parameters. If you decide to customize your bins, charts, and reports, see the following directions.

Navigation

Profiles > Sales Online > Home Page

Steps

To set up bins, charts, or reports on your home page follow these steps:

1. Click **Add New Rows**.
2. Select the Bin Number from the drop down list. This will indicate the order in which the bins appear on the home page.
3. Select the Bin Name from the drop down list. See a list of the available bins and charts below.
4. Click **Update**.

For a list of the available bins and charts, see Section 4.1.2, "Available Bins and Charts".

4.1.2 Available Bins and Charts

You can customize the home page to display the bins and charts that are listed in the following section.

Navigation

Profiles > Home Page > Drop down under Bin Name

In order to see a list of available bins and charts, add a new row, select the row number, and click the drop down arrow in the "Bin Name" column.

List of available bins and charts:

- **New Leads**: This bin provides the count and amount of leads assigned to the user/period, rolling up to a sales person. Only the leads that are assigned to a sales group, and to a sales person, are rolled up and displayed in this bin.
- **Opportunity by Close Date**: This chart provides the ability to graph the open opportunities by close date. The opportunities that have a valid sales stage, an assigned sales group, and a resource, are rolled up and displayed in this chart. The decision date for the opportunities shown must be in the selected period range for this chart.
- **Opportunity by Status**: This chart provides the ability to graph the opportunity by status. The chart shows the open and won opportunities that have a decision date within the period range selected. The opportunities should have valid sales stage, be assigned to a sales group and a resource.
- **Opportunity by Win Probability**: This chart gives the ability to graph the opportunities by win probability. The opportunities should have a decision date within the period range selected, be assigned to a valid sales group and a resource.
- **Leads**: This chart gives the sales person the ability to graph new leads. The leads assigned to valid sales groups and resources (created in the selected time period range) are rolled up.
- **Forecast History-Self**: This chart gives the ability to graph the submitted forecast numbers for a sales person. Forecasts with forecast category and a sales credit type that do not match the default setting are not shown in this chart.
- **Forecast History-Subordinates**: This chart gives the sales manager the ability to graph the submitted forecast number for his/her subordinate sales

representatives or groups. Forecasts with forecast category and a sales credit type that do not match the default setting are not shown in this chart.

- **Top Customers**: This chart gives the sales person the ability to graph the lifetime value based on ordered amount 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 shows the pipeline Amount For Forecastable opportunities within the period or parameters indicated. This bin does not check the status of the opportunity.
- **Won Opportunities**: This bin shows the won amount for forecastable opportunities within the period or parameters indicated. This bin does not check the status of the opportunity.
- **My Forecast**: This bin provides a list of all forecast numbers that have been submitted per period by a sales person. If the value for "My Forecast Type" is set to "My Subordinate Forecasts" the forecast values submitted for the subordinate groups are shown here.
- **My Favorites**: This bin provides the ability to bookmark application pages, saved reports, or saved searches so that you can run them at a later time. Free URLs and the links published by system administration on the external tools page can also be saved for later access in this bin.
- **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.
- **Opportunity Status**: This bin shows links to a set of reports explained below:
  - **Closed Opportunities -** Opportunities that have been closed in the last "n" days and roll up to the logged in user are shown here. The value "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days".
  - **Aging Opportunities -** Opportunities that have been open for more than "n" days and roll up to the logged in user are shown in this report. The value "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Aging Days".
  - **High Value, About to Close -** Opportunities rolling up to the log in user that have values greater than certain amount and the close date is in the next "n" days are shown here. The opportunity value is controlled by "OSO:

Opportunity Variance Bin Reports Amount" profile. The value for 'n' is controlled by "OSO: Opportunity Variance Bin Reports Number of Days" profile.

- **High Value, Low Probability -** Open opportunities with value greater than the value specified by "OSO: Opportunity Variance Bin Reports Amount" profile and win probability less than the value specified by "OSO: Opportunity Variance Bin Reports Win Probability" profile that roll up to the log in person are shown in this report.
- **Lost Opportunities -** Opportunities that roll up to the log in person and have been updated to "Lost" status in the last "n" days are shown in this report. The value for "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days".
- **Opportunities About to Lose -** Open opportunities that roll up to the log in person and have a win probability less than the value set for "OSO: Opportunity Variance Bin Reports Win Probability" and have a decision date in the next "n" days. The value for "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days".
- **Opportunities Potentially lost -** Open Opportunities that roll up to the log in person and have a decision date in the next "n" days are shown in this report. The value for "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days".

See Also

Section 4.1.1, "Setting Up Bins, Charts, and Reports"

Section 4.1.3, "Editing a Bin, Chart, Report, or Graph"

For information about the profile options related to the following bins, please refer to Appendix A.1, "Setting System Profile Options".

4.1.3 Editing a Bin, Chart, Report, or Graph

You can edit the bin, chart, and graph parameters to meet your desired display preferences. Follow the directions below for each item that you want to edit. Two alternative ways of editing these items are provided for your reference.

Navigation

Home > Edit

Alternative 1

Follow these steps to edit the item directly from the Home Page. This method assumes that this bin is currently displayed on your home page. If the item is not currently displayed on the home page, go to Alternative 2.

Steps

1. Click **Edit**.
2. Change the parameters to meet your specific requirements.
3. Save your changes.

Alternative 2

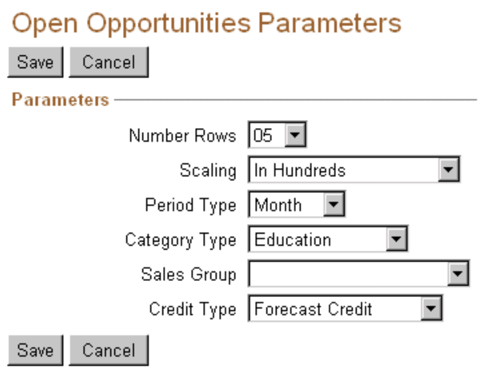
Follow these steps if the bin you want to edit is not currently displayed on your home page. This method takes you to the profiles page where you can set up the item and then edit the item.

Steps

1. Navigate to Profiles.
2. Click Home Page.
3. Click **Edit**.
4. Change the parameters.
5. Save your changes.

Example

The following screenshot shows the parameters that can be set for the Open Opportunities bin by clicking the Edit link.



Once you have updated the parameters, click **Save** to save your changes. If you do not want to keep the changes you have made, click **Cancel**.

4.1.4 Editing "My Favorites" Bin

You can customize the home page to list all the bins and reports that are of interest to your and your sales group. The "My Favorites" bin feature, allows you to further customize a bin to list items that are particularly important to you.

For a list of bins Section 4.1.1, "Setting Up Bins, Charts, and Reports"

Navigation

Home Page > Edit

Steps

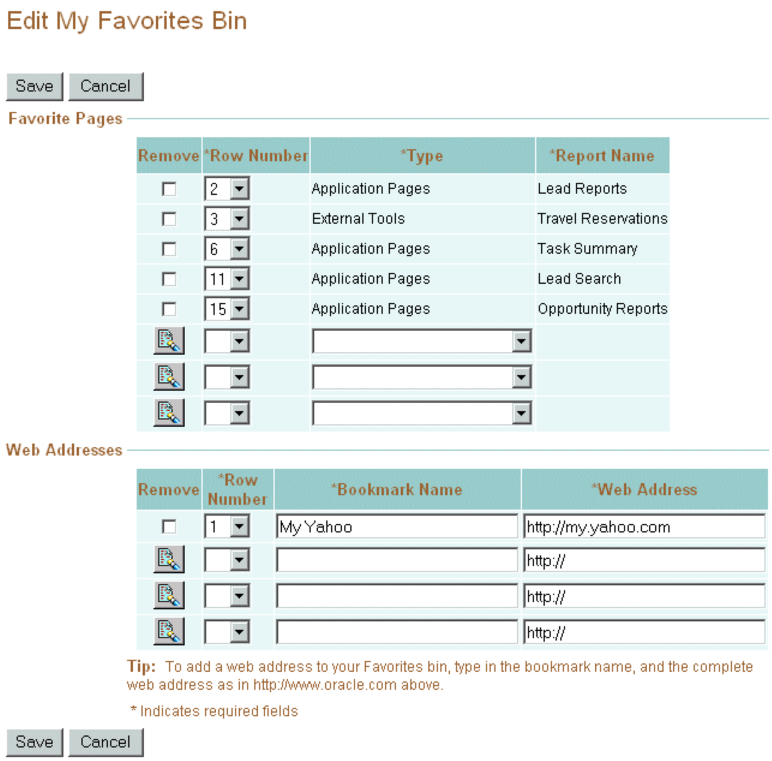
The Edit page for "My Favorites" Bin has two sections.

The first section is used for saving links to your favorite application pages, saved reports, saved searches, and external tools that you want to view in the bin.

1. Indicate the order in which you want the items to appear by selecting the number in the "Row Numbers" drop down list.
2. Enter the Type of page.
3. Save your changes.
4. If you choose to remove an item from the Favorites bin, select the "Remove" checkbox and click **Save**.

The second section is used for saving web addresses that you want to view in the bin.

1. Indicate the order in which you want the items to appear by selecting the number in the "Row Numbers" drop down list.
2. Enter the Bookmark name.
3. Enter the web address.
4. Save your changes.
5. If you choose to remove an item, select the "Remove" checkbox and click **Save**.


Edit My Favorites Bin
Save
Cancel
Favorite Pages
Remove
*Row Number
*Type
*Report Name
2
Application Pages
Lead Reports
3
External Tools
Travel Reservations
6
Application Pages
Task Summary
11
Application Pages
Lead Search
15
Application Pages
Opportunity Reports
Web Addresses
Remove
*Row Number
*Bookmark Name
*Web Address
1
My Yahoo
http://my.yahoo.com
http://
http://
http://
Tip: To add a web address to your Favorites bin, type in the bookmark name, and the complete web address as in http://www.oracle.com above.
* Indicates required fields
Save
Cancel

4.1.5 Internal Tools

The following tools are available from the Home Page:

- Section 4.1.6, "Using Territory Lookup"
- Section 4.1.7, "Using Event Lookup"

4.1.6 Using Territory Lookup

This tool provides a way for Oracle Sales Online users to locate the sales representative responsible for a particular territory. Please refer to the *Oracle CRM Application Foundation User Guide* for more information about the Territory Lookup Tool.

Navigation

Home > Tools > Internal Tools > Territory Lookup

Prerequisites

None

Steps

Follow these steps to use the Territory Lookup Tool:

1. Enter a full or partial organization name, using % as a wildcard.
2. Click **Go**.
3. Select the address for the company.

   The list of salespeople who are resources for a territory for the selected company is displayed.
4. Optionally, enter the State.
5. Click **Search**.

   A list of salespeople who are resources for a territory of the selected state is displayed.

4.1.7 Using Event Lookup

The search retrieves records of those event schedules which are active and whose end date and event registration end date are greater than present date and whose registration required flag is set to yes. See that the event registration start date and end date are set up for an active event.

Navigation

Home > Tools > Internal Tools > Event

Steps

Follow these steps to use the Event Lookup tool:

1. Enter search criteria.
2. Click **Search**.

You cannot modify the event details, but you can modify the roster details and register people.

Reference

See the *Oracle Marketing User Guide* and *Oracle Marketing Implementation Guide* for more information about this topic.

4.1.8 External Tools

This is a list of the seeded external tools that are available:

- Project Listing: Use this link to view all projects
- The Dun & Bradstreet Company Search: Search for company details in the Dun & Bradstreet database
- Active Expense Reports: Expense reports
- Travel Reservations: Use this link to do travel reservations
- View Notification Work List: Use this link to view notification work list
- IMeeting

These links are also available to add to your "My Favorites" bin on the home page. See Section 4.1.1, "Setting Up Bins, Charts, and Reports" for more information about setting up bins, charts, and reports.

Navigation

Administration > Sales > Home Page > External Tools

Steps

1. To add an external tool:

    a. Enter the required information for Category, Link Text, Link, Link Type, and Description

    b. Select the Enabled check box.

2. To disable an existing or seeded external tool:

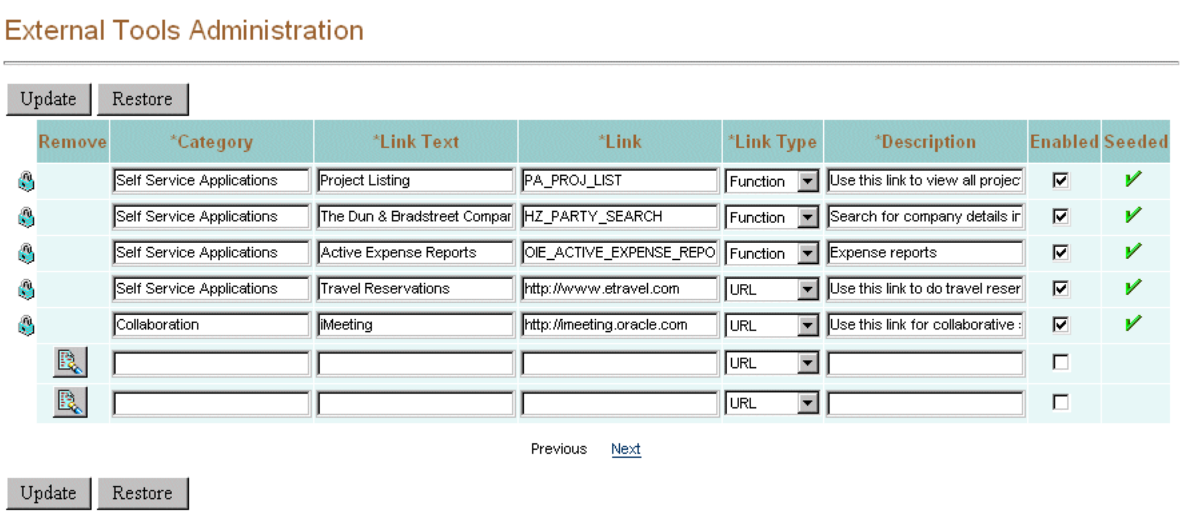
    a. Deselect the Enabled check box.

3. To remove an external tool:

    a. Click the Remove icon.

    b. Seeded external tools cannot be removed, they can only be disabled.

4. Click **Update**.



5

Calendar Tab

Sections in this chapter include:

5.1 Overview of the Calendar Tab

The Calendar tab includes the Views, Tasks, and Notes subtabs. You can use the Calendar tab to manage your tasks, appointments, and calendar.

Reference

Oracle CRM Application Foundation User Guide

5.1.1 About Calendar Profiles

Calendar profiles control what data is displayed in calendar views and how that data is displayed. Most of these items have default values and only need to be setup once.

Calendar profiles include:

- Personalize: Configure your calendar work schedule

  Navigation: Profiles > Calendar > Personalize

- Privileges: Grants access to other users to view your calendar

  Navigation: Profiles > Calendar > Privileges

- Group Calendar: Request a new Group Calendar to be created or Subscribe to an existing group calendar.

  Navigation: Profiles > Calendar > Group Calendar

- Switch Calendar: View a different calendar to which you have access

  Navigation: Profiles > Calendar > Switch Calendars

- Categories: Build categories for grouping your tasks

  Navigation: Profiles > Calendar > Categories

- Time Zone: Select the time zone in which you work. This must be set correctly for tasks to display on your calendar properly.

  Navigation: Profiles > Calendar > Time Zone

- Administration

  Navigation: Profiles > Calendar > Administrator

Reference

Oracle CRM Application Foundation User Guide

5.1.2 Using Calendar Views

You can use the calendar to track your daily, weekly, monthly, and yearly appointments. A combination view displays your calendar and your list of tasks on the same screen.

Under the Calendar subtab, there are three subtabs: Views, Tasks, and Notes. The following is a list of the views available in Oracle Sales Online's Calendar:

- Daily View
- Weekly View
- Monthly View
- Yearly View
- Combination View
- Availability
- Public Calendar
- Appointments

Reference

For complete information on using the functions available from the Calendar tab, please refer to the *Oracle CRM Application Foundation User Guide*.

6

Lead Tab

Sections in this chapter include:

6.1 Overview of the Lead Tab

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

Leads may be generated through different sources:

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

See Also

For information about implementing and importing leads, please refer to the *Oracle Leads Management Implementation and Administration Guide*.

Related Profiles

- OS: Assign New Lead

  Default Value : No
- OS: Auto Run Lead Engines While Update

  Default Value : Yes
- OS: Enable Real Time Lead Assignment

  Default Value : Yes
- OS: Run Lead Monitor Engine

  Default Value : Yes

6.1.1 Personalizing Leads

Navigation

Lead > Leads > Personalize

Prerequisites

None

Steps

Follow these steps to personalize leads:

1. Click **Personalize**.

   The Lead Search page opens.

2. Change, add, or remove search parameters. Search fields for lead information include:

   - Lead Name
   - Lead Name / Value pairs
   - Lead Number
   - Lead Owner
   - Project
   - Assigned Date Range
   - Creation Date fixed and relative time frames (for reusable work queue of new leads)
   - Expiration Date
   - Last Updated fixed and relative time frames (for tracking neglected leads)
   - Contact details (including name and role)
   - Status
   - Lead Rank
   - Channel
   - Response Channel
   - Time Frame

- Budget Status
- Source Name
- Campaign and Offer code
- Budget Amount
- Total Purchase Amount
- Close Reason
- Decline Reason
- Urgent
- Accepted
- Qualified
- Referral Type
- Referred By
- Context Value

Search fields for customer information include:

- Customer
- Customer region (including state, province, county, city, and postal code)
- Customer Category
- Country

Search fields for sales team information include:

- Sales Group
- Salesperson
- Partner Name
- Owner
- Include Account Manager Privilege

3. Change, add, or remove display and sort options.
4. Enter a Search Name. Optionally, select the "Use as Summary Page Default" check box.

5. Click **Save** to save the search without applying it, or **Save and Apply Search** to save and apply the search.

6.1.2 Creating a Lead

Navigation

Lead > Leads

Prerequisites

None

Related Profiles

See Section 3.5.3, "Setting Lead Profiles".

Steps

Follow these steps to create a lead:

1. Click **Create**.

   The Create Lead page opens.

2. Select a customer by typing the full or partial name using % as a wildcard.
3. Select a location from the drop down list.
4. Click **Go**.

   If you do not find the customer for which you wish to create a lead, click **Create Customer** and follow the instructions in **Section 10.1, "Overview of the Customer Tab"**.

5. From the search results page, select the radio button.

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

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

6. Enter the name of the lead that will be used to identify the lead.
7. Select the Urgent or Qualified check boxes to identify the lead as urgent or qualified. If the Qualified check box is left unselected and the profiles are

properly set for Automatic Lead Qualification, this lead will be run through the Lead Rules Engine automatically upon creating the lead.

8. Select a project to associate this lead to by entering the project name and clicking **Go**.
9. Optionally, enter the Lead Owner. If Lead Owner is left blank, the lead will be automatically assigned.
10. Select a Status from the drop down list. This is a required field.
11. Select a Channel from the drop down list.

    If the Channel field is left blank and the profiles are properly set for Automatic Sales Channel Selection, this lead will be run through the Lead Rules Engine automatically upon creating the lead.

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

    - Select the Lead Rank from the drop down list.

      If the Rank field is left blank and the profiles are properly set for Automatic Lead Ranking, this lead will be run through the Lead Rules Engine automatically upon creating the lead.
    - Select the Response Channel from the drop down list.
    - Select the Budget Status from the drop down list.
    - Select the Time Frame from the drop down list.
    - Enter a Source Name and click **Go**.
    - Enter an Offer and click **Go**.
    - Select a Referral Type from the drop down list.
    - Enter a Referred By name and click **Go**.
    - Enter a Budget amount and select the currency with which the budget is to be associated. Purchase Items will reflect the same currency code as selected here.
    - Select a Close Reason from the drop down list. Close reason is a required field when lead status is "Closed".
    - In the Purchase Items section, select a Product Category from the drop down list.
      - Select an Inventory Item, Unit of Measure, Quantity, Amount, Source Name, and Offer, if applicable.

- In the Contacts table, add contacts by:
  - Entering the person's name that you wish to add as a contact in the "Add a Person" field and clicking **Go**.
- In the Notes table, enter a note by:
  - Selecting the Type.
  - Selecting the Status.
  - Entering the note text.
  - If you want to relate this note to a party, enter the requested information.

12. Click **Create**.

6.1.3 Maintaining a Lead

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

Note: The Leads Rules Engine is automatically run when a lead is created. However, upon updating, you must click the Run Leads Engines button for the process to take into account any new information. See the *Oracle Leads Management Implementation and Administration Guide* for more information.

Navigation

Lead > Leads

Prerequisites

A lead must exist.

Steps

Follow these steps to modify or update an existing lead:

1. Search for a lead using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

The following table describes the Lead Detail fields.

Field	Required Field	Description
Lead Name	Yes	Lead name
Customer	Yes	You can click the link to view the customer details.
Customer Address	No	You can edit information or change the location by clicking the Change Location button.
Project	No	Enter the full or partial name and click **Go**.
Lead Owner	No	Insert the lead owner. If this field is left blank, the lead is automatically assigned.
Status	Yes	Select a status from the drop down list.
Channel	No	Select a channel from the drop down list. The Channel field drives how the lead is going to be worked on. The purpose of the Channel field under the Leads tab is for routing leads (what type of people will be working on the lead). The values Direct and Indirect do the following: Direct - routes information to an Internal Sales Rep. Indirect - routes information to a Partner If this field is left blank, the lead channel is automatically assigned.
Timeframe	No	Select a time frame from the drop down list.
Source Name	No	Find a source code by entering the full or partial name and click **Go**.
Offer Code	No	
Budget	No	Enter the total budget and select a currency.
Decline Reason	No	A decline reason is required only if you click the Decline button. Enter a reason that the lead is being declined.
Close Reason	Yes	If lead status is set to "dead lead" or "loss". Enter the reason that the lead is being closed.
Lead Number	No	View the lead number.
Urgent/Qualified	No	Select that the lead is urgent or qualified with the associated check boxes. For Qualified, leave the field blank if you want the rules engine to decide.

Field	Required Field	Description
Accept	No	Click the Accept button to accept the lead.
Assigned Date	No	Read only field.
Lead Rating	No	Priority of lead. Leave blank if you want the rules engine to assign.
Response Channel	No	Select a vehicle response code from the drop down list.
Budget Status	No	Select a budget status from the drop down list.
Referral Type	No	Select from the drop down list.
Referred By	No	Select from the drop down list.

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

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

3. Click the Run Lead Engine button to run the Lead Engine and use qualification, rating, and channel selection rules. See Section 6.1.7, "Rating a Lead" for more information.
4. Click **Update**.

6.1.4 Searching for a Lead

Navigation

Lead > Leads

Prerequisites

A lead must exist.

Steps

1. Search for a Lead using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

6.1.5 Assigning a Lead Owner

A lead is re-routed by selecting another member of the sales force from the "Lead Owner" list of values.

Navigation

Lead > Leads

Prerequisites

None

Steps

Follow these steps to re-assign a lead:

1. Search for the lead you want to re-assign using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. In the Lead Owner field, enter a search string and click **Go**.

   If the Lead Owner field is left blank, the lead will be automatically assigned.
4. From the list of values, select the sales team member to which you want to re-assign the lead.

5. Click **Update**.

6.1.6 Qualifying a Lead

A response turns into a lead when it is qualified, or when it is confirmed that there is sufficient interest for a sales representative to engage the prospect through an interaction.

A lead is qualified manually or through the lead rules engine.

For information on setting up the Leads Rules Engine, please refer to the *Oracle Leads Management Implementation and Administration Guide*.

Alternative 1-Lead Rules Engine Qualification

Navigation

Lead

Prerequisites

Make sure the system profile OS: Auto Qualify Lead is set to "Yes".

The default is "Yes".

Steps

If the "Qualified" check box is left blank, then the Lead Rules Engine will automatically assess whether the lead is qualified or not using the parameters set up by the System Administrator.

Click **Run Leads Engines**.

Alternative 2-Manual Qualification

Navigation

Lead

Prerequisites

None

Steps

Follow these steps to manually indicate that a lead is qualified:

1. Search for the lead you want to qualify using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. From the Lead Detail page, select the Qualified check box.
4. Click **Update**.

   If this check box is left blank, the Qualification Engine, described above, will determine if the lead is qualified or not by clicking the Run Leads Engines button.

6.1.7 Rating a Lead

This functionality can be automated by a Rules Engine for lead rating or by manually indicating the lead rank.

For information on the set up of this functionality, please refer to the *Oracle Leads Management Implementation and Administration Guide*.

Alternative 1-Ranking with the Lead Rules Engine

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.

Navigation

Lead

Prerequisites

Make sure the system profile OS: Rank Lead is set to "Y". The default is System.

Steps

If the Lead Rank field is left blank, then the Lead Rules Engine will automatically assess the rank of the lead according to the parameters outlined by the System Administrator.

Click **Run Leads Engines**.

Alternative 2-Manually Rank a Lead

Steps

Follow these steps to manually indicate a lead rank:

1. Search for the lead you want to rank using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

   From the Lead Detail page, select the lead rank from the drop down list. If this field is left blank, the Rating Rules Engine, will determine the lead rank by clicking the Run Leads Engines button.
3. Click **Update**.

6.1.8 Selecting a Sales Channel

Depending on the quality of the lead, the lead is channeled to a set of resources for routing: direct or indirect. (This may include routing the leads to an administrator for review, or a default telemarketing group for further qualification.) A sales channel is direct when routed to the company's sales force and indirect when routed to partners or value added distributors.

This functionality can be automated by a Rules Engine for sales channel selection or by manually indicating the sales channel.

For information on the set up of this functionality, please refer to the *Oracle Leads Management Implementation and Administration Guide.*

Alternative 1-Lead Rules Engine Selects the Sales Channel

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.

Navigation

Lead

Prerequisites

Make sure the system profile OS: Run New Lead Qualification, Rating, Channel Selection Engines is set to" Y".

Steps

If the Channel field is left blank, then the Lead Rules Engine will automatically assign the sales channel for the lead according to the parameters outlined by the System Administrator.

Click **Run Leads Engines**.

Alternative 2-Manually Selecting a Sales Channel

Steps

Follow these steps to manually select a sales channel:

1. Search for the lead you want to select a sales channel for using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

   From the Lead Detail page, select the sales channel from the drop down list. If this field is left blank, the Rating Rules Engine, will determine the sales channel by clicking the Run Leads Engines button.
3. Click **Update**.

6.1.9 Declining a Lead

If you decline a lead, the decline reason is required and stored in the lead history. The lead is routed to the next available resource based on the territory setup. If there is no resource found, the lead is assigned to a default resource (set up in profile option OS: Default Resource ID for Sales Lead Assignment). If you have not set this profile option, the lead is assigned back to the user who declined the lead.

Declining a lead removes you from the sales team. If you are not on the sales team, you do not have update access to the lead.

The lead will be sent through lead assignment again and the next qualified sales representative will have the option to decline or accept the lead. However, if you are the only person on the sales team that the lead is assigned to, it may return to you for acceptance once again.

Navigation

Lead > Leads

Steps

1. Search for the lead you want to decline using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Select a **Decline Reason** from the drop down list. This is a required field.
4. Click the **Decline** button.
5. Click **Update**.

6.1.10 Using Mass Update

Navigation

Lead > Leads

Prerequisites

None

Steps

1. From the Leads Summary page, click the Mass Update button.

   The Lead Search page opens.
2. Select search criteria and display options.
3. Click **Search**.
4. To update lead status, select the leads.
5. Choose the appropriate status.

   Close reason is a required field when lead status is closed.
6. Click **Update**.

6.1.11 Using Mass Evaluate

Navigation

Lead > Leads

Prerequisites

None

Steps

1. From the Leads Summary page, click the Mass Evaluate button.

   The Lead Search page opens.

2. Select search criteria and display options.
3. Click **Search**.
4. To run leads through the rules engines (qualification, rating and distribution). Select the leads, ensure the relevant fields are blank.
5. Click **Run Engines**.

   To override any of the values, choose the values for the selected leads.

6.1.12 Attaching a Contact to a Lead

Attach a contact to a lead by following these steps.

Navigation

Lead > Leads > Contacts

Prerequisites

A lead must exist.

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

3. Click the **Contacts** link.

From this page you can create a person, contact, or relationship by adding the required information directly into the summary table. Or you can add a contact by following the next steps.

4. Add a contact by entering the full or partial name in the Add a Person field and clicking **Go**.

   The Select a Person page opens.

5. Select the person from the search results by clicking the Select check box OR search for all people or all contacts by selecting the radio button.
6. Click **Select**.
7. To remove a contact, select Remove and click **Update**.
8. To edit information directly onto the summary table, change the information.
9. Click **Update**.

6.1.13 Creating a Note

Follow these steps to create a lead note:

Navigation

Lead > Leads > Notes

Prerequisites

None

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

3. Click **Notes**.
4. Click **Create**.
5. Select the Note Type from the drop down list. This is a required field.
6. Select the note Status from the drop down list. This is a required field.
7. Enter the note Text in the text box. This is a required field.

8. To relate this note to a party, enter Type and Name information.
9. Click **Create**.

   Please refer to the *Oracle CRM Foundation Application Foundation User Guide* for information about note details.

6.1.14 Viewing All Notes

Navigation

Lead > Leads > Notes

Prerequisites

None

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Click **Notes**.
4. Click **All Notes**.

6.1.15 Viewing Note History

Navigation

Lead > Leads > Notes

Prerequisites

None

Steps

1. Select the note Type from the drop down list.
2. Enter the number of days for which you want to view the notes history in the "Show Notes for Last <number> Days".
3. Click **Apply**.

6.1.16 Creating a Task

Follow these steps to create a lead task:

Navigation

Lead > Leads > Tasks

Prerequisites

None

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Click **Tasks**.
4. Click **Create**.
5. Enter task details.

   Please refer to the *Oracle CRM Foundation Application Foundation User Guide* for information about task details.
6. Click **Update**.

6.1.17 Creating an Attachment

Follow these steps to create a lead attachment:

Navigation

Lead > Leads > Attachments

Prerequisites

None

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

3. Click the **Attachments** link.
4. Click **Create**.
5. Enter a description. This is a required field.
6. Select a file, enter text, or enter the URL to attach.
7. Click **Create**.

   Please refer to the *Oracle CRM Foundation Application Foundation User Guide* for information about attachment details.

6.1.18 Converting a Lead to an Opportunity

Follow these steps to convert a lead to an opportunity. Please note, a lead can be converted into multiple opportunities but once a lead is converted to an opportunity and updated, it cannot be converted back. Additionally, if you set the status to "Closed", no close reason is required.

Navigation

Lead > Leads

Prerequisites

A lead must exist.

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Click **Convert to Opportunity**.

   The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
4. Click **Create Opportunity**.

6.1.19 Linking a Lead to an Opportunity

Follow these steps to link a lead to an opportunity:

Navigation

Lead > Leads

Prerequisites

The lead and the opportunity must exist.

Steps

1. Search for the lead you want to link using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Click the **Convert to Opportunity** button.

   The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
4. Choose the "**Select**" button to indicate the opportunity you have selected.

   The Lead Linking Opportunity Detail page opens.
5. Click **Link to Opportunity**.

Please note, linking a lead to an opportunity does not automatically add the user to the opportunity sales team.

6.1.20 Appending Lead Lines to an Opportunity

Follow these steps to append a lead to an opportunity:

Navigation

Lead > Leads

Prerequisites

The lead and the opportunity must exist.

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

3. Click **Convert to Opportunity**.

   The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.

4. Choose the "**Select**" button to indicate the opportunity you have selected.

   The Lead Linking Opportunity Detail page opens.

5. Select the "Select" check box next to the lead lines you want to append to the opportunity.

6. Click **Link to Opportunity**.

Please note, the user that appended the lead to the opportunity is automatically added to the opportunity sales team and selected lines from the lead are added to the opportunity. No other information is updated.

6.1.21 Sales Teams

You can perform the following functions for sales teams:

- Section 6.1.21.1, "Adding an Internal Sales Team Member"
- Section 6.1.21.2, "Adding a Resource Team to a Sales Team"
- Section 6.1.21.3, "Adding an External Sales Team Member"

6.1.21.1 Adding an Internal Sales Team Member

Follow these steps to add an internal sales team member:

Navigation

Lead > Leads > Sales Teams > Internal

Prerequisites

A lead must exist.

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".

2. Select the lead by clicking the lead link.

   The Lead Detail page opens.

3. Click **Sales Team**.

4. Click **Internal**.
5. Enter the last name or partial name of the sales representative in the "**Add a Salesperson**" field, click **Go**.
6. Choose the "Select" check box.
7. Click **Select**.

   The salesperson will be added to the Sales Team summary table.
8. Select a Role from the drop down list.

   You can view the email address and phone number for this salesperson.
9. Click **Update**.

6.1.21.2 Adding a Resource Team to a Sales Team

Navigation
Lead > Leads > Sales Teams > Internal

Prerequisites
A lead must exist.

Please note, you can only add resource teams to internal sales teams.

Steps
1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Click **Sales Team**.
4. Click **Internal**.
5. In the "Add a Resource Team" field, enter the resource name or the wildcard (%) and click **Go**.
6. Select a resource from the search results page by clicking the link.
7. Click **Update**.

For sales teams, if you add a sales person to the sales team using Add Resource Team, and if a resource team contains partners, then the partners will not appear in the internal sales team. Partner resources will appear in the external sales team. This applies to Leads, Opportunities, and Customers.

6.1.21.3 Adding an External Sales Team Member

Navigation

Lead > Leads > Sales Teams > External

Prerequisites

A lead must exist.

Steps

1. Search for the lead using Section 3.2.1, "Using Quick Find or Advanced Search".
2. Select the lead by clicking the lead link.

   The Lead Detail page opens.
3. Click **Sales Team**.
4. Click **External**.
5. Enter the partner name in the "Add a Partner" field, click **Go**.
6. Select a partner from the search results page by clicking the link.
7. To add a partner contact, enter the partner contact name and click **Go**.
8. Click **Update**.
9. To remove a partner, select the Remove check box and click **Update**.

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

For sales teams, if you add a sales person to the sales team using Add Resource Team, and if a resource team contains partners, then the partners will not appear in the internal sales team. Partner resources will appear in the external sales team. This applies to leads, opportunities, and customers.

6.1.22 Lead Reports

Under the Leads tab, you will find a Reports subtab. Click the subtab to view Lead reports.

6.1.22.1 Viewing the Lead Import Status Report

This report provides the status of the lead imports.

Navigation

Lead > Reports

Prerequisites

You must have imported leads.

Steps

1. Click the Lead Import Status Report link.

   The Lead Import Status Report page opens.

2. Select a Processed Start Date and Processed End Date using the Calendar icon.
3. Select the Source System from the list of values.
4. If you want to rename the search and save it, enter a new search name in the Report Name field.
5. To Save the report without running it, click **Save**.
6. To Save and Run the report, click **Save and Run Report**.
7. To Run the report without saving it, click **Run Report**.

7

Opportunity Tab

Use the Opportunity tab to create new opportunities and maintain details about existing opportunities. Opportunities are pending sales that can be forecasted. Quick links at the top of the page and the "Return to Top" links in each section allow for easy navigation between sections.

Sections in this chapter include:

7.1 Overview of the Opportunity Tab

Opportunities are pending sales that can be forecasted.

Process Overview

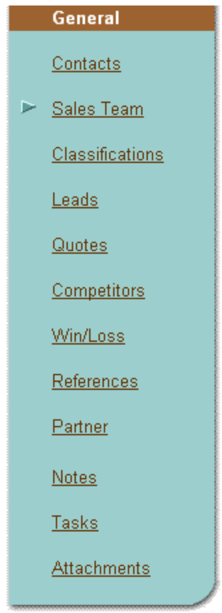
Once a potential opportunity is identified, a sales representative can:

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

By default, the sales representative who created the opportunity has full access to the opportunity. Full access means that the sales representative who created the opportunity can add other sales team members, assign sales credits, and estimate the likelihood that an opportunity will succeed. Additionally, sales representatives and their managers use this opportunity information to forecast sales under the Forecast tab.

For more information about how access to data is set up, please refer to the *Oracle Sales Online Implementation Guide*, section *"Setting Up Users, Security, and Reporting Hierarchy"*.

The Opportunity tab consists of the following submenus:



These submenus are available as links to information related to the opportunity.

See Also

- Section 3.6.1, "Opportunity Overview"for information about sales methodologies
- Section 14.3.17, "Win Probability" for information on setting up win probabilities
- Section 14.3.18, "Sales Stage" for information on setting up sales stages
- Section 14.3.19, "Status Code" for information on setting up status codes
- Section 14.3.20, "Sales Methodology" for information on setting up sales methodologies

7.2 Personalizing Opportunity Summary

To create a new search, or update an existing search, click the "Personalize" button. Some saved searches are provided with the application, however you can create your own searches with this feature. For example, you can create searches called, "My Opportunities Closing This Week" or "My Opportunities in Stage 3". To do so, follow the instructions outlined in the section below.

Navigation

Opportunity > Personalize

Prerequisites

None

Steps

1. Click **Personalize**.
2. Change, add, or remove parameters to include the opportunities that you want to display in your new search.

   For example, all opportunities (for which you have access) in a particular sales stage can be selected. Select the sales stage from the list of values, give the search a name, and click **Save and Apply Search**.

   For information about security (which controls access to data), please refer to the *Oracle Sales Online Implementation Guide*, section *"Setting Up Users, Security, and Reporting Hierarchy"*.
3. Change, add, or remove display options to indicate which columns you want displayed.

   To select items to display, click the right arrow to move the items from Available Columns to Displayed Columns.
4. Change, add, or remove sort options to indicate how you want to sort the rows and in what order.

   Also indicate the number of rows you want to display per page in the field provided.
5. Enter a Search Name.
6. Select the "Use as a Summary Page Default" check box to use this search as your summary page default. This means that when you enter that particular tab, this search is displayed in the summary table, by default.

7. Click **Save** to store the query you have created OR click **Save and Apply Search** to save it and use it immediately.

Information About the "Include Account Manager Privilege" Checkbox

The following section describes the importance of the "Include Account Manager Privilege" checkbox in the Sales Team Information section of the Personalize page, and how it works:

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

The "Include Account Manager Privilege" checkbox is important if the person performing the advanced search is either an account manager OR if someone in their sales hierarchy has the "account manager" privilege assigned to them.

Note the following:

If the "Include Account Manager Privilege" checkbox is selected, the Advanced Search feature will display all opportunities for which:

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

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

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

7.3 Creating an Opportunity

Opportunities are pending sales that can be forecasted. Users with "create" access of opportunities can create opportunities within the application.

Navigation

Opportunity > Create Opportunity

Prerequisites

None

Related Profiles

"**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 or create pages. If set to "Yes", the application will use a list of values. If set to "No", the application will use a drop down list.

For more information about profile options, refer to the *Oracle Sales Online Implementation Guide.*

For more information about data access, refer to the *Oracle Sales Online Implementation Guide*, section *"Setting Up Users, Security, and Reporting Hierarchy"*.

See Also

Section 7.3.1, "Quick Create"

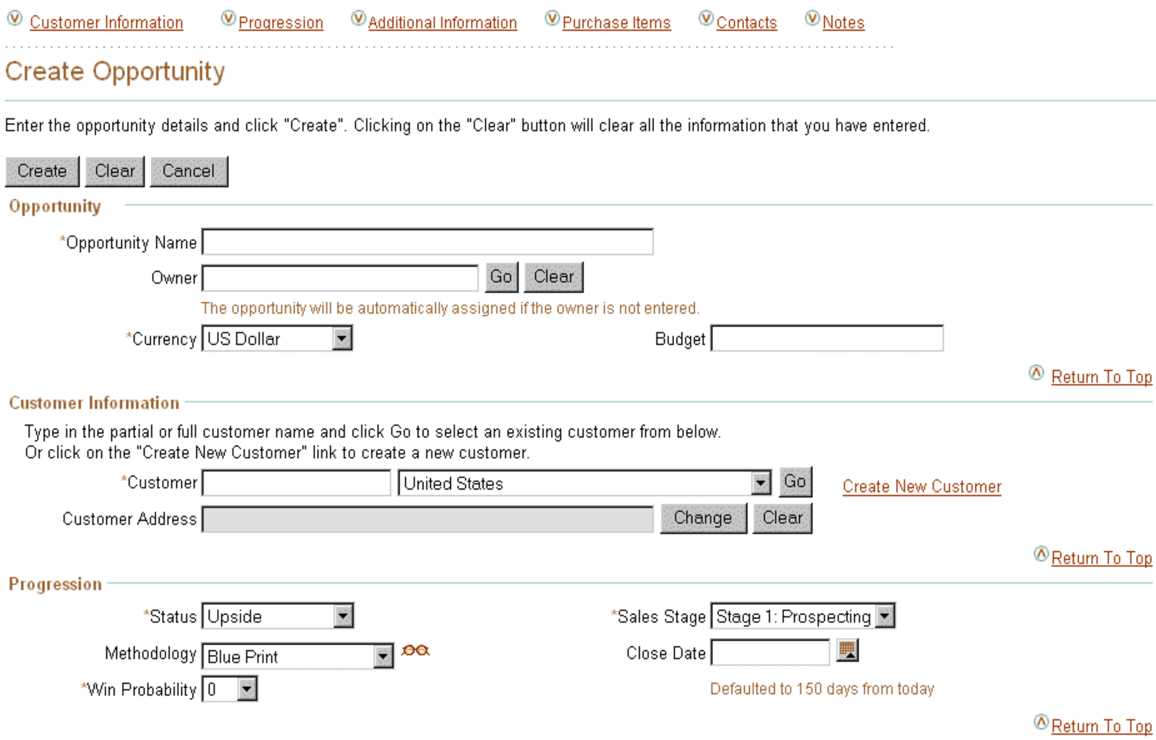
Steps

Follow these steps to create a new opportunity:

1. Click **Create** or go to the Quick Create.

   The Create Opportunity page opens.

   Quick links at the top of the page and the "Return to Top" links in each section allow for easy navigation between sections.



2. Enter an opportunity name, this value will be used throughout the application to identify this opportunity.
3. Assign an opportunity owner.

   Enter the full or partial name and click **Go**. The owner will be automatically added to the internal sales team of this opportunity and the Owner radio button column in the opportunity sales team screen will be checked for the sales person that was added.
4. Select the desired currency that this opportunity will be using from the drop down list.
5. Enter the budget amount for this opportunity, if known.
6. Use the Select a Customer field and enter the full or partial name of the organization or person that you want to find.
   a. If the customer is located in a country outside of your country, select that country from the drop down list.

b. Click **Go**.

   The Select a Customer page opens with the search results.

c. Select a customer by clicking the customer link.

d. If you do not find the customer that you are searching for, click **Create Customer**. Enter the new customer information and click **Create**.

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

7. In the Progression section, add the following information:

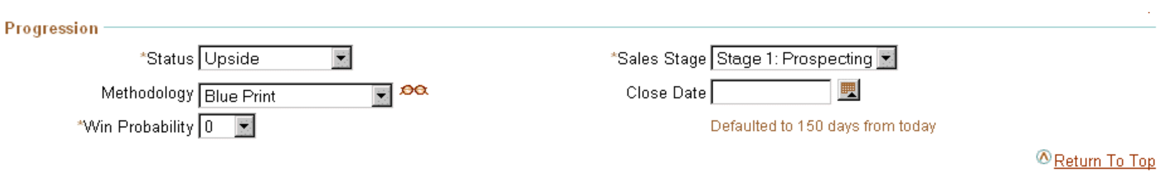
   a. Select a Status from the drop down list.

   b. Optionally, add a Sales Methodology from the drop down list. The "Eyeglasses" icon displays the details of the current selection. Click to view details.

   c. Select the Win Probability for the opportunity from the drop down list.

   d. Select the Sales Stage from the drop down list.

   e. Optionally, select the Close Date.



8. In the Additional Information section, you can add the following information:

   a. Optionally, relate this opportunity to an existing project. Select the project and click **Go**.

   b. To create a new project, select the Create a Project radio button and enter a project name.

   c. Optionally, select the Key Competitor for this opportunity.

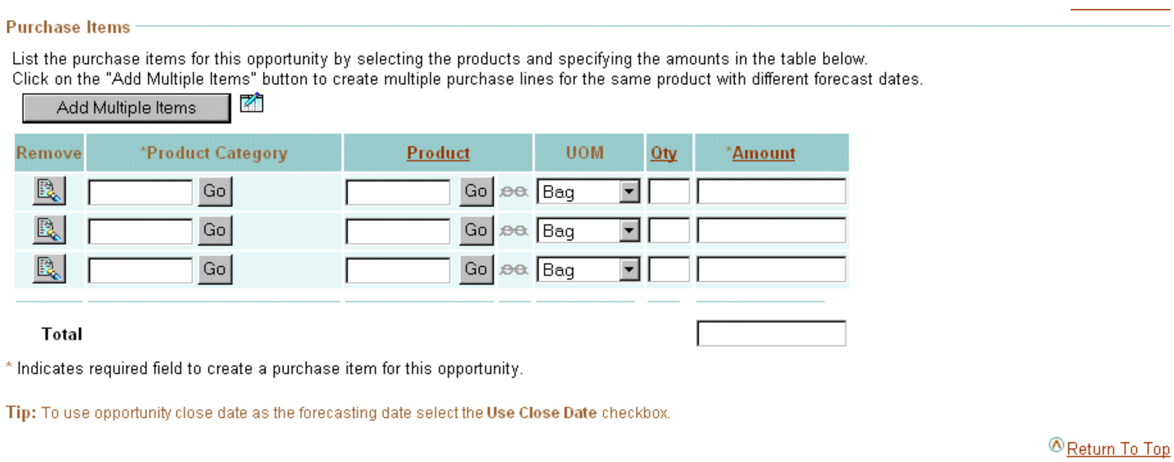
   d. Optionally, find the Source of the opportunity.

   e. Select a Sales Channel from the drop down list. Sales Channel is the only field required to create this opportunity.

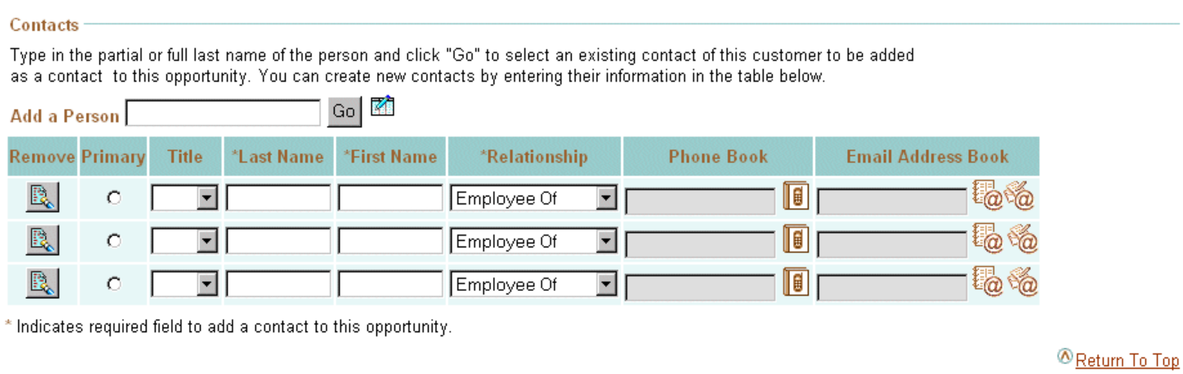
   f. Optionally, select the Response Channel for this opportunity from the drop down list.

g. Optionally, related an Offer to the opportunity. Enter the offer name and click **Go**.

9. In the Purchase Items section, list the purchase items for this opportunity by selecting the products and specifying the amounts in the table. Click the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates.



10. Optionally, you can enter Contacts by typing the partial or full last name of the person and clicking **Go**. Select an existing contact of this customer to be added as a contact to this opportunity. You can create new contacts by entering their information into the table directly.

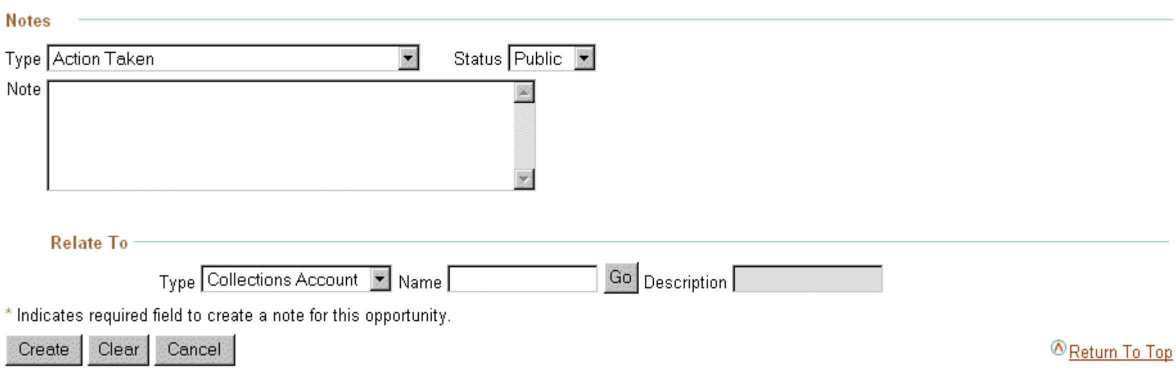


11. In the Notes section:

    a. Choose the Type from the drop down list.

    b. Select the Status from the drop down list.

    c. Enter the text in the Text box.



12. Click **Create** to create the opportunity. Click **Clear** to clear all the information that you have entered.

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

7.3.1 Quick Create

This feature provides you with a quick way to create new opportunities. Basic information is used to create new opportunities.

Navigation

Opportunity > Quick Create

Steps

1. Click **Quick Create**.

   The Create Quick Opportunity page opens.

2. Enter an opportunity name, this value will be used throughout Oracle Sales Online to select and view this opportunity.

3. Select a customer to associate this opportunity with by entering the customer name, click **Go**. Select from the search results.
4. Change the customer address, if necessary.
5. Select the source of the opportunity by entering the first few letters of the source name (% wildcard character can be used), click **Go**.
6. Select the currency with which this opportunity will be evaluated.
7. Optionally, select the offer associated with the opportunity.
8. Select the sales channel with which the opportunity was received.
9. Enter purchase items, if applicable.
10. Click **Create**.

Once you have created the opportunity successfully, you receive a message confirming that a new item has been created.

7.4 Creating Rolling Opportunities

Overview of Rolling Opportunities

Rolling opportunities are opportunities in which the deal is scheduled to close at a specified date, but the revenues are registered in phases over an extended period of time. Using the Forecast Date, the same opportunity can be forecasted across multiple periods.

Steps

The following steps allows you to create rolling opportunity line items.

1. While creating a new opportunity or updating an existing opportunity, click the "Add Multiple Items" button in the purchase item section.
2. Select the Product Category. You can search for inventory items by entering a partial inventory item name, and click **Go**.
   a. Choose from the list of inventory items.
   b. Enter the quantity and amount.
   c. Select the source code.
   d. Select the offer.
3. Enter the number of line items to be created for this product category.

4. Enter or select a starting date. This is the date of the first line items.
5. Enter the number of days between each forecast date
6. Click **Add**.

   The opportunity is updated with the chosen number of purchase lines. Using the starting date and the intervals, the close date is calculated for each purchase line. The Use Close Date check box is unchecked for all these line items. This check box is used to default the opportunity close date for the line item. When manually entering line items, this box is defaulted to checked.

   The new purchase lines of the opportunity are treated as any other line item. There is no link between the lines, therefore any updates must be made to each purchase line.

7.5 Maintaining Opportunity Detail

Keeping opportunity details current is an important part of Oracle Sales Online's functionality. By remaining current, these details are available to other sales team members who may view the opportunity at any given time. Follow these steps to maintain updated opportunity details.

Navigation

Opportunity > Opportunities

Prerequisites

An opportunity must exist in order to update the details.

Related Profiles

OSO: Use Product Category LOV: If this profile is set to "Yes" by the System Administrator, then the related pages will include a list of values (instead of a drop down list) for product categories.

Additionally, access to edit the details of an opportunity is determined by the security set up done during implementation.

For information on profiles and security, refer to the *Oracle Sales Online Implementation Guide*.

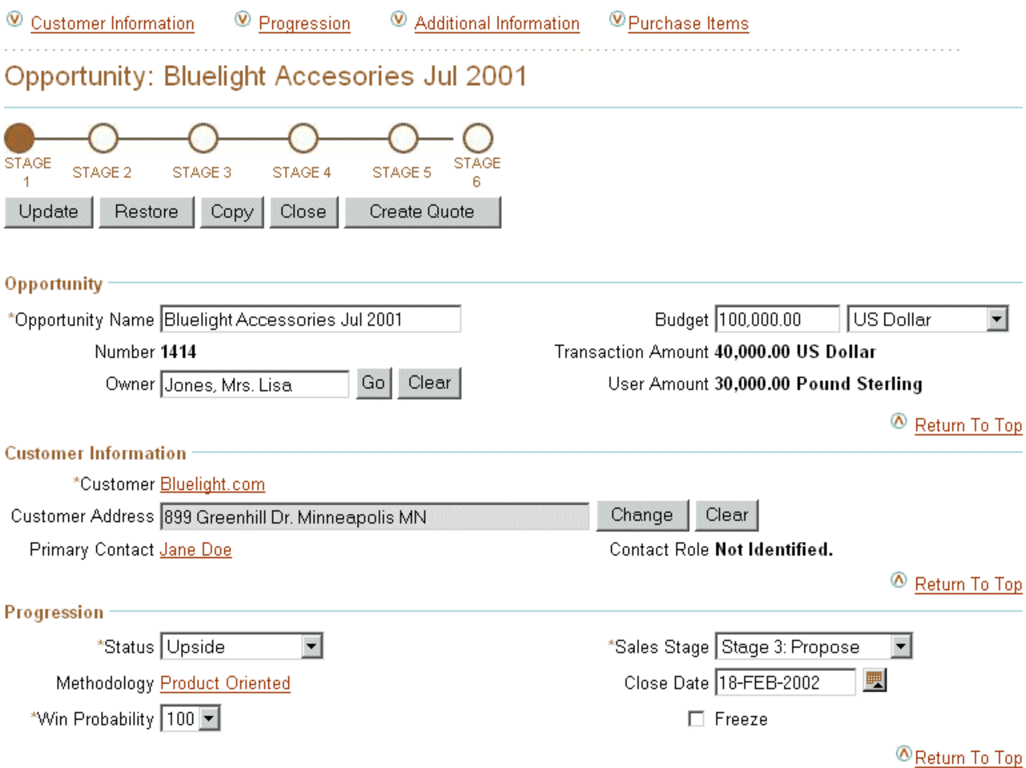
Steps

1. Search for the opportunity using Using Quick Find or Advanced Search. Or to find an opportunity through one of your saved searches, select the search name from the drop down list, click **Go**.

2. Select the opportunity by clicking the opportunity link.

   The opportunity detail page opens.

   Quick links at the top of the page, and the "Return to Top" links in each section, allow for easy navigation between sections. Links to other topic areas are listed on the left side of the page.



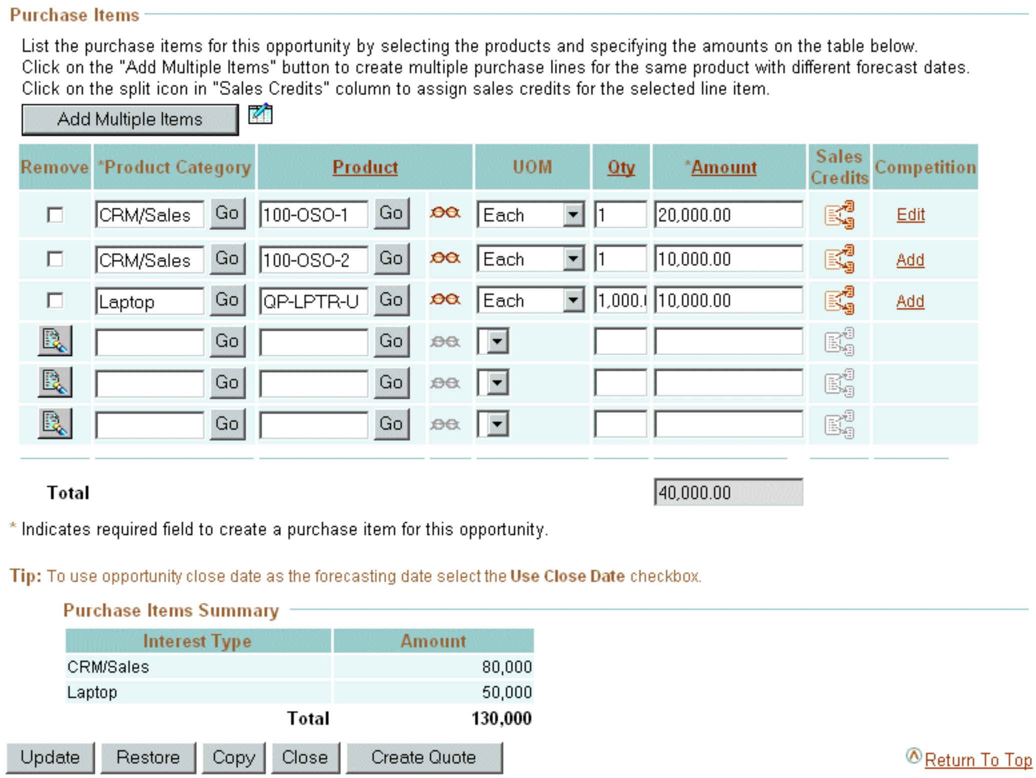
3. Add or update information on the opportunity detail page.

The following table describes the fields available on the opportunity page.

Field Name	Description
Opportunity Name	An identifying name for the opportunity, which will be used to identify the opportunity, and for reporting.
Budget	The customer budget for the opportunity. Please note, the currency used for the transaction amount and the currency for the budget are the same value. If the budget currency is updated, the transaction amount currency will also be changed.
Transaction Amount	Total amount based on the currency of the entire opportunity.
Currency	The currency that the opportunity would use.
Owner	Update the owner of an opportunity from the opportunity detail screen by changing the value of this field. The opportunity detail page and the sales team page will always be automatically synchronized when the owner of the opportunity is updated from either page. If you reassign the opportunity to a sales person who is not on the internal sales team from the opportunity detail screen, then the new owner will be added to the sales team automatically.
Customer Address	The address at which the customer is located.
Primary Contact	The name of the primary contact for this opportunity.
Status	This field indicates the sales status of the opportunity. This includes open statuses.
Methodology	This field indicates the sales methodology that was selected for this opportunity.
Win Probability	This number indicates the probability that the opportunity will be won.
Sales Stage	The sales stage of the opportunity.
Close Date	The expected close date for the opportunity.
Freeze	This check box facilitates the opportunity lock out feature for this specific opportunity. Once this check box is selected, no one on the sales team is allowed to update the opportunity. This "Freeze" check box overrides all access privileges. However, users whose "Update Frozen Opportunities" profile option is set to "Yes" can update frozen opportunities and deselect the Freeze check box.

Field Name	Description
Project	Search for a project to associate the opportunity with.
Key Competitor	The key competitor for the opportunity.
Source	The marketing source name that generated the opportunity. An example is "by direct mail".
Sales Channel	The sales channel that generated the opportunity.
Response Channel	The response channel related to the opportunity.
Offer	If there is an offer associated with the opportunity, enter the name and click Go.
User Amount	Read only column which displays the transaction amount converted to user currency. If the currency used for the transaction amount is the same as the currency in the user amount, both fields will still be displayed.

4. List the purchase items for this opportunity by selecting the products and specifying the amounts on the table below.
5. Click the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates.
6. Click the Split icon in "Sales Credits" column to assign sales credits for the selected line item. When the salesperson association to the opportunity changes, the sales credit will also change (not necessary that two salespersons will have the same sales credits...) so, when you remove the salesperson from the org, the sales credits associated with that Salesperson also has to be removed.



7. Click **Update**.

Related Profiles

See Also Appendix A, "System Profile Options"

OS: Privilege to Change Opportunity Owner

There are two ways for an opportunity to change ownership:

- The specific owner of the opportunity goes into the application and selects another sales representative to own the opportunity and manually assigns to that person.
- A person with the profile "OS: Privilege to Change Opportunity Owner" set to "Yes", who has access to an opportunity, may go into the opportunity and change the owner to another member of the sales team, or another person from the sales organization that is in the system as a sales representative. If this

profile is set to "No", the person can only change owner on opportunities that they own.

This profile is explained in the *"Setting Up Users, Security, and Reporting Hierarchy"* section of the *Oracle Sales Online Implementation Guide*.

OS: Allow Updating Frozen Opportunities

- Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze check box selected.
- This profile can be set at either the responsibility or the user level.
- When set to *Y*, this profile option allows the user or responsibility to make changes. An *N* setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze check box is selected. This includes the Freeze check box itself.

  Profiles are explained in more detail in the the *Oracle Sales Online Implementation Guide*.

7.6 Viewing Opportunity Line Subtotals

On the opportunity detail page you can determine if you want to display a subtotal at the bottom of the purchase items page that shows the opportunity lines by interest type.

Navigation

Opportunity > Purchase Items

Steps

Assuming the profile is set to display the purchase line subtotal, you can view the details in the Purchase Items Summary section by scrolling to the section on the page, or clicking the Purchase Items navigation at the top of the page.

Related Profile Options

OS: Display Purchase Line Sub Total: If set to "Yes", displays the purchase line subtotal in the Purchase Items Summary section. The default is set to "No".

For information about setting profile options, refer to the *Oracle Sales Online Implementation Guide*.

7.7 Searching for an Opportunity

Select one of the saved searches from the pull down list, and click "Search" to view the resulting opportunities. Or, follow the steps outlined below to search for a specific opportunity or set of opportunities.

Navigation

Opportunity > Opportunities

Prerequisites

An opportunity must exist.

Steps

1. Search for the opportunity using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the opportunity by clicking the opportunity link.
3. Alternatively, select one of your saved searches and click **Go**.
4. Select from the list of opportunities for which you have access from the summary page displayed.
5. Click the opportunity link to view details.

7.8 Copying an Opportunity

You can copy an opportunity by following the steps outlined below. An updated feature allows you to name the new opportunity before copying the attributes from the existing opportunity.

Navigation

Opportunity > Opportunities

Prerequisites

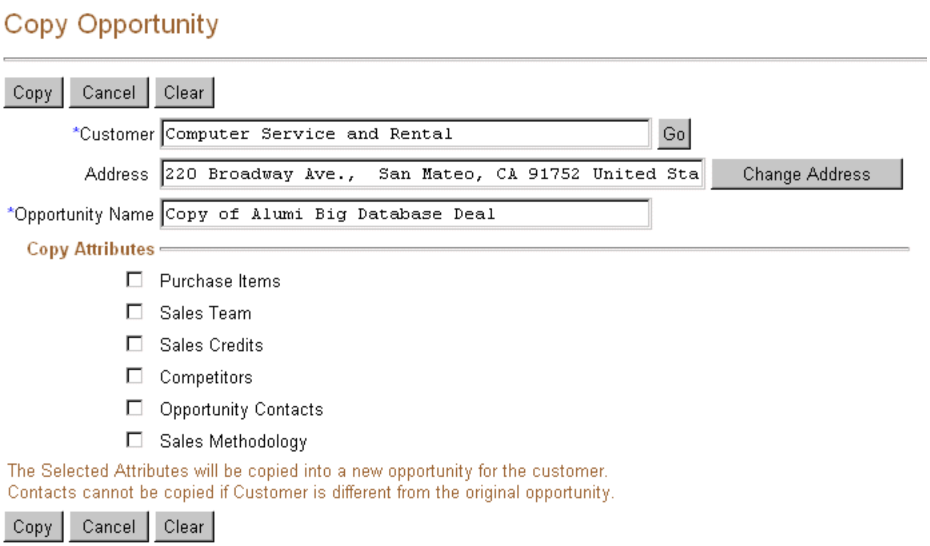
An opportunity must exist in order to make a copy.

Steps

1. Search for the opportunity using Chapter 3.2.1, "Using Quick Find or Advanced Search".

2. Select the opportunity by clicking the opportunity link.
3. Click **Copy**.

   The Copy Opportunity page opens.



   Copy Opportunity will create a new opportunity from this opportunity. You can select which attributes you want to copy by following the next steps.

4. Enter the Opportunity Name. This is the name that is used to identify and search for this opportunity.
5. Select the items to be copied by clicking the checkbox of each attribute:
   - Purchase Items
   - Sales Team
   - Sales Credits
   - Competitors
   - Opportunity Contacts
   - Sales Methodology
6. Click **Copy**.

The Selected Attributes will be copied into a new opportunity for the customer. Contacts and project will not be copied if Customer is different from the original opportunity.

7.9 Creating a Quote from an Opportunity

This feature allows you to create a quote from an opportunity. Creating a quote allows you to provide a customer with information relevant to making business decisions about this opportunity.

For more information about using quotes, please refer to the *Oracle Quoting User Guide*.

Navigation

Opportunity > Opportunities

Prerequisites

The customer for this opportunity must have a valid address as determined by the address validation process.

Steps

1. Search for the opportunity using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the opportunity by clicking the opportunity link.
3. Click **Create Quote**.

   The Create Quote page opens.

   The opportunity details are populated into the create quote page.
4. Enter the required fields:
   - Quote name: the name by which you want to refer to the quote.
   - Expiration date: select the date by which the quote will expire.
   - Primary salesperson: find the primary salesperson responsible for this quote.

   Several fields, such as Customer Name and Opportunity Name, will default from the information entered for the opportunity.
5. Optionally, enter the remaining fields.

6. Click **Apply**.

7.10 Creating a New Contact

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

Navigation

Opportunity > Opportunities > Contacts

Prerequisites

None

Steps

1. Search for the opportunity using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the opportunity by clicking the opportunity link.
3. Click **Contacts**.
4. Enter new information into the blank fields.
5. Optionally, to send collateral to this contact. Click **Send Collateral**.
6. Optionally, if there are multiple contacts, select the Primary radio to indicate that this is the primary contact. If this is the only contact, by default it will be considered the primary contact.
7. Optionally, indicate the opportunity role by selecting from the drop down list.
8. Click **Update**.

7.11 Sales Teams

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

See Also

- Section 7.11.1, "Adding a Sales Team Member"

- Section 7.11.2, "Adding a Partner to a Sales Team"
- Section 7.11.3, "Adding a Resource Team to a Sales Team"
- Section 7.11.4, "Removing a Sales Team Member"

Overview

The Sales Team is divided into two sections:

- Internal: Salespeople or internal users
- External: Partners and Partner users

  The partner and partner contacts can be added to the External Sales Team of an organization, lead, or opportunity if:

  - Partner has partner profile created.
  - Partner should be a sales partner in order to see partner contacts.
  - Partner contact should be a valid user and resource.
  - Partner needs to be added to the Sales team before the contact can be added.

You can use the filters listed below to find members on the sales team:

- Sales Group
- Sales person
- Territory Location
- Roles

Related Profiles

OS: Always Put Customer Creator on Sales Team

If set to Yes, will always add the creator of a customer to the sales team regardless of access privileges. If set to No, creator of customer will not automatically be added to the sales team.

OS: Privilege to Change Opp Owner

A user can change the owner of an opportunity if any of the conditions is met: If the profile mentioned above is set to Yes; The user is the current owner of the opportunity; or the owner of the opportunity is the user's subordinate.

For details about creating partners and partner contacts, please refer to the *Partners Online User Guide*.

7.11.1 Adding a Sales Team Member

Follow these steps to add a sales team member:

Navigation

Opportunity > Opportunities > Sales Team > Internal

Prerequisites

None

Steps

1. Search for the opportunity using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the opportunity by clicking the opportunity link.

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

7.11.2 Adding a Partner to a Sales Team

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

Navigation

Opportunity > Opportunities > Sales Team > External

Prerequisites

None

Steps

1. Search for the opportunity using Chapter 3.2.1, "Using Quick Find or Advanced Search".
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail general page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

Reference

Refer to the *Oracle Partners Online User Guide* for more information.

7.11.3 Adding a Resource Team to a Sales Team

Resource Teams can also be used to add sales persons to the sales team. The resource team is an independent list of users/sales persons identified by a team name. When you want to add the same set of users to several opportunities, using a resource team makes the process much faster. Resources teams are created and maintained in the CRM Foundation Resource Manager.

Navigation

Opportunity > Opportunities > Sales Team > Internal

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.

2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click **Sales Team**.
4. In the Add a Resource field, enter the resource name using % as a wildcard, click **Go**.
5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

For sales teams, if you add a sales person to the sales team using Add Resource Team, and if a resource team contains partners, then the partners will not appear in the internal sales team. Partner resources will appear in the external sales team. This applies to Leads, Opportunities, and Customers.

7.11.4 Removing a Sales Team Member

Follow these steps to remove a sales team member:

Navigation

Opportunity > Opportunities > Sales Team > Internal

Prerequisites

A sales team member must exist on the sales team.

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click **Sales Team**.
4. Locate the salesperson on the summary table and select the Remove check box.
5. Click **Update**.

7.12 Adding a Classification

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

Navigation

Opportunity > Select an Opportunity > Classification

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Select **Classification**.
4. Select a Classification from the drop down list that best describes your opportunity.
5. Optionally, enter comments.
6. Click **Update**.

   To remove a classification, click the remove icon, and click **Update**.

7.13 Linking an Opportunity to an Existing Lead

When a lead is converted to an opportunity, the sales team can be carried over to the opportunity. This helps to maintain the continuity of the sales team.

Navigation

Opportunity > Select an opportunity > Leads

Prerequisites

None

Related Profiles

OS: Linking Opportunity to Lead

There are three settings for this profile:

- 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. For the "Create Opportunity" function, after creating an opportunity, the opportunity is displayed on the detail page. A prompt appears that allows you to link to an existing lead (this is optional). Please note, if no leads exist, this prompt will not be displayed even if this setting is selected.

- Allowed

  If selected, allows the user to create a link to a lead through the Leads link on the Opportunity detail page.

- Not allowed

  If selected, does not allow users to create links to leads.

Please refer to the *Oracle Sales Online Implementation Guide* for information on setting profile options.

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. Click **Leads**.
4. Click **Link Opportunity to Lead**.

   The Link Opportunity to Lead page opens.
5. Select the Lead, or Leads, with which you want this opportunity linked by choosing the Select check box.
6. Click **Link to Lead(s)**.

You will see the message, "Confirmation - Your changes have been applied."

7.14 Adding a Key Competitor to an Existing Opportunity

Add information about the key competitor that you face with this opportunity.

Prerequisites

Oracle Marketing must be installed to use this feature.

Competitor products are created in Oracle Marketing. Here is an overview of some of the key steps in setting up competitor products:

Related Profiles

In Oracle Sales Online, the profile "OS: Competitor Required for Opportunity" governs whether a key competitor must be entered for the opportunity. If set to "Yes", key competitor is a required field and is marked with an asterisk.

Navigation in Oracle Sales Online

Opportunity > Opportunity

Steps

1. Select an existing opportunity from the opportunity summary page, or use Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.

   Since you are adding a key competitor to an existing opportunity, the opportunity detail page will have existing information. You can add additional information to the detail page while you add the key competitor information.
3. Use the Key Competitor drop down list to select a key competitor. This information comes from Oracle Marketing. If competitor products have not been established in Oracle Marketing, no data will appear in the drop down list.
4. Click **Update**.

7.15 Adding Decision Factors

Navigation

Opportunity > Opportunities

Steps

1. Select an existing opportunity.

2. In the Purchase Item table, click Add under the Competition column (this is only available if you have added a purchased item to the opportunity).
3. Enter a Factor, Customer Priority, and Rank.
4. Click **Update**.

7.16 Adding a Key Competitor While Creating an Opportunity

Navigation

Opportunity > Opportunities

Prerequisites

Oracle Marketing must be installed to use this feature.

The profile "OS: Competitor Required for Opportunity" governs whether a key competitor must be entered for the opportunity. If set to "Yes", key competitor is a required field and marked with an asterisk.

Steps

To add a key competitor while creating an opportunity, follow these steps:

1. Click **Create**.

   The first step in creating an opportunity is selecting the customer that is associated with the opportunity.

   1. In the Select a Customer field, enter the customer’s name. Use the % sign as a wildcard if you do not know the full name.
   2. Select the Country from the drop down list.
   3. Click **Go**.
   4. Select from the search results.

   Based on the customer that you’ve selected, many fields will populate automatically on the Create Opportunity page.

2. Enter information about the opportunity. Required fields are marked with an asterisk.

The profile "OS: Competitor Required for Opportunity" governs whether a key competitor must be entered for the opportunity. If set to "Yes", key competitor is a required field and marked with an asterisk. The error message "Key Competitor is a required field. Please enter a valid value" will appear if you do not select a key competitor.

3. Click **Create**.

7.17 Adding a Competitor at the Purchase Item Level

Navigation

Opportunity > Opportunities

Prerequisites

Oracle Marketing must be installed to use this feature.

Steps for Alternative 1

To add a competitor at the purchase item level, follow these steps:

1. Select an existing opportunity from the opportunity summary page, or use Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click **Competitors**.

   The competitors that you enter from these pages are related to the purchase line that you indicate. This competitor can be, but is not necessarily the key competitor.
4. Click **Add Competitors**.
5. Select the related purchase items that you want to add from the Purchase Items drop down list.
6. Select the competitor from the drop down list.
7. Select the competitor product from the drop down list. These products were specifically set up to be associated with this competitor.
8. A check box is provided so that you can indicate if this is a key competitor. If you select this check box, the opportunity detail page will automatically be updated with the new information.
9. Click **Add**.

Steps for Alternative 2

To add an additional competitor for a purchase item from the Purchase Item summary table, follow these steps:

1. Select an existing opportunity from the opportunity summary page, or use Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. In the Purchase Item summary table, click **Edit** in the Competitor column.
4. Enter competitor products and decision factors.
5. Click **Update**.

7.18 Tracking Win/Loss Information

The win/loss link is used to keep information about the status of an opportunity. You can track if the opportunity is in a Preliminary, Expired, Lost, No Opportunity, or Won status. Also, track information such as; Competitor Factors, Decision Factors, Other Issues (including Price, Scalability, Performance, and Support) and Reseller information.

Navigation

Opportunity > Opportunities > Win/Loss

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. Click **Win/Loss**.

   The Win/Loss page opens.
4. Select the Status from the drop down list. This is a required field.
5. Optionally, select a Close Reason from the drop down list.
6. Optionally, enter a Close Comment in the field.

7. Optionally, enter Competitor Products, Decision Factors, Other Issues, and Reseller Information.
8. Click **Update**.

After changing the win/loss indicator, the system administrator must run a complete refresh of as_sales_credit_denorm in order to see the changes.

7.19 Adding Multiple Purchase Items with the Same Product Category

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

Navigation

Opportunity > Opportunities

Prerequisites

None

Steps

Follow these steps to add a purchase item:

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. Click **Add Purchase Items**.

   The Opportunity Add Purchase Item page opens.
4. Select the Product Category from the drop down list.
5. Select an Inventory Item by entering a partial name, use the "%" key as a wild card, and click **Go**.
6. Enter the Quantity and Unit of Measure (UOM).
7. Enter the Amount, it is a required field.
8. Select a Campaign by entering a partial name, use the "%" key as a wild card, and click **Go**.
9. Enter the number of Purchase lines that you want to split your purchase lines into.

10. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.
11. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.
12. Click **Add** to create multiple purchase lines with forecast dates in above mentioned intervals.

You will see the new purchase lines on the opportunity detail page.

7.20 Viewing Opportunity History

In order to view the updates that are made to key opportunity fields, we have added a History link to the Opportunity General Page. This page is a read-only view that displays content from the opportunity audit table. To view the opportunity history information, click the History link.

7.21 Closing an Opportunity

In order to focus on the items related to winning or losing an opportunity, a separate page is used for closing an opportunity. Win/Loss information is used for Win Loss reporting.

Click the Close button to navigate to the Win/Loss subtab. In the general Closing Information area, the Opportunity Status values are limited to only the values identified as a won or lost type.

Competitor Products section allows tracking of the competitors by each purchase line item. There can be multiple competitors for each line item and the same competitor can be selected for multiple line items. The Won/Loss value can be selected for each competitor by purchase item. This is key for accurate win/loss reporting. You could win the sale of laptop computers against competitor ‘A’/laptop ‘X’, but loose the sale of desktop computers against competitor ‘B’/desktop ‘Y’.

Decision Factors of the customer are prioritized for each purchase item. These could include product features or price.

The Other Issues area is for tracking related obstacles/issues that contributed to the win or loss of the opportunity. These issues can be monitored throughout the sales process and closed as they are resolved with the customer.

Follow these steps to close an opportunity.

Navigation

Opportunity > Opportunity

Prerequisites

An opportunity must exist.

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. Click **Close**.
4. Change the opportunity status to a "closed" opportunity status. If you do not change the status, the opportunity will remain open.
5. Select a close reason. This is a required field.
6. Optionally, add comments.
7. Select a Win/Loss from the drop down list in the Competitor Product section.
8. Optionally, update the Decision Factor ranking.
9. Optionally, select Other Issues to further identify reasons for the win or loss of the opportunity.
10. Click **Update**.

7.22 Sales Credits

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

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

- Section 7.22.1, "Maintaining Sales Credits"
- Section 7.22.2, "Adding a Salesperson to Receive Sales Credits"

- Section 7.22.3, "Adding a Partner to Receive Sales Credits"

7.22.1 Maintaining Sales Credits

Follow these steps to split sales credits:

Navigation

Opportunity > Opportunities > Split

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. From the Purchase Items table, under the Amount column, click **Split**.
4. Choose Add a Salesperson or Add a Partner.
5. Enter the credit amount or percentage.
6. Click **Update**.

7.22.2 Adding a Salesperson to Receive Sales Credits

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

Navigation

Opportunity > Opportunities > Split

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. From the Purchase Items table, under the Amount column, click **Split**.

4. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
5. Select an employee by clicking the employee name link.

   To search for an employee outside your business group, select the business group from the drop down list, click **Go**.
6. Enter credit amount (forecast or other).

7.22.3 Adding a Partner to Receive Sales Credits

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

Navigation

Opportunity > Opportunities > Split

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. From the Purchase Items table, under the Amount column, click **Split**.
4. In the Add a Partner field, enter the name of the partner, and click **Go**.
5. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a "sales" partner.
6. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop down list and click **Update**.

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

7.23 Adding an Existing Contact to an Opportunity

Follow these steps to add an existing contact:

Navigation

Opportunity > Opportunities > Contacts

Prerequisites

A contact must exist.

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click **Contacts**.
4. Enter the last name in the Add a Person field to search for a contact, click **Go**.

   It is recommended that you search by last name only. This will search for people which have already established a relationship with this customer called contacts.
5. From the Select a Person page, choose from the list of search results by clicking the relationship link.

If you cannot find the person you are looking for, you can widen your search to look for all people checking the "Search All People" radio button.

If you select a person that does not have an existing relationship with this customer, you can choose a relationship type.

7.24 Notes

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

- Section 7.24.1, "Creating Notes"
- Section 7.24.2, "Viewing Notes"

7.24.1 Creating Notes

Follow these steps to create a note:

Navigation

Opportunity > Opportunities > Notes

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.
3. Click **Notes**.
4. Select a Type from the drop down list.

   You can change the default type using Profiles.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the Text box.
7. Click **Create**.

Note: You cannot edit notes once they are created.

7.24.2 Viewing Notes

Follow these steps to view a note:

Navigation

Opportunity > Opportunities > Notes

Prerequisites

A note must exist.

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The **Opportunity Detail** page opens.
3. Click the **Notes** link.

4. Select a Type from the drop down list.

   The default type can be changed using Profiles.

5. Choose the number of days for which you want the notes history.

6. Click **Apply**.

7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.

8. To view all notes in a printer-friendly format, click **All Notes**.

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

7.25 Tasks

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

- Section 7.25.1, "Creating a Task"
- Section 7.25.2, "Adding an Attachment to a Task"
- Section 7.25.3, "Maintaining a Task"

7.25.1 Creating a Task

Navigation

Opportunity > Opportunities > Tasks

Prerequisites

None

Steps

Follow these steps to create a task:

1. Search for the opportunity using Using Quick Find or Advanced Search.

2. Select the opportunity by clicking the opportunity link.

The Opportunity Detail page opens.

3. Click **Tasks**.
4. Click **Create**.
5. Select **Task Type** from the drop down list.
6. If the task is a private task, select the "**Private**" box. You can assign this task to yourself only.
7. Enter the **Task Name**.
8. Enter the **Task Description**.
9. Choose the **Priority** from the drop down list.
10. Select the **Status** from the drop down list.
11. Select a planned start date by clicking the Calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the person you are assigning to the task; click **Go**.
14. The "**Relate to**" field is defaulted to the opportunity with which you are working, however, you can edit this field.
15. Click **Create**.

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

7.25.2 Adding an Attachment to a Task

Navigation

Opportunity > Opportunities > Tasks

Prerequisites

A task must exist.

Steps

Follow these steps to add an attachment to your task:

1. Search for the opportunity using Using Quick Find or Advanced Search.

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

   The **Add Attachment** page opens.
5. Enter a description, and choose a **Text**, **File**, or **URL** attachment.
6. On your desktop, click **Browse** to search for a file to attach.
7. Click **Create**.

7.25.3 Maintaining a Task

Follow these steps to maintain a task:

Navigation

Opportunity > Opportunities > Tasks

Prerequisites

A task must exist.

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click **Tasks**.
4. Add or update information.
5. Click **Update**.

7.26 Attachments

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

- Section 7.26.1, "Adding an Attachment"

- Section 7.26.2, "Viewing an Existing Attachment"

7.26.1 Adding an Attachment

Navigation

Opportunity > Opportunities > Attachments

Prerequisites

None

Steps

1. Search for the opportunity using Using Quick Find or Advanced Search.
2. Select the opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.
3. Click **Attachments**.
4. Click **Add**.

   The Add Attachment page opens.
5. Enter a description, and click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

7.26.2 Viewing an Existing Attachment

Navigation

Opportunity > Opportunities > Attachments

Prerequisites

An attachment must exist.

Steps

To view an existing attachment, search for the opportunity for which you want to view the attachment using Using Quick Find or Advanced Search on page 3-2. Click the attachment link.

7.27 Opportunity Reports

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

- Section 7.27.1, "Viewing Opportunity Summary Report"
- Section 7.27.2, "Viewing Opportunity Summary Report by Group"
- Section 7.27.3, "Viewing Opportunity Detail Report"
- Section 7.27.4, "Viewing Opportunity Access Report"
- Section 7.27.5, "Viewing Opportunity Progression Dashboard"
- Section 7.27.6, "Viewing Opportunity Classification Report"
- Section 7.27.7, "Viewing Opportunity Aging Report"
- Section 7.27.8, "Viewing Opportunity Aging by Status Report"
-

Downloading Reports

To download any of the opportunity reports into a spreadsheet, click the Export button.

Partner Information

For partner information, please note that the partner information is only displayed if the partner is a part of the sales hierarchy.

Setup Information

For implementation information on setting up profiles that govern these reports, see the *Oracle Sales Online Implementation Guide, section "Setting Up Opportunities and Forecasting"*.

7.27.1 Viewing Opportunity Summary Report

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

Navigation

Opportunity > Reports > Opportunity Summary Report

Prerequisites

None

Steps

Follow these steps to view the Opportunity Summary report:

1. Click the **Opportunity Summary Report** link.
2. Select the filter options.

> **Note:** In comparison to the project list of values (LOV) on the Opportunity detail page, which is for a specific customer, this report filters by project text across various opportunities and customers. It is a free format text field used for filtering.

3. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the **>** button.

   To move all available columns into the display columns section click the >> button.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

7.27.2 Viewing Opportunity Summary Report by Group

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

Navigation

Opportunity > Reports > Opportunity Summary Report by Group

Prerequisites

None

Steps

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

1. Click the **Opportunity Summary Report by Group** link.
2. Select the filter options to fit your needs.
3. Select the display options.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.
   3. **Run Report**: to run the report without saving the report.
   4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

7.27.3 Viewing Opportunity Detail Report

This report provides a detailed listing of the selected opportunities.

Navigation

Opportunity > Reports > Opportunity Detail Report

Prerequisites

None

Steps

Follow these steps to view the Opportunity Detail report:

1. Click the **Opportunity Detail Report** link.
2. Select the filter options.
3. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

   To move all available columns into the display columns section click the >> button.

In the Save Report section, click:

   1. **Save**: to save the report.

2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

7.27.4 Viewing Opportunity Access Report

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

Navigation

Opportunity > Reports > Opportunity Access Report

Prerequisites

None

Steps

Follow these steps to view the Opportunity Access report:

1. Click the **Opportunity Access Report** link.
2. Select the filter options.
3. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click **>**.

   To move all available columns into the display columns section click >>.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

4. Select "Use as Report Default" check box to use the report as a default.

7.27.5 Viewing Opportunity Progression Dashboard

The purpose of progression dashboard is to provide a tool for Oracle Sales Online users to track the completion of predefined tasks for opportunities following a particular sales methodology. Listed below are the situations in which the progression dashboard does not show data. These assumptions were made to improve query performance and also because the user can use the opportunity summary report if he/she wants a complete list of opportunities.

- Opportunities that do not have any sales methodology selected will not be shown even if the user has sales credit to them.
- Opportunities that do not have any tasks created automatically by the sales methodology workflow even if they have a particular sales methodology selected will not be shown. As a fallout of this assumption, if the sales stages of a methodology do not have any task templates assigned to them, no tasks are created automatically and hence no opportunities are shown for these sales methodologies.
- If a sales stage of an opportunity does not have any task template group mapped to it, those sales stages are not displayed in the report. This report provides a list of tasks for each opportunity by sales methodology.

Navigation

Opportunity > Reports > Opportunity Progression Dashboard

Prerequisites

None

Steps

Follow these steps to view the Opportunity Progression report:

1. Click the **Opportunity Progression Report** link.

   The Opportunity Progression Dashboard opens.

2. Select filters.
3. Select display options.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.

3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

4. Select "Use as Report Default" check box to use the report as a default.

7.27.6 Viewing Opportunity Classification Report

This report provides opportunities by classification. Classifications are established by a system administrator during application implementation or through the Administration tab.

Navigation

Opportunity > Reports > Opportunity Classification Report

Prerequisites

None

Steps

Follow these steps to view the Opportunity Classification report:

1. Click the **Opportunity Classification Report** link.
2. Select filters.
3. Select display options.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

4. Select "Use as Report Default" check box to use the report as a default.

7.27.7 Viewing Opportunity Aging Report

This report provides the ability to view a list of opportunities and compare aging trends based on the close date of the opportunity.

Navigation

Opportunity > Reports > Opportunity Aging Report

Prerequisites

None

Steps

Follow these steps to view the Opportunity Aging report:

1. Click the **Opportunity Aging Report** link.
2. Select filters.
3. Select display options.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.
   3. **Run Report**: to run the report without saving the report.
   4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

4. Select "Use as Report Default" check box to use the report as a default.

7.27.8 Viewing Opportunity Aging by Status Report

This report provides the ability to view a list of opportunities and compare aging trends based on the different statuses that the opportunity has been through during the sales cycle.

Navigation

Opportunity > Reports > Opportunity Aging by Status Report

Prerequisites

None

Steps

Follow these steps to view the Opportunity Aging by Status report:

1. Click the **Opportunity Aging by Status Report** link.

2. Select filters.
3. Select display options.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.
   3. **Run Report**: to run the report without saving the report.
   4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

4. Select "Use as Report Default" check box to use the report as a default.

7.27.9 Viewing Opportunity by Product Report

The Opportunity by Products report gives sales representatives, sales managers, and sales executives the ability to view a list of opportunities based on the Product Categories and / or Products that are included in the opportunity lines.

Navigation

Opportunity > Reports > Opportunity by Product Report

Prerequisites

None

Steps

Follow these steps to view the report:

1. Click the **Opportunity by Product Report** link.
2. Select filters.
3. Select display options.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.
   3. **Run Report**: to run the report without saving the report.

4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

4. Select "Use as Report Default" check box to use the report as a default.

7.27.10 Viewing My Reports and Charts

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

You can view the following charts:

- Section 7.27.11, "Viewing Opportunity Chart by Close Date"
- Section 7.27.12, "Viewing Opportunity Chart by Status"
- Section 7.27.13, "Viewing Opportunity Chart by Win Probability"

7.27.11 Viewing Opportunity Chart by Close Date

Navigation

Opportunity > Reports

Prerequisites

None

Steps

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

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

7.27.12 Viewing Opportunity Chart by Status

Navigation

Opportunity > Reports

Prerequisites

None

Steps

To view opportunity chart by status, follow these steps:

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

7.27.13 Viewing Opportunity Chart by Win Probability

Navigation

Opportunity > Reports

Prerequisites

None

Steps

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

1. In the Charts section, select the Opportunity Chart by Win Probability from the drop down list.
2. Select the chart style from the drop down list.
3. Select the chart dimension from the drop down list.

4. Select the period type from the drop down list.
5. Select the start and end periods from the drop down lists.
6. Select the chart number from the drop down list.
7. Click **Run** to see the chart.

8 Quote Tab

Sections in this chapter include:

- Section 8.1, "Overview of the Quote Tab"
- Section 8.2, "Creating Quotes"

8.1 Overview of the Quote Tab

This topic covers the basic elements of quoting which relate to creating and processing a quote from an opportunity as it applies to this application. Detailed quoting information is available in the *Oracle Quoting User Guide*.

Some of the functions available are:

- Section 8.2, "Creating Quotes"
- Creating versions of the same quote: You can create a new quote version from any existing quote version that does not have a status of ordered or inactive. Oracle HTML Quoting numbers the versions of a single quote sequentially. For example, if you create a new quote version from Version 5 of 10, the new version is numbered as Version 11 of 11. When you create a new quote version from an existing quote version, all header and line information is carried over to the new quote version.
- Making pricing adjustments: Depending on permissions, Oracle HTML Quoting enables sales reps to adjust prices in order to present more competitive quotes. Some pricing adjustments can be applied to items and/or to the entire quote.
- Making manual price overrides: Based on the sales person's role, you can override item prices manually at the line level. You can override a line item's unit net price or the item's total price. You cannot make a manual price override

that results in a negative price for the unit net price, the item total price, or the order subtotal.

- Promotional Discounts: Oracle HTML Quoting allows you to enter promotion codes (also known as "offer codes") to capture automatic discounts set up in the Oracle Pricing engine.
- Trade-In Credits: If your merchant organization provides credit to customers for returning or decommissioning existing products when they purchase new products, you can add a customer's trade-in items to a quote.

  Sales representatives add trade-in items to a quote by performing a product search for the items, adding the items to the quote, and marking their line type as a Line Category of Return. When the application calculates the order total, it treats the prices of trade-in items as credits, and subtracts them from the order total.
- Pricing Agreements: When creating a quote, you can select a pricing agreement. The Quote Detail-Pricing Agreements page displays all pricing agreements specific to the sold-to customer and all universal pricing agreements. You can choose which pricing agreement to apply when pricing a quote.
- Processing a Quote to an Order: Entering shipping details is the first step of transforming a quote into an order. When you choose a ship-to customer, you can choose either from a list of all existing customers or from a list of only those customers who have a shipping relationship with the sold-to customer, depending on your permissions.

  When you choose a bill-to customer, you can choose either from a list of all existing customers or from a list of only those customers who have a billing relationship with the sold-to customer, depending on your permissions.

Related Profiles

OSO: Enable Quotes

ASO: Enable OSO Integration

MO: Operating Unit (optional)

IBE: Use Price List Associated to Specialty Store (optional)

Reference

For detailed instructions on how to work with quotes, please refer to the *Oracle Quoting User Guide*.

8.2 Creating Quotes

A quote can be created from an opportunity, as an entirely new quote or as a copy of an existing quote.

When creating a quote from an opportunity, the customer, name and line items are copied from the opportunity to the quote. The Quote is assigned to the salesperson who creates the quote, with 100% of the credits. Only the person creating the quote will have access to update the quote. The opportunity line items must include an inventory item before creating the quote.

When you create a standalone quote, you must initially specify the sold-to customer, the quote name, and the expiration date. For a new quote, the version number is always "1" and the status is "Drafted". The quote is assigned to the salesperson who creates the quote, with 100% of the credits. The quote name, quote number, sold-to customer, and sales representative assignment cannot be changed after they are set.

Creating a Quote from an Opportunity

1. Click the Opportunity Tab, and select an opportunity.
2. From the Opportunity Detail screen, click the **Create Quote** button
3. The opportunity information is used to built a new quote. The Quote Detail Item screen is displayed. A link is built between the opportunity and the quote.

Creating a Standalone Quote

Creating a standalone quote is similar to creating an opportunity. You must select a customer, enter a quote name and add inventory items.

Reference

For detailed instructions on how to work with quotes, please refer to the *Oracle Quoting User Guide.*

9

Forecast Tab

Sections in this chapter include:

9.1 Overview of the Forecast Tab

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

Overview of 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.

Worksheets

Opportunity Worksheet: Opportunity-level forecasting provides a tool for salespeople to create their own view, and their own commitment, of the opportunities with which their salespeople are working. Opportunity forecasting also gives salespeople the ability to review, adjust, and commit, at a more detailed product category level.

Product Category Worksheet: Forecasting at product category level gives salespeople an easy way to view their pipeline aggregated into product groupings. This allows salespeople to generate product-level forecasts.

Two Views of Forecast

The salesperson view is only their personal view of their forecast. They can create and update worksheets, and submit the forecast to their manager.

The manager view includes the salesperson view, plus a listing of all subordinate forecasts. The manager can drill down on each of the subordinate forecasts to view the details.

Overview of Multi-Currency

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.

For all users the currency is converted for their forecasts. For managers and administrators, when they view subordinates opportunity or product category worksheets it shows the amount in the currency that was submitted.

Pipeline Default Calculations

This functionality is related to the profile "Default New Rows in Worksheet To". If you set the Default New Rows in Worksheet To, equal to Pipeline, then this Pipeline Calculation Using profile will determine if you use System Defaults or Win Probability Based Defaults.

System Defaults

Previously Saved Values (default): If you are forecasting for the first time, the value is based on the Sales Online profile preferences. If you have saved an product category worksheet, those values will be the default.

Pipeline Default Amounts: This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

Pipeline defaults use the following criteria:

- **Worst Case:** Total Won Amount=Sum of all won opportunities
- **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
- **Best Case:** Total sum of all open opportunities

Win Probability Based Defaults

An example:

If the profile "Default New Rows in Worksheet To" is set to "Pipeline", and Worst case equals total dollars from opportunities with a win probability >=80% then Forecast equals total dollars from opportunities with win probability >=60% and Best case equals total dollars from opportunities with win probability >=40%.

For all Open Opportunities with a win probability between 80-100:

- Best case = total opportunity amount
- Forecast = total opportunity amount
- Worst Case = opportunity amount

Win probability 60-79:

- Best Case = opportunity Amount
- Forecast = opportunity Amount
- Worst case = 0

Win probability 40-59:

- Best case = opportunity Amount
- Forecast = 0
- Worst case = 0

Win probability 0-39:

- Best case = 0
- Forecast = 0
- Worst case = 0

For an opportunity which is in won status, regardless of the win probability:

- Best case = opportunity amount
- Forecast = opportunity amount
- Worst case = opportunity amount

See Also

Section 3.5.5, "Setting Forecast Profiles"

9.2 Creating and Submitting Forecasts

Navigation

Forecast > Forecast

Prerequisites

None

Steps

Follow these steps to create and submit Forecasts:

1. Select the Group, Period Type and Name, Forecast Category, and Credit Type.
2. Click **Apply** to see the results in the table below.
3. Update Best Case, Forecast, and Worst Case values with the amounts that you want to submit to management.
4. Click **Submit Forecast and Worksheets** to submit your forecast values.

Warning: When using the auto submit worksheet feature, any saved worksheets are overwritten with the defaults.

9.3 Automatically Submitting Worksheets

Sales Managers and Sales Representatives can automatically submit worksheets by setting the profile option "Auto Submit Forecast Worksheets" to None, Opportunity, Product Category, or Both. In accordance with your profile preferences for "Auto Submit Worksheets" you will submit worksheets according to preferences outlined in the table below. The profile setting "Default Worksheet Values to" is used to default data into the worksheets. A message, located on the main Forecast page, reflects your current profile settings.

Navigation

Profiles > Sales Online Preferences > Forecasting

Prerequisites

You must set profile preferences.

Steps

Follow these steps to set up automatic submission of worksheets:

1. From the Autosubmit Worksheet drop down list, select your preferences.
2. Click **Update**.

The following table describes the Auto Submit Profiles.

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

9.4 Viewing Forecast History

Navigation

Forecast > View Forecast History

Prerequisite

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

Steps

Click the **View Forecast History** button to view either worksheet.

9.5 Adding an Attachment

Use this feature to provide related information about your forecast to your manager.

Navigation

Forecast > Forecast > Attachments

Prerequisite

A forecast must already exist.

Steps

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

1. Select an existing forecast.
2. Click the **Attachments** link.
3. Click **Add**.

   The Add Attachment page opens.
4. Enter a description, click **Text**, **File**, or **URL**.
5. Enter Text, click Browse to search for the document, or enter the URL.
6. Click **Create**.

Attachments are submitted to your manager along with your forecast numbers and can be viewed by your manager in the subordinate section of the main forecast page.

9.6 Adding a Note

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

Navigation

Forecast > Forecast > Notes

Prerequisites

A forecast must already exist.

Steps

Follow these steps to add a note:

1. Select an existing forecast.
2. Click **Notes**.
3. Select a **Type** from the drop down list.

   You can change the default type by changing the forecasting profile preferences.
4. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
5. Enter your notes in the text box.
6. Click **Create**.

Forecast Notes are submitted to management along with forecast numbers.

Note: You cannot edit notes once they are created.

9.7 Linking to Compensation

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

Navigation

Forecast > Compensation

Prerequisites

Oracle Incentive Compensation must be installed to use this feature.

Please refer to the *Oracle Incentive Compensation User Guide* guide for more information.

Steps

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

In order for the employee number to appear, a salesperson number must be assigned when creating the user.

9.8 Opportunity Worksheet

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

- Section 9.8.1, "Creating Opportunity Level Forecasts Using Opportunity Worksheets"

See Also

- Section 9.9, "Personalizing Opportunity Worksheet Table"
- Section 9.11.1, "Creating Product Level Forecasts Using Product Category Worksheets"

9.8.1 Creating Opportunity Level Forecasts Using Opportunity Worksheets

You can view opportunities at a more detailed level by viewing the product categories that make up the opportunity. This functionality is turned off or on by setting the related profile, OS: Allow Opportunity Forecast by Product Category. Refer to the *Oracle Sales Online Implementation Guide* for information about "Setting Profile Options".

Navigation

Forecast > Opportunity

Prerequisites

None

Steps

Follow these steps to create opportunity worksheets:

1. From the drop down list select the Sales Group for which you want to forecast.
2. Select the Period Type and Period Name from the drop down lists.
3. Select the Forecast Category from the drop down list.
4. Select the Credit Type.
5. From the "Create Worksheet Using" radio buttons, select one of the following options:

   Previously Saved Values (default): If you are forecasting for the first time, the value is based on the Sales Online profile preferences. If you have saved an opportunity worksheet, those values will be the default.

   Pipeline Default Amounts: This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

   If you have set up the Forecast profile, "Default New Rows in Worksheet" equal to Pipeline. See Pipeline Default Calculations on page 9-3.

   Subordinate Submitted Values: This includes values submitted by Subordinates. If there are no "current" subordinate submitted values, the values will default to zero." If thresholds are used by a subordinate, this value will always default to zero.

Please note, only managers are allowed to create worksheets using subordinate submitted values.

6. Click **Apply**.

   The page is refreshed with all the opportunities within your pipeline which are forecastable.

   The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.

   You can adjust the amounts in these fields to reflect your sales commitment.

7. Click **Save**.

The forecast will not be submitted by saving the worksheet, you must click the Submit Forecast and Worksheets button in the Forecast Main page.

Related Profiles

"**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.

See Also Appendix A.1, "Setting System Profile Options"

9.9 Personalizing Opportunity Worksheet Table

Navigation

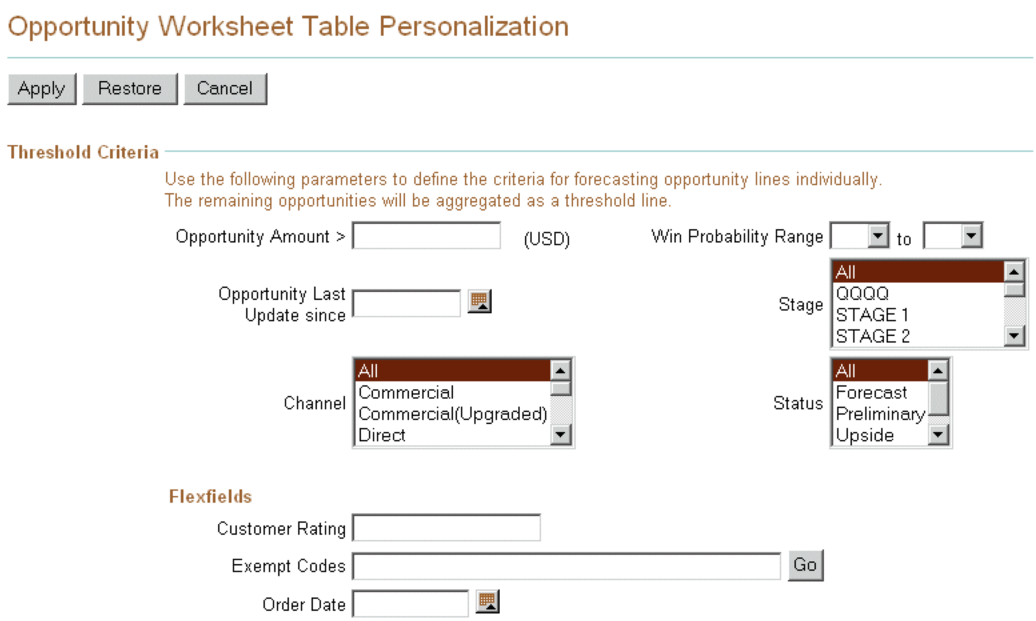
Forecast > Opportunity > Personalize Icon

Prerequisites

None

Steps

Use the following parameters to define the criteria for forecasting opportunity lines individually. The remaining opportunities will be aggregated as a threshold line.



1. Select parameters.

   If "All" is selected for the columns, it means that there is no filter applied and footnotes will not appear for columns unless you specifically indicate some value.

2. Select display options.

   If Product Category level forecasting is enabled, the following columns are not included in sort options:

   - Close Date
   - Stage
   - Status
   - Opportunity Amount
   - Win Probability
   - Weighted Amount

3. Select the order in which to display data.

4. Enter the number of rows to be displayed per page.
5. Click **Apply**.

9.10 Forecast Threshold Overview

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

Thresholds are amounts and are used along with your forecast currency. Changing your currency does not convert the threshold. If you change your currency for forecasting, you must set the threshold amount accordingly.

A basic example:

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

Opportunity #1 = $10,000.00

Opportunity #2 = $ 5,000.00

Opportunity #3 = $ 4,000.00

Opportunity #4 = $ 2,000.00

Opportunity #5 = $ 1,000.00

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

Opportunity #1 = $10,000.00

Opportunity #2 = $ 5,000.00

Opportunities Below Threshold = $ 7,000.00 (opportunities equal to or below the threshold combined 3, 4, and 5)

Please note, "blank" threshold value means the threshold feature is not being used. A "0" threshold value indicates the threshold feature is being used and opportunities with negative amounts will fall within the threshold line calculation.

In other words, 0 is a valid threshold value since you can have opportunities with negative amounts. If you enter a negative amount in the threshold line, the forecast credit is not split for the won opportunity under the threshold line.

Prerequisites

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

- Set by the user:

  "OSO: Opportunity Worksheet Threshold Amount" to set the threshold amount. For example, enter amount > 10,000. The threshold line is calculated using all opportunities which are <= 10,000.

  1. Click the **Profile** icon.
  2. Click the **Forecast** link.
  3. Enter the amount you want to include as your forecast threshold in the "Opportunity Worksheet Threshold Amount" field.
  4. Click **Update**.

- Set by the System Administrator (optional):

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

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

See Also

- Section 9.10.1, "Defining Your Forecast Threshold"
- Section 9.10.2, "Viewing Opportunities Included in the Forecast"
- Section 9.10.3, "Viewing Threshold History"
- Section 9.10.4, "Viewing Subordinate's Threshold Details"

9.10.1 Defining Your Forecast Threshold

The application provides a flexible way to generate opportunity level forecasts. The current opportunity worksheet provides the ability to forecast on all opportunities. The new opportunity worksheet will allow users to decide which opportunities they want to forecast individually and which opportunities they want to provide an aggregate forecast. To achieve this the opportunity worksheet will have parameters allowing each user to specify criteria for aggregating opportunities.

The available parameters:

- Sales Channel
- Sales Stage
- Total forecastable amount <= a certain amount based on the forecast currency
- All opportunities that fall within a particular win probability range
- Flexfields which are available on the opportunity

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

Prerequisites

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

If set to "Yes", users click the link "Opportunities Below Threshold" to view a listing of all opportunities which fall below the threshold criteria that is established. If set to "No", then the link is not available but you can still submit forecast for the threshold line.

Steps

1. Click **Profile**.
2. Click **Forecast**.
3. Enter the amount you want to include as your forecast threshold in the "Opportunity Worksheet Threshold Amount" field.

   - A positive value in this field means threshold is turned on and will sum all rows with this amount or lower into one summary line.

- A null value assumes the feature is not being used and the application works as is, without a threshold set.
- A zero value is treated as a threshold value and will sum all rows with a zero or negative value into one summary line.

4. Click **Update**.

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

9.10.2 Viewing Opportunities Included in the Forecast

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

Prerequisites

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

Navigation

Forecast > Opportunity > Apply > Opportunities below Threshold

Steps

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

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

9.10.3 Viewing Threshold History

You can view the history of submitted threshold rows.

Prerequisites

A forecast threshold and history must exist.

Navigation

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View

Steps

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

9.10.4 Viewing Subordinate’s Threshold Details

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

Prerequisites

You must be logged in as a manager.

Navigation

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

Steps

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

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

9.11 Product Category Worksheet

Product Category Worksheet is a tool to view your pipeline aggregated into product categories and prepare product level forecasts.

- Section 9.11.1, "Creating Product Level Forecasts Using Product Category Worksheets"

9.11.1 Creating Product Level Forecasts Using Product Category Worksheets

Navigation

Forecast > Product Category

Prerequisites

None

Steps

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

Update Best Case, Forecast, and Worst Case amounts and click "Save". The values you save on this page will appear under the Forecast subtab to assist you in creating your forecast. Percentage is not calculated if using subordinate submitted values to create a worksheet.

1. From the drop down list select the Sales Group for which you want to forecast.
2. Select the Period Type and Period Name from the drop down lists.
3. Select the Forecast Category from the drop down list.
4. Select the Credit Type.
5. Click **Apply**.
6. Update Best Case, Forecast, and Worst Case amounts.
7. Click **Save** to save your worksheet.

The forecast will not be submitted by saving the worksheet, you must click the Submit button.

9.12 Viewing Product Category History

Overview

Product Category history has added filters to view these pages. In previous releases, the history showed you a list of all previously submitted forecasts for all users for a particular product category or opportunity. All records were visible to all sales representatives regardless of sales group structure, forecast period, forecast category, or credit type.

The following filters are used for the Product Category History screen:

For a Subordinate:

- Sales Group
- Sales Person
- Period
- Forecast Category
- Credit Type
- Product Category

For a Manager:

- Sales Group
- Period
- Forecast Category
- Credit Type
- Product Category

Additionally, the manager view includes forecast submissions for all sales representatives reporting to the manager.

Navigation

Forecast > Product Category

Prerequisites

Previous product category forecasts must have been submitted.

Steps

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

1. Click **Product Category Worksheet**.
2. Click **History**, to view the history of all previous forecast submissions for this product category.

   Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted.

9.13 Viewing Opportunity History

Overview

Opportunity history has added filters to view these pages. In previous releases, the history showed you a list of all previously submitted forecasts for all users for a particular product category or opportunity. All records were visible to all sales representatives regardless of sales group structure, forecast period, forecast category, or credit type.

The following filters are used for the Opportunity History screen:

For a Subordinate:

- Sales Group
- Sales Person
- Period
- Forecast Category
- Credit Type
- Opportunity

For a Manager:

- Sales Group
- Period
- Forecast Category
- Credit Type
- Opportunity

Additionally, the manager view includes forecast submissions for all sales representatives reporting to the manager.

Navigation

Forecast > Opportunity

Prerequisites

Previous opportunity forecasts must have been submitted.

Steps

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

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

9.14 Quick Forecast

Under the Forecast tab, you will find the Quick Forecast subtab. Sales representatives can generate forecasts for multiple periods directly from the pipeline. The forecast profile options control whether the opportunity or product category worksheet is created, or both are created. The goal of this feature is to reduce the time it takes to create and submit the forecast.

Please note, resources that have been assigned a manager role in a group will not be able to use this feature. If assigned a manager role, you will receive the following error message when you click the Generate Forecast subtab: *"You do not have access to generate forecast."* However, this does not mean that a manager cannot submit forecasts, only that they cannot use the quick forecast feature.

Navigation

Forecast > Quick Forecast

Prerequisites

See Appendix A.1, "Setting System Profile Options" for information about profiles:

- OSO: Forecast Max Generate Months.
- OSO: Default Worksheet Values
- OSO: Auto Submit Worksheets

Steps

Follow these steps:

The Generate Forecast for Multiple Periods page opens.

1. From the **Sales Group** section, select a sales group from the drop down list.
2. From the Forecast section, select the **Period Type** from the drop down list.
3. Select the "**From Period**" and "**To Period**" from the drop down lists.
4. Select the **Category** from the drop down list.
5. Select the **Credit Type** from the drop down list.
6. Click **View**.

9.15 Forecast Reports

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

- Section 9.15.1, "Viewing Forecast History Report"
- Section 9.15.2, "Viewing Forecast Comparison Report"
- Section 9.15.3, "Viewing Forecast Summary Report by Product Category"
- Section 9.15.4, "Viewing Forecast Accuracy Report"
- Section 9.15.5, "Viewing Forecast to Pipeline Summary Report"
- Section 9.15.6, "Viewing Forecast Summary Report"
- Section 9.15.7, "Viewing Forecast Progression Report"
- Section 9.15.8, "Creating a Report"
- Section 9.15.9, "Viewing Forecast History (Self) Chart"
- Section 9.15.10, "Viewing Forecast History (Subordinates) Chart"

9.15.1 Viewing Forecast History Report

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

Navigation

Forecast > Reports > Forecast History Report

Prerequisites

None

Steps

Follow these steps to view the Forecast History Report:

Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the "Period" from the drop down list, then select "To" from the drop down list.
3. Select from the Forecast Category drop down list.
4. Select the Sales Group from the drop down list.
5. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking **Go**.
6. Select a Credit Type from the drop down list.

Display Options

7. Select the Reporting Currency from the drop down list.
8. Select your Scaling options.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.

4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

9. Select the Display on Home Page button to display the report on your home page.

   Please note, if you select the Display on Homepage check box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

10. Click the **Download Report** icon, to download the report.

9.15.2 Viewing Forecast Comparison Report

This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet. Please note, only submitted forecasts are included in this report.

Navigation

Forecast > Reports > Forecast Comparison Report

Prerequisites

None

Steps

Follow these steps to view the Forecast Comparison Report:

General

1. Select the Forecast Category that you want to include in your report. Forecast Category is always considered as a filter.
2. Select the Credit Type that you want to include in your report.

Forecast 1

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select the Sales Group from the drop down list.

4. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking **Go**. Managers can run this report for Sales Group or Sales people. Sales people can run this report only for themselves.

Forecast 2

5. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
6. Select the Period from the drop down list.
7. Select the Sales Group from the drop down list.
8. Search for a Salesperson by typing in a name, or partial name, and clicking **Go**.

Display Options

9. Select the "Display most recent forecast for period" or "Display all submitted forecasts for period" as desired.
10. Select Reporting Currency.
11. Select Scaling.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.
   3. **Run Report**: to run the report without saving the report.
   4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

12. If you want to display the report on your home page, select the check box.

    If you select the Display on Homepage check box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

9.15.3 Viewing Forecast Summary Report by Product Category

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

With regard to threshold functionality for this report, it is different (and opposite) of the new threshold functionality in the opportunity worksheets.

Example:

In the report, when you choose "<= 1000", it will display each opportunity that is less than or equal to 1000, and will rollup all other opportunities into the threshold amount row indicated by "Totals > 1000" (meaning all others greater than 1000).

In forecast worksheet, opportunities less than or equal to 1000, are rolled up into the threshold record.

Opportunities are included in the report based on the sales group selected. The sales group that you select is used as the top level (starting point) for showing opportunities. Selecting a particular worksheet "level" will show all forecast values for the groups at that level. To filter (reduce) the number of oppties displayed choose a lower sales group as a starting point.

Navigation

Forecast > Reports > Forecast Summary Report by Product Category

Prerequisites

None

Steps

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

From the Create Forecast Summary by Product Category Report page select the options that you want to include in your report.

Filters

Under the Filters section you can select from any of the following filters.

1. Select the Period Type from the drop down list. This is the period for which you want the report to return data.
2. Select the Period for which you want to run the report.
3. Select the Credit Type.
4. Select the radio button for either using Forecast Category or Product Category as a filter.
5. Select a Sales Stage, if applicable.

6. Select a Win Probability from the drop down lists, if applicable.
7. Select an Operating Unit, if applicable.
8. Enter an Opportunity Name, if applicable.
9. Select a Threshold Amount.
10. Select a Sales Group, if you want to filter your report using this criteria.
11. Enter a Salesperson full or partial name and click **Go**.
12. Select a Customer Category, if applicable.
13. Select a Channel from the list of values.
14. Select a Status from the list of values.
15. Enter a project name to use as a filter, if applicable.

Display Options

Under the Display Options, you can select from the following choices:

1. Select a Reporting Currency from the drop down list.
2. Select a Product Category by selecting the radio button.
3. Select the "Exclude deals where all forecast amounts are 0.00" if you want to exclude those items.
4. Select a Worksheet Type from the drop down list. The drop down values will display the sales group levels for which the report can be run (i.e., Level 1-Group, Level 2-Subordinate, etc.). There is also a "View Groups" link next to the Worksheet Type drop down to display the groups included in the group level selection. This option is available to managers only.
5. Add Displayed Columns from the Available Columns by using the > button. To remove Displayed Columns use the < button. If you want to add all the Available Columns to the Displayed Columns area use >> button.
6. Select your preference from the "Columns will be scaled as" drop down list.
7. Choose the Sort Rows by, Then by, Finally by options from each drop down list.
8. In the Save Report section, click:
    1. **Save**: to save the report.
    2. **Save and Run Report**: to run the report and save it.
    3. **Run Report**: to run the report without saving the report.

4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

9.15.4 Viewing Forecast Accuracy Report

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

Navigation

Forecast > Reports > Forecast Accuracy Report

Prerequisites

None

Steps

Follow these steps to view the Forecast Accuracy report:

Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select the Sales Group from the drop down list.
4. Search for a Salesperson by typing in a name, or partial name, and clicking **Go**.

Display Options

5. Select Reporting Currency.
6. Select Scaling.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

7. If you want to display the report on your home page, select the check box.

If you select the Display on Homepage check box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

Please note, if the Actuals section of the report does not display an amount, you must enter Actuals from the **Administration** > **Sales > Budget/Revenue Entry** link.

8. To download the report, click the **Download Report** icon.

9.15.5 Viewing Forecast to Pipeline Summary Report

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

Navigation

Forecast > Reports > Forecast to Pipeline Summary Report

Prerequisites

None

Steps

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

Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select Comparison Period.
4. Select Forecast Category.
5. Select the Sales Group from the drop down list.
6. Search for a Salesperson by typing in a name, or partial name, and clicking **Go**.
7. Select Credit Type from the drop down list.

Display Options

8. Select Reporting Currency.

9. Select Scaling.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

10. Select the "Display on Homepage" check box to display the report on your home page.

    If you select the Display on Homepage check box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

11. To download the report, click the **Download Report** icon.

9.15.6 Viewing Forecast Summary Report

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

It is important to know that if a change is made in the Win Loss Indicator, the concurrent request, as_sales_credit_denorm must be run in "Complete" mode in order for these changes to appear for the accuracy of this report.

Overview

The following criteria provides the basis for this report:

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

Navigation

Forecast > Reports > Forecast Summary Report

Prerequisites

None

Steps

Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select Comparison Period.
4. Select Forecast Category.
5. Select the Sales Group from the drop down list.
6. Search for a Salesperson by typing in a name, or partial name.
7. Click **Go**.
8. Select Credit Type from the drop down list.

Display Options

9. Select Reporting Currency.
10. Select Scaling.

In the Save Report section, click:

   1. **Save**: to save the report.
   2. **Save and Run Report**: to run the report and save it.
   3. **Run Report**: to run the report without saving the report.
   4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

11. Select the "Display on Homepage" check box to display the report on your home page.

    If you select the Display on Homepage check box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

12. To download the report, click the **Download Report** icon.

9.15.7 Viewing Forecast Progression Report

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

Navigation

Forecast > Reports > Forecast Progression Report

Prerequisites

None

Steps

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select the Date Range.
4. Select the "To" Date Range.
5. Enter the number of day you want to show progress in.
6. Select Forecast Category.
7. Select the Sales Group from the drop down list.
8. Search for a Salesperson by typing in a name, or partial name.
9. Select Credit Type from the drop down list.

Display Options

10. Select Reporting Currency.
11. Select Scaling.

In the Save Report section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

12. Select the "Display on Homepage" check box to display the report on your home page.

    If you select the Display on Homepage check box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

13. Click the **Download Report** icon to download the report.

    Please note, if you have selected a forecast period in the future, the Forecast Progression Report will use the last submitted values. For example, if today is January 1, 2003 and you want a Forecast Progression Report for January 1, 2003 to January 31, 2003, your last submitted forecast values will be used to generate the report.

9.15.8 Creating a Report

Navigation

Forecast > Reports

Prerequisites

None

Steps

Follow these steps to create a forecast report:

1. Select a forecast report.
2. Select new search filters.
3. Select new display options.
4. Select new sort options.
5. Enter a new report name.
6. Save and run the report.

9.15.9 Viewing Forecast History (Self) Chart

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

Navigation

Forecast > Reports

Prerequisites

A forecast history must exist.

Steps

1. Set up the parameters by selecting the Forecast History (self) link.
2. Select the period type from the drop down list.
3. Select the start period from the drop down lists.
4. Click **Save**.
5. To run the chart, click **Run Chart**.

9.15.10 Viewing Forecast History (Subordinates) Chart

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

Navigation

Forecast > Reports

Prerequisites

A subordinates forecast history must exist.

Steps

1. Set up the parameters by selecting the Forecast History (subordinates) link.
2. Select the period type from the drop down list.
3. Select the start period from the drop down lists.
4. Click **Save**.
5. To run the chart, click **Run Chart**.

10

Customer Tab

Sections in this chapter include:

- Section 10.1, "Overview of the Customer Tab"
- Section 10.2, "Organization Subtab"
- Section 10.3, "Person Subtab"
- Section 10.4, "Contacts Subtab"
- Section 10.5, "Contact List Subtab"
- Section 10.6, "Customer Reports"

10.1 Overview of the Customer Tab

Use the Customer tab to create and maintain Organizations, People, Contacts, and Lists by clicking the related subtab. Quick links at the top of the page and the "Return to Top" links in each section allow for easy navigation between sections.

Access to view, create, or update customer information is governed by the implementation of security settings for the application. Please refer to the *Oracle Sales Online Implementation Guide*, section *"Setting Up Users, Security, and Reporting Hierarchy"* or *"Setting Up Flexible Data Security"* for information about these topics.

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

- Section 10.2, "Organization Subtab"
  - Section 10.2.1, "Personalizing Organization Summary"
  - Section 10.2.2, "Creating a New Organization"
  - Section 10.2.3, "Maintaining Organization Details"

- Section 10.2.5, "Searching for an Organization"
- Section 10.2.6, "Adding Classifications"
- Section 10.2.7, "Creating and Maintaining Relationships"
- Section 10.2.8, "Maintaining Lead Details"
- Section 10.2.9, "Creating Opportunities"
- Section 10.2.10, "Maintaining Opportunity Details"
- Section 10.2.11, "Maintaining Quote Details"
- Section 10.2.12, "Notes"
- Section 10.2.13, "Sales Teams"
- Section 10.2.14, "Tasks"
- Section 10.2.15, "Interactions"
- Section 10.2.16, "Attachments"
- Section 10.2.17, "Accounts"
- Section 10.2.18, "360 Degree View"

- Section 10.3, "Person Subtab"
  - Section 10.3.2, "Personalizing Person Summary"
  - Section 10.3.3, "Creating a Person"
  - Section 10.3.4, "Maintaining Person Details"
  - Section 10.3.5, "Adding Classifications"
  - Section 10.3.6, "Searching for a Person"
  - Section 10.3.7, "Sending Collateral"
  - Section 10.3.8, "Creating and Maintaining Relationships"
  - Section 10.3.9, "Leads"
  - Section 10.3.10, "Creating Opportunities"
  - Section 10.3.11, "Maintaining Quote Details"
  - Section 10.3.12, "Notes"
  - Section 10.3.13, "Sales Teams"
  - Section 10.3.14, "Tasks"

  - Section 10.5.14, "Viewing Call Sheet Details"
  - Section 10.5.15, "Sorting a Call Sheet"
  - Section 10.5.16, "Selecting Multiple Contacts"
  - Section 10.5.17, "Adding a Task"
  - Section 10.5.19, "Viewing Calendar Tasks"
- Section 10.6, "Customer Reports"
  - Section 10.6.2, "Viewing the Task Classification Report"

10.2 Organization Subtab

The Organization main page, "My Organizations (Sales Team)", displays all organizations for which you are on the sales team. See the following topics covered in this section.

- Section 10.2.1, "Personalizing Organization Summary"
- Section 10.2.2, "Creating a New Organization"
- Section 10.2.3, "Maintaining Organization Details"
- Section 10.2.4, "Creating a New Address for the Organization"
- Section 10.2.5, "Searching for an Organization"
- Section 10.2.6, "Adding Classifications"
- Section 10.2.7, "Creating and Maintaining Relationships"
- Section 10.2.8, "Maintaining Lead Details"
- Section 10.2.9, "Creating Opportunities"
- Section 10.2.10, "Maintaining Opportunity Details"
- Section 10.2.11, "Maintaining Quote Details"
- Section 10.2.12, "Notes"
- Section 10.2.13, "Sales Teams"
- Section 10.2.14, "Tasks"
- Section 10.2.15, "Interactions"
- Section 10.2.16, "Attachments"

- Section 10.2.17, "Accounts"
- Section 10.2.18, "360 Degree View"

10.2.1 Personalizing Organization Summary

Please refer to the *Oracle Sales Online Implementation Guide* section "Factors That Affect Security", in the "Creating Organizations and Locations" section to understand how profile options affect the personalization if set at various levels. For example, setting the profile **OS: Customer Access Privilege** will affect personalizing the organization summary.

Navigation

Customer > Organization

Prerequisites

None

Steps

Follow these steps to personalize the organization summary page:

1. Click **Personalize**.
2. Change, add, or remove parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Select the Use as Summary Page Default check box.
7. Click **Save**, or **Save and Apply Search.**

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

10.2.2 Creating a New Organization

Organizations are companies and other entities with which you do business.

When creating an organization it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

Navigation

Customer > Organization

Prerequisites

None

Related Profiles

OS: Address Required for Organization affects the application in the following ways:

- If set to "Yes" then the address is mandatory for creating an organization.
- If set to "No" then you can create without the address.

OS: Create Organization Privilege: If set to "Yes", user can create organizations.

See Also Appendix A, "System Profile Options"

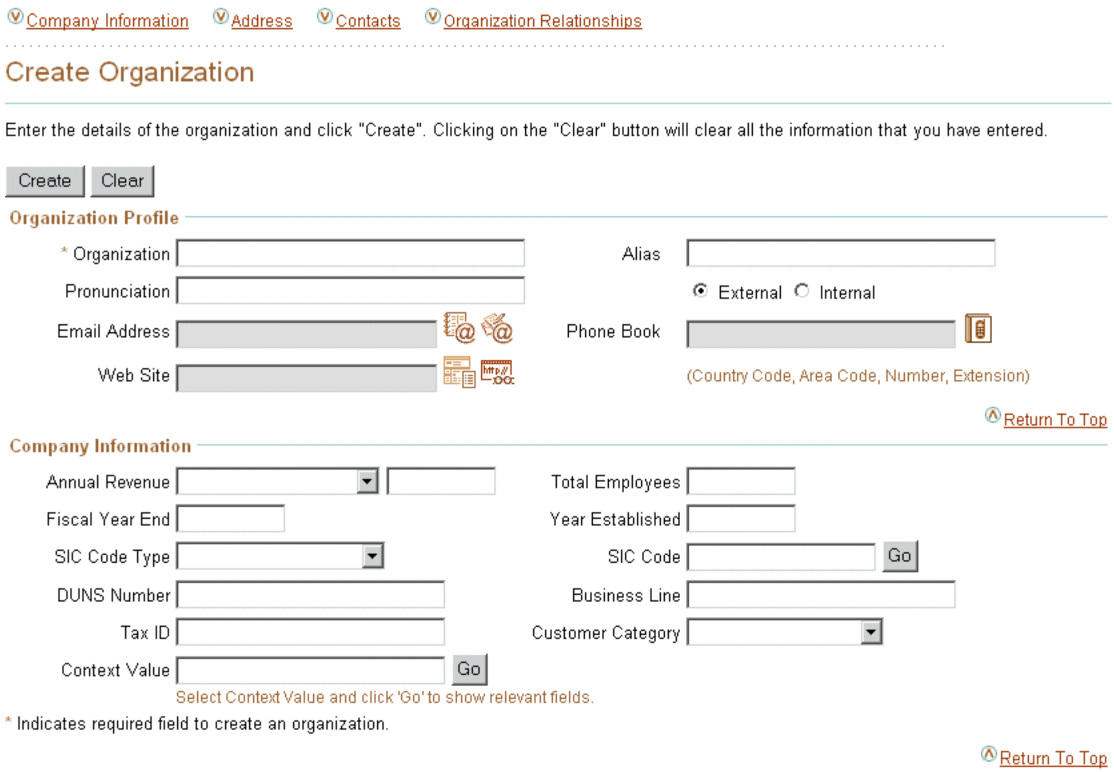
Steps

Follow these steps to create a new organization:

1. Click **Create** or go to Steps for Quick Create.

   The Create Organization page opens.

   The following table describes the fields that are available on the Create Organization page. Fields which are required are indicated in the "Required Field" column of the table. Use the links at the top of the page to navigate directly to a specific section, such as, Address or Contacts.



The following table describes the available Create Organization fields.

Field	Required Field	Description
Organization	Yes	Enter the organization name that will be used to identify the organization within the application.
Pronunciation	No	You can enter the organization name’s pronunciation.
Email Address	No	Enter the organization’s email address.
Web Site	No	Enter the organization’s web site.
Alias	No	Enter an alias, if applicable.
External/Internal	No	The default is External. Use Internal only if you are creating your organization.

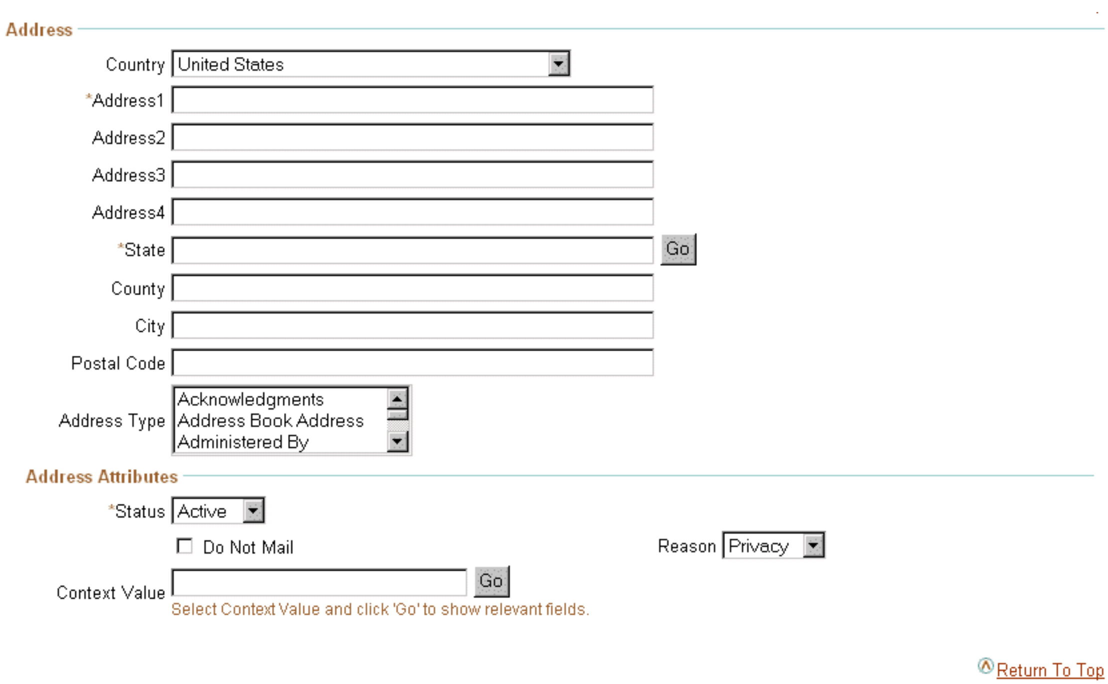
Field	Required Field	Description
Phonebook	No	Click the phonebook link to select another party phone number to display.

Company Information

The following table describes the fields in the Company Information section.

Field	Required Field	Description
Annual Revenue	No	Select from the drop down list.
Fiscal Year End	No	Enter the fiscal year end.
SIC Code Type	No	Select from the drop down list.
Duns Number	No	Enter the Dunn and Bradstreet number in this field.
Tax ID	No	Enter the tax identification number.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.
SIC Code	No	Select the SIC code.
Business Line	No	Enter the business line.
Customer Category	No	Select the customer category.

Address Information



The following table describes fields in the Address section.

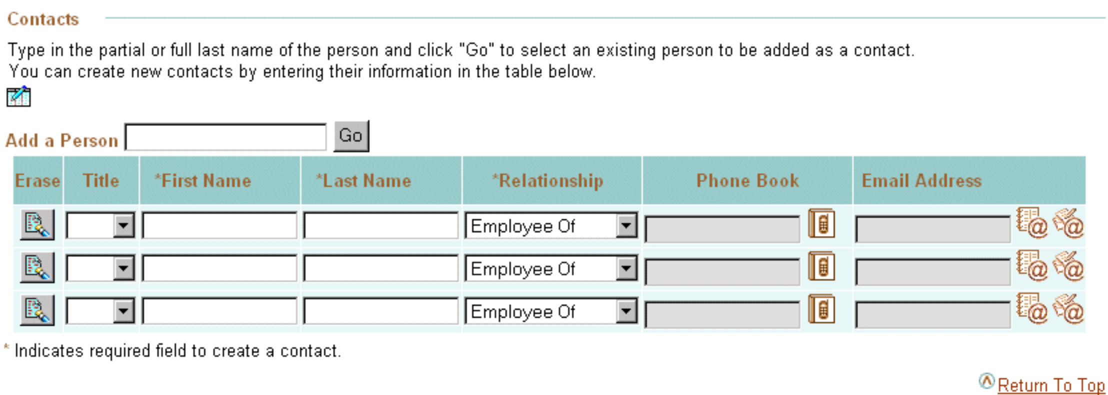
Field	Required Field	Description
Country	No	Select country from the drop down list.
Address Line 1	Yes	Enter the organization address.
Address Line 2	No	Enter additional organization address information.
Address Line 3	No	Enter additional organization address information.
Address Line 4	No	Enter additional organization address information.
State	No	Select from the drop down list.
County	No	Enter in the county field.
City	No	Enter in the city field.
Postal Code	No	Enter in the postal code field.

Field	Required Field	Description
Address Type	No	Select an address type from the list of values.
Status	Yes	Select Active or Inactive from the drop down list.
Do Not Mail	No	Select the check box if mail should not be sent.
Reason	No	Select a reason for not sending mail.

Contact Information

Type in the partial or full last name of the person and click "Go" to select an existing person to be added as a contact.

You can create new contacts or organization relationships by entering their information in the table shown below.



The following table describes fields in the Contact section.

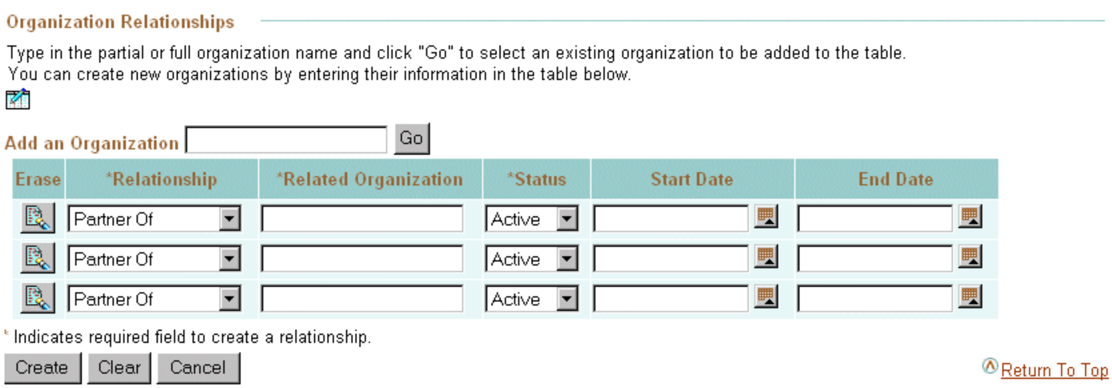
Field	Required Field	Description
Add a Person	Yes	If you are going to add a contact, enter the full or partial name and click the **Go** button.
Erase	No	To erase a contact from the table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.
Last Name	Yes	Enter the last name.

Field	Required Field	Description
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Address	No	Select an email address by clicking the email address book icon.

Organization Relationships

Type in the partial or full organization name and click "Go" to select an existing organization to be added to the table.

You can create new organizations by entering their information in the table shown below.



The following table describes Organization Relationship fields.

Field	Required Field	Description
Add an Organization	Yes	If you are going to add an organization relationship, enter the full or partial name and click **Go**.
Erase	No	To erase a relationship from the summary table, click the Erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Related Organization	Yes	This field holds the name of the related organization.
Status	Yes	Indicate the status of the relationship.

Field	Required Field	Description
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

2. Click **Create**.

Steps for Quick Create

When creating an organization it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

1. Click **Quick Create**.
2. The Quick Create Organization page opens.
3. Enter the name by which the organization will be identified.
4. Optionally, enter the DUNS number. The number associated with Dunn and Bradstreet information.
5. Optionally, enter the organization phone number.
6. Optionally, select the phone type, i.e., mobile, fax, pager.
7. Optionally, select the country that is associated with the address of the organization you are creating.
8. Enter the address in Address 1.
9. Select the state that the organization address is associated with. All other address fields are optional.
10. Click **Create**.

Keeping opportunity details current is an important part of Oracle Sales Online's functionality. By remaining current, these details are available to other sales team members who may view the opportunity at any given time. Follow these steps to maintain updated opportunity details.

10.2.3 Maintaining Organization Details

Keeping organization details current is an important part of Oracle Sales Online's functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

Navigation

Customer > Organization

Prerequisites

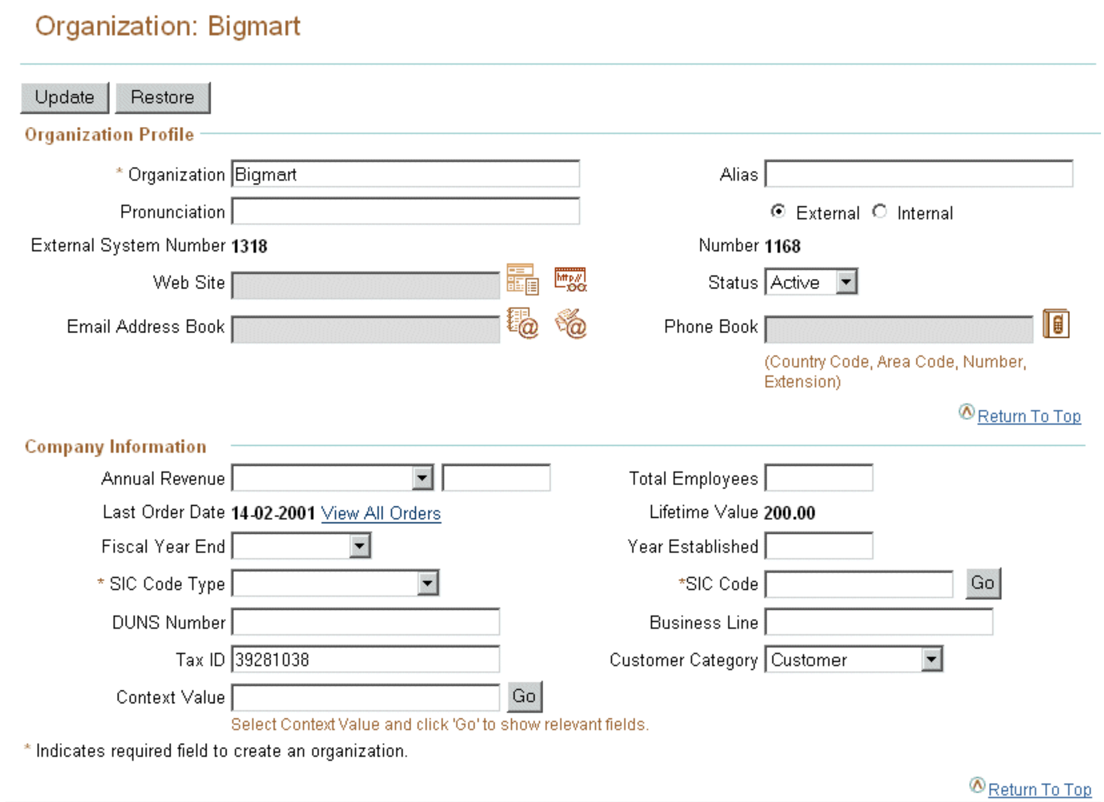
An organization must exist and you must have access to the organization.

Steps

Follow these steps to update details about an existing organization:

1. Search for the organization using Using Quick Find or Advanced Search.
2. To select an organization, click the organization's link.

   The **Organization Detail** Main page opens.
3. Add or update information on the page as seen below.

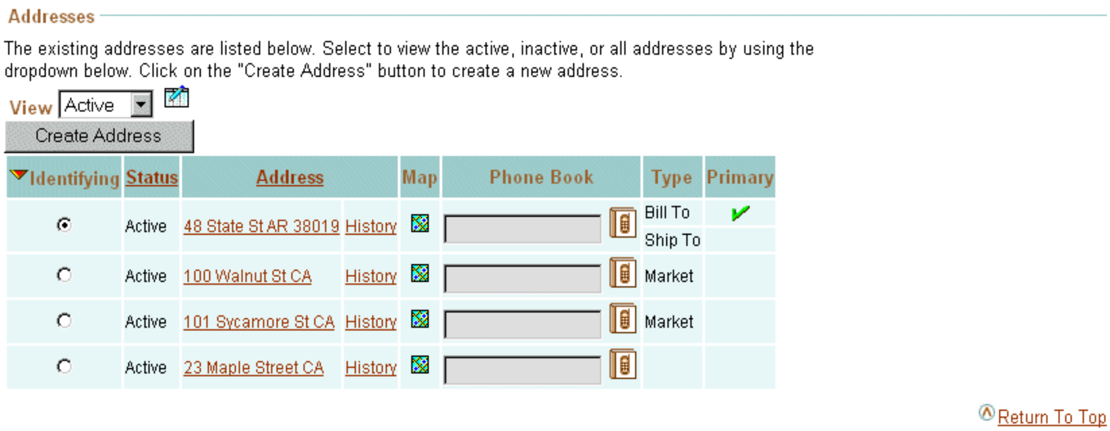


The following table describes the Organization Detail fields.

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Pronunciation	No	Enter the pronunciation of the organization’s name.
External System Number	No	View the external system number here.
Web Site	No	Click the link to view the organization’s web site. Click the icon to add or edit web site addresses.
Email Address Book	No	Enter the email address here or click the email address book to select another address.
Alias	No	Enter an organization alias.

Field	Required Field	Description
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization.
Number	No	View the number assigned to the organization.
Status	No	Select a status from the drop down list.
Phonebook	No	Click the phonebook icon to select another phone number.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Last Order Date	No	View the last order date.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
SIC Code Type	No	Select the Standard Industry Code type from the drop down list. SIC Code Version and SIC Code cannot be modified unless a valid selection is made using the SIC Code List of Values.
DUNS Number	No	Dunn and Bradstreet Number is pre-populated.
Tax Code/ID	No	Enter the tax code.
Total Employees	No	Enter the total number of employees.
Lifetime Value	No	View the sum of all the orders placed by the customer.
Year Established	No	Enter the year the organization was established.
SIC Code	No	Select the Standard Industry Code from the drop down list.
Business Line	No	Enter a business line, if applicable.
Customer Category	No	Select customer category from the drop down list.

4. The Address section allows you to edit information about the organization's address.



The following list helps to identify the fields in this section:

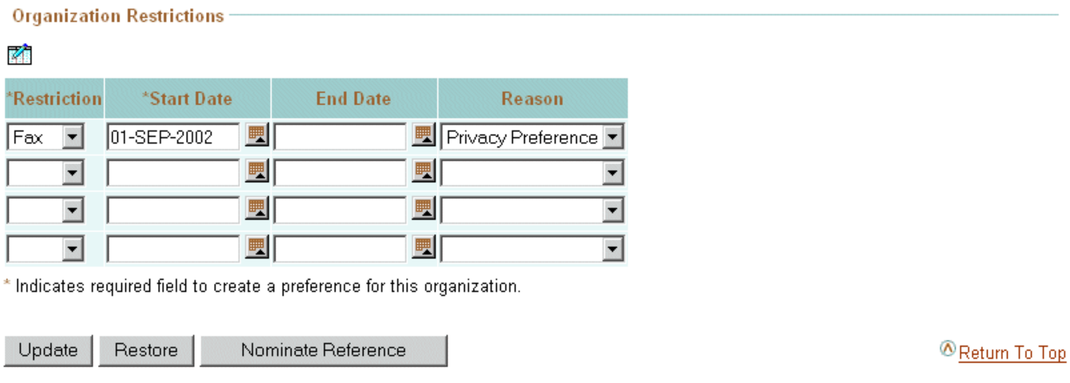
- Identifying: Main address used to identify the organization
- Status: Displays the status indicated in the details
- History: Address history of the organization
- Map It: Map the address by clicking the icon
- Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
- Type: Displays the address type indicated in the details
- Primary: Used to indicate primary address type across physical addresses

To create a new address, click the **Create Address** button. See Section 10.2.4, "Creating a New Address for the Organization".

5. In the Organization Restrictions section you can update specific preferences for this organization.

   The following list helps to identify the fields in this section:

   - Restriction: Select the restriction topic
   - Start Date: Choose a start date for this preference
   - End Date: Choose an end date for this preference
   - Reason: Select a reason



6. Click **Update** to add the information that you have entered.

10.2.4 Creating a New Address for the Organization

Navigation

Customer > Organization

Prerequisites

None

Steps

To create a new address for this organization, follow these steps:

1. Click **Create Address**.
2. Select the country from the drop down list. This is a required field.

   The page will display fields according to the country that you have chosen. Since each country's address fields may be different, your page may display other fields than those that are listed in the following steps.
3. Enter the address. The only required field is Address 1.
4. Enter the state. This is a required field.
5. Select a status from the drop down list. This is a required field.
6. All other fields are optional.
7. Click **OK**.

The Organization Detail page opens.

8. Click **Update**.

10.2.5 Searching for an Organization

Navigation

Customer > Organization

Prerequisites

None

Oracle Sales Online provides two ways to search for information:

Quick Find and Advanced Search

Quick Find

Quick Find is a single field search.

Steps

To search using **Quick Find**:

1. Choose the item for which you are searching from the drop down list.

   This function provides a simple lookup using the name of the following types of data:

   - Email: matches the email address for organizations, people and contacts
   - Opportunity: matches on the opportunity name
   - Opportunity Owner: matches on the opportunity owner
   - Organization: matches on the organization name
   - Person: matches on the person’s last name
   - Contact: matches on the person’s last name and they are defined as a contact
   - Lead: matches on the lead name
   - Company Research: links to the Hoover’s Inc. company research database
   - Appointment: matches on the appointment name

- Task: matches on the task name
- Notes: matches on the note name

The wildcard character ‘%’ (percent sign) can be used to replace one or more characters in the search string. The ‘%’ cannot be the first character in the search string.

2. Click **Go**.

The quick find displays only the basic information about the object.

There are profile options to control the level of access to customer, leads and opportunities. When the profile for customers is limited to Sales Team access, you will be able to find the organization, person or contact, but not view the detail screen.

When the profile for leads and opportunity is limited to Sales Team access, you will not be able to find any lead or opportunity unless you are on the sales team.

When the profiles are set to Full access, you will be able to find, view the details, and update the objects.

Advanced Search

The Advanced Search is a parameter driven detailed search related to the tab that is active. In this search, you have the option of saving the search criteria and using it as the default summary screen for the selected tab. In addition to a wide variety of parameters, you can select the columns that you want to display in the search results and select from three levels of sort criteria.

Example

You are trying to locate a person or contact in Oracle Sales Online and only have the person's telephone number with no additional information. Whereas Quick Find is limited to person, organization, email, etc., Advanced Search allows you to customize your search.

You can search by phone number for person using the following navigation:

1. Customer Tab > Person > Advanced Search
2. Enter the person’s phone number.
3. Click **Search**.

Steps

To search using **Advanced Search**:

1. Click the **Advanced Search** link or the Personalize button.

   Advanced Searches are available with the following tabs:

   - Customer
   - Partner
   - Lead
   - Opportunity

2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

Once a search is saved, the name will become an option for the object's summary screen.

10.2.6 Adding Classifications

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

Navigation

Customer > Organization, Person, or Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

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

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

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

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

You can modify and add data, such as Primary, Start Date, and End Date from this page.

10.2.7 Creating and Maintaining Relationships

Organizations can have two types of relationships: Organization to Organization and Organization to Person. Use Organization to Organization relationships to create relationships between companies, such as, parent and subsidiary, headquarters and division, partner and competitor. Use Organization to Person relationships to create business contact relationships.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of customers and related customer existing addresses. If you change one of these addresses, you must complete this action by going to the customer or related customers record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

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

10.2.7.1 Creating an Organization to Organization Relationship

Navigation

Customer > Organization > Relationships

Prerequisites

The Organization should exist.

Related Implementation Information

Refer to the "Setting up Relationships" section, "Setting Up Relationships for Customers Upgrading from Previous Releases" of the *Oracle Sales Online Implementation Guide*. Information about setting the "Create Party" flag to "Yes" is related to this functionality. This setup can be performed by a System Administrator.

Following profile options must be set at the site level:

- OSO: Disable Page Level Security set to Yes
- OSO: Person Detail Security Check set to No

Steps

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

1. Select an existing organization. Or click the "Create New Organization" link if you want to create a new organization.
2. Select the relationship type between the two organizations.
3. Select a start and end date for this relationship, if applicable.
4. Optionally, enter email address and phone number in the fields provided.
5. Select the relationship status from the drop down list.
6. Enter notes by selecting the note type and status from the drop down list.
7. Enter the note text in the text box.
8. To relate this note, select the related item type from the drop down. Enter the name, click **Go**.
9. Click **Create**.

10.2.7.2 Creating an Organization to Person Relationship

Navigation

Customer > Organization > Relationships

Prerequisites

The Organization should exist.

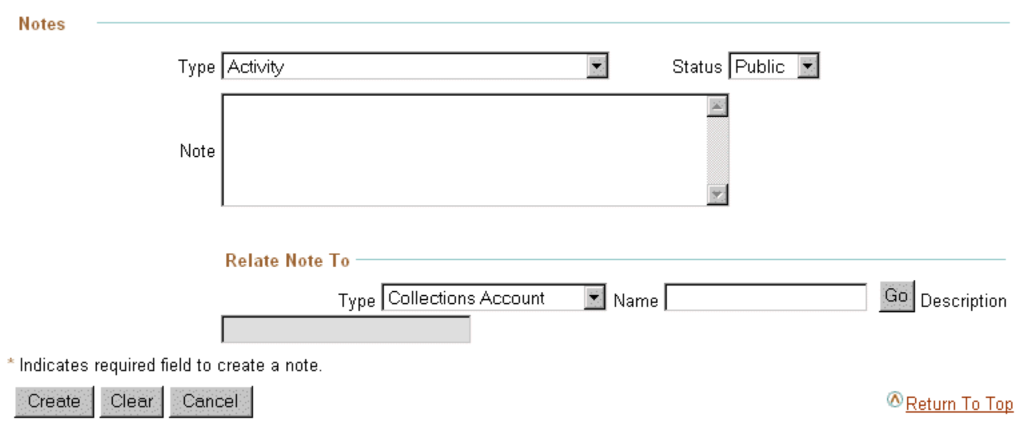
Steps

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

1. Select an existing person. Or click the "Create New Person" link if you want to create a new person.
2. Select the relationship type between the organization and the person.

Type in the partial or full last name of the person and click "Go" to select a person.

3. Select a start and end date for this relationship, if applicable.
4. Optionally, enter email address and phone number in the fields provided.
5. Select the relationship status from the drop down list.
6. Optionally, enter mailstop, department, job title, preferred language, manager, department type, and job title type.
7. Indicate whether this person is a decision maker or reference by selecting the check box.
8. Enter notes by selecting the note type and status from the drop down list.
9. Enter the note text in the text box.



10. To relate this note, select the related item type from the drop down. Enter the name, click **Go**.
11. Click **Create**.

10.2.8 Maintaining Lead Details

Navigation

Customer > Organization > Leads

Steps

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

1. Search for the organization from which you want to edit lead details using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Leads**.

   You can update the following fields on the Organization Detail page for leads.
   - Lead Name
   - Customer
   - Status
   - Lead Rank
   - Channel
   - Timeframe
   - Budget Status
   - Budget Amount
   - Assigned Date
4. Click **Update**.

10.2.9 Creating Opportunities

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

Navigation

Customer > Organization > Opportunities

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table or, using Using Quick Find or Advanced Search.
2. Click the organization link to select it.
3. Click **Opportunities**.

   You will see a summary of all opportunities for the specific organization.
4. Click **Create**.

10.2.10 Maintaining Opportunity Details

You can update opportunity details directly from the summary table.

Navigation

Customer > Organization > Opportunities

Prerequisites

An opportunity must exist.

Steps

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table or, using Using Quick Find or Advanced Search.
2. Click the organization link to select it.
3. Click **Opportunities**.

   You will see a summary of all opportunities for the specific organization.
4. The following fields can be updated:
   - Sales Stage
   - Win Probability
   - Status
   - Close Date
   - Amount
5. Update information.

6. Click **Update**.

10.2.11 Maintaining Quote Details

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

Navigation

Customer > Organization > Quotes

Prerequisites

A quote must exist.

Steps

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization or person link to select it.

   The Organization Detail page opens.
3. Click **Quotes**.

   The Quote Detail page opens.
4. Update quote information.
5. Click **Update**.

For information about using quotes, please refer to the *Oracle HTML Quoting User Guide*.

10.2.12 Notes

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

- Section 10.2.12.1, "Creating a Note"
- Section 10.2.12.2, "Viewing a Note"

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

10.2.12.1 Creating a Note

Navigation

Customer > Organization > Notes

Prerequisites

None

Steps

Follow these steps to create a note:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The **Organization Detail** Main page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.

   You can change the default type using Profiles.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.

> **Note:** Once a note is created, it cannot be updated.

10.2.12.2 Viewing a Note

Navigation

Customer > Organization > Notes

Prerequisites

The note must exist.

Steps

Follow these steps to view a note:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The **Organization Detail** Main page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.

   The default type can be changed using Profiles.
5. Choose the number of days for which you want the notes history.
6. Click **Apply**.
7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
8. To view "All Notes" in a printable version, click **All Notes**.

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

10.2.13 Sales Teams

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

The sales team is divided into two sections:

- Internal: salespeople or internal users
- External: partners and partner users

  Partner and partner contacts can be added to the external sales team of an organization, lead, or opportunity if:

  – Partner has partner profile created
  – Partner should be a sales partner in order to see partner contacts
  – Partner contact should be a valid user and resource
  – Partner needs to be added to the sales team before the contact can be added

    For information about partners, please refer to the *Oracle Partners Online User Guide*.

You can filter sales teams by the following criteria:

- Sales Group list of values
- Salesperson list of values
- Territory Location list of values
- Roles dropdown

See Also

- Section 10.2.13.1, "Adding a Sales Team Member"
- Section 10.2.13.2, "Adding a Partner to a Sales Team"
- Section 10.2.13.3, "Adding a Resource Team to a Sales Team"
- Section 10.2.13.4, "Removing a Sales Team Member"

Related Profiles

OS: Always Put Creator on Sales Team

When a salesperson has sales team access to customer records, the creator of the record is always added to the sales team. If a salesperson has full/prospecting access, then the profile "OS: Always Put Creator on Sales Team", is used to decide whether the salesperson is added to the customer sales team. If the profile is set to "Yes", then the salesperson is added to the sales team. If set to "No", the user is not added to the sales team.

10.2.13.1 Adding a Sales Team Member

Navigation

Customer > Organization > Sales Team > Internal

Prerequisites

None

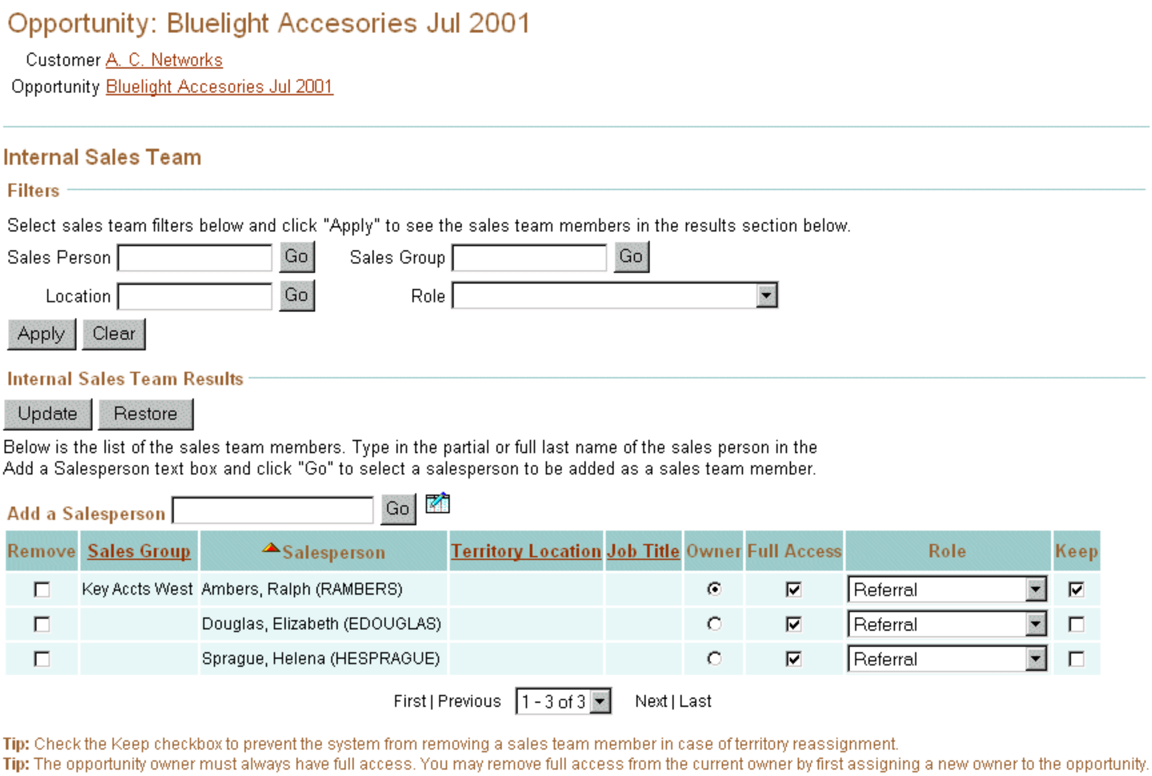
Steps

Follow these steps to add a sales team member:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

The Organization Detail Main page opens.

3. Click **Sales Team**.



4. Select sales team filters and click **Apply** to see the sales team members in the results section.

5. Enter the last name or partial name of the sales representative in the "Add a Salesperson" field, and click **Go**.

6. Click the salesperson link. The salesperson will be added to the summary table.

7. Click **Update**.

   Tip: Select the Keep checkbox to prevent the system from removing a sales team member in case of territory reassignment.

Tip: The opportunity owner must always have full access. You may remove full access from the current owner by first assigning a new owner to the opportunity.

10.2.13.2 Adding a Partner to a Sales Team

Navigation

Customer > Organization > Sales Team > External

Prerequisites

None

Steps

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

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

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

Reference

Refer to the *Oracle Partners Online User Guide* for more detailed information.

10.2.13.3 Adding a Resource Team to a Sales Team

The resource team is an independent list of sales representatives identified by a team name. When you want to add the same set of users to several opportunities, using a resource team makes the process much faster. Resource teams are created and maintained in the CRM Foundation Resource Manager.

Navigation

Customer > Organization > Sales Team > Internal

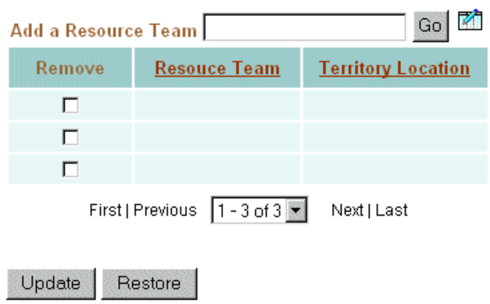
Prerequisites

None

Steps

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

1. Type in the full or partial resource team name in the Add a Resource Team text box.



2. Click **Go** to select a resource team to be added to the sales team.
3. The members of the resource team will appear in the Internal and External Sales Team lists after you click **Update** to save your changes.
4. Click **Update**.

10.2.13.4 Removing a Sales Team Member

Navigation

Customer > Organization > Sales Team Member > Internal

Prerequisites

A sales team member must exist on the sales team.

Steps

Follow these steps to remove a sales team member:

1. Select sales team filters and click **Apply** to see the sales team members in the results section.
2. Locate the salesperson that you want to remove on the summary table.

Note: You cannot remove the salesperson if they are the only sales team member assigned to the customer.

3. Select the Remove check box.
4. Click **Update**.

10.2.14 Tasks

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

- Section 10.2.14.1, "Creating a Task"
- Section 10.2.14.2, "Adding an Attachment to a Task"

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

10.2.14.1 Creating a Task

Navigation

Customer > Organization > Tasks

Prerequisites

None

Steps

Follow these steps to create a task:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.

3. Click **Sales Team**.
4. Click **Tasks**.
5. Click **Create**.

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

   If the task is a private task, select the Private box. This task can only be assigned to you.
7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the task owner, click **Go**.
14. Select a task owner by clicking the link from the list of search results.
15. Optionally, you can relate the task to an opportunity, organization, person or relationship, click **Go**.

    The default, since you are creating the task in the context of an organization, is related to that organization.
16. Click **Create**.

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

10.2.14.2 Adding an Attachment to a Task

Navigation

Customer > Organization > Attachments

Prerequisites

The task must exist.

Steps

Follow these steps to add an attachment:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Attachments**.
4. Click **Add**.

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

10.2.15 Interactions

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

- Section 10.2.15.1, "Viewing Interactions"

10.2.15.1 Viewing Interactions

Navigation

Customer > Organization > Interactions

Prerequisites

The interaction must exist.

Steps

Follow these steps to view interactions:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.

3. Click **Interactions**.
4. Select search filters.
5. Click **Apply**.

10.2.16 Attachments

Attachments are defined as documents, URLs, or text. The most common use of attachments is for sharing and storing information about a customer. For example, attach a press release about a customer for future reference.

- Section 10.2.16.1, "Adding an Attachment"
- Section 10.2.16.2, "Viewing an Existing Attachment"

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

10.2.16.1 Adding an Attachment

Navigation

Customer > Organization > Attachments

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Attachments**.
4. Click **Add**.

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

10.2.16.2 Viewing an Existing Attachment

Navigation

Customer > Organization > Attachments

Steps

To view an existing attachment, click the attachment link.

10.2.17 Accounts

Accounts are used to track and report financial transactions. Whenever a customer places an order, an invoice is created or payment made, the transactions are posted against the customer's account. In the Campaign to Cash business flow, an account must be created before an order can be entered for the customer.

Only valid addresses that satisfy the address validation rules that you have set up within Oracle Accounts Receivable can be used as account sites. Those that are not valid will display with a "lock" icon and cannot be used to create account sites.

- Section 10.2.17.1, "Creating Accounts"
- Section 10.2.17.2, "Maintaining Account Details"
- Section 10.2.17.3, "Viewing Account Sites"
- Section 10.2.17.4, "Viewing Account Roles"
- Section 10.2.17.5, "Viewing Account Relationships"

10.2.17.1 Creating Accounts

Navigation

Customer > Organization > Accounts

Prerequisites

None

Steps

Follow these steps to create an account:

1. Search for the organization using Using Quick Find or Advanced Search.

2. Click the organization link to select it.

   The Organization Detail Main page opens.

3. Click **Accounts**.

   The Account Summary page opens with all accounts that exist for the Organization or Person.

4. Click **Create**.

   The Create Account page opens.

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

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

5. Click **Create**.

10.2.17.2 Maintaining Account Details

Navigation

Customer > Organization > Accounts

Prerequisites

An account for an organization must exist.

Steps

Follow these steps to view an account:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

   The Account Detail page opens.

   The following table describes the Account Detail fields.

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

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

5. Edit information.
6. Click **Update**.

10.2.17.3 Viewing Account Sites

Navigation

Customer > Organization > Accounts

Prerequisites

An account site must exist.

Steps

Follow these steps to view an account site:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

   The Account Detail page opens.
5. Click **Sites**.
   1. To add a site, click **Add Site**.
   2. Select an address that already exists
   - Change the site use by selecting from the drop down list
   - Select the Primary check box, if applicable
   - Change the site Status by selecting from the drop down list
   3. To view site details, click the site **Address** link.

4. To view site history, click **History**.
5. To map the site address, click **Map It**.

10.2.17.4 Viewing Account Roles

Navigation

Customer > Organization > Accounts

Prerequisites

An account role must exist.

Steps

Follow these steps to view an account role:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

   The Account Detail page opens.
5. Click **Roles**.
   a. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using % as a wildcard. Click **Go**.
   b. To remove a role, locate the related account and click the Erase icon.
   c. To change the role type, select from the drop down list.
   d. To indicate a primary role, select the Primary Role radio button.
   e. To change the status, select from the drop down list.
   f. To find an address, enter the full or partial address using % as a wildcard. Click **Go**.
   g. Select an effective date by clicking the calendar icon and choosing a date.
   h. Select an end date by clicking the calendar icon and choosing a date.
6. Click **Update**.

10.2.17.5 Viewing Account Relationships

Navigation

Customer > Organization > Accounts

Prerequisites

An account relationship must exist.

Steps

Follow these steps to view an account relationship:

1. Search for the organization using Using Quick Find or Advanced Search.
2. Click the organization link to select it.

   The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

   The Account Detail page opens.
5. Click **Relationships**.
   a. To remove a relationship, locate the related account and click the Erase icon.
   b. To find a related account number, enter the account number and click **Go**.
   c. The related account name will populate the field.
   d. To change the relationship type, select from the drop down list.
   e. To change the status, select from the drop down list.
   f. To indicate a reciprocal relationship, select the Reciprocal check box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
6. Click **Update**.

10.2.18 360 Degree View

In order to use the 360 degree view, you must have *i*Store installed to view orders, Install Base to view products installed, and *i*Support to view the Invoices, Returns, and Service Requests.

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

10.2.18.1 Viewing 360 Degree View

In order to use the 360 degree view, you must have iStore installed to view orders, Install Base to view products installed, and *i*Support to view the Invoices, Returns, Service Requests, and Quotes. To view projects from the 360 degree view, Oracle Projects must be installed.

Navigation

Customer > Organization > 360 View

Prerequisites

In order to use the 360 degree view, you must have *i*Store installed to view orders, Install Base to view products installed, and *i*Support to view the Invoices, Returns, and Service Requests.

Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, select an organization or person. Search using Using Quick Find or Advanced Search.

   The Organization detail main page opens.

2. Click **360 View**.
3. You can view summary pages for each of the following by clicking each link:

- Orders: Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.
- Invoices: Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.
- Service Requests: A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.

- Products: This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.
- Returns: Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.
- Projects: You can view the projects for the associated customer organization or person. Drill down to view the project details.
- Campaigns: Provides a list of campaigns the customer has been a part of. This is populated from Oracle Marketing.
- Events: A list of events onto which the customer has enrolled. This is populated from Oracle Marketing.

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

10.3 Person Subtab

The following tasks can be performed from the Person subtab:

- Section 10.3.2, "Personalizing Person Summary"
- Section 10.3.3, "Creating a Person"
- Section 10.3.4, "Maintaining Person Details"
- Section 10.3.5, "Adding Classifications"
- Section 10.3.6, "Searching for a Person"
- Section 10.3.7, "Sending Collateral"
- Section 10.3.8, "Creating and Maintaining Relationships"
- Section 10.3.9, "Leads"
- Section 10.3.10, "Creating Opportunities"
- Section 10.3.11, "Maintaining Quote Details"
- Section 10.3.12, "Notes"
- Section 10.3.13, "Sales Teams"
- Section 10.3.14, "Tasks"
- Section 10.3.15, "Interactions"
- Section 10.3.16, "Attachments"

- Section 10.3.17, "Accounts"
- Section 10.3.18, "360 Degree View"

10.3.1 Person Summary

Within Oracle Sales Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a contact is a person who has a relationship (usually an employee/employer relationship) with the organization (or another person) with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, i.e., an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet number, or tax identification number.

An example:

Person A is a Business to Consumer customer and an employee of Company B. This relationship (employee of) makes Person A a contact of Company B.

10.3.2 Personalizing Person Summary

You can use the Personalize button to define your own personal list of People. The default view is "My People" where you will see details for those people who are also on your sales team.

Navigation

Customer > Person

Steps

Follow these steps to personalize the person summary:

1. Click **Personalize**.
2. Either choose an existing search by selecting it from the drop down list and click **Go** OR enter search criteria in Person, Address, Sales Team, Relationship sections, if desired to view consumers.
3. Choose display options.
4. Enter a Search Name.
5. Select the Use as Summary Page Default check box.

6. Click **Save**, or **Save and Apply Search**. If you want to search without saving the search, click **Search**.

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

10.3.3 Creating a Person

When creating a person it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

Navigation

Customer > Person

Prerequisites

None

Related Profiles

Profile options set during implementation govern the way a person is created. The profile option "**OS: Address Required for Person**" affects the application in the following ways:

- If set to "Yes" then the address is mandatory for creating a person. It is then required that you go to the "Create Person" page where you must enter the address while creating the person. In this case there are no empty rows in the contact table.
- If set to "No" then you can create without the address. You are not required to go to the "Create Person" page. Instead, you can create a new person and a contact by entering data in empty rows in the contact table. In this case the "Create Person" button is not displayed.

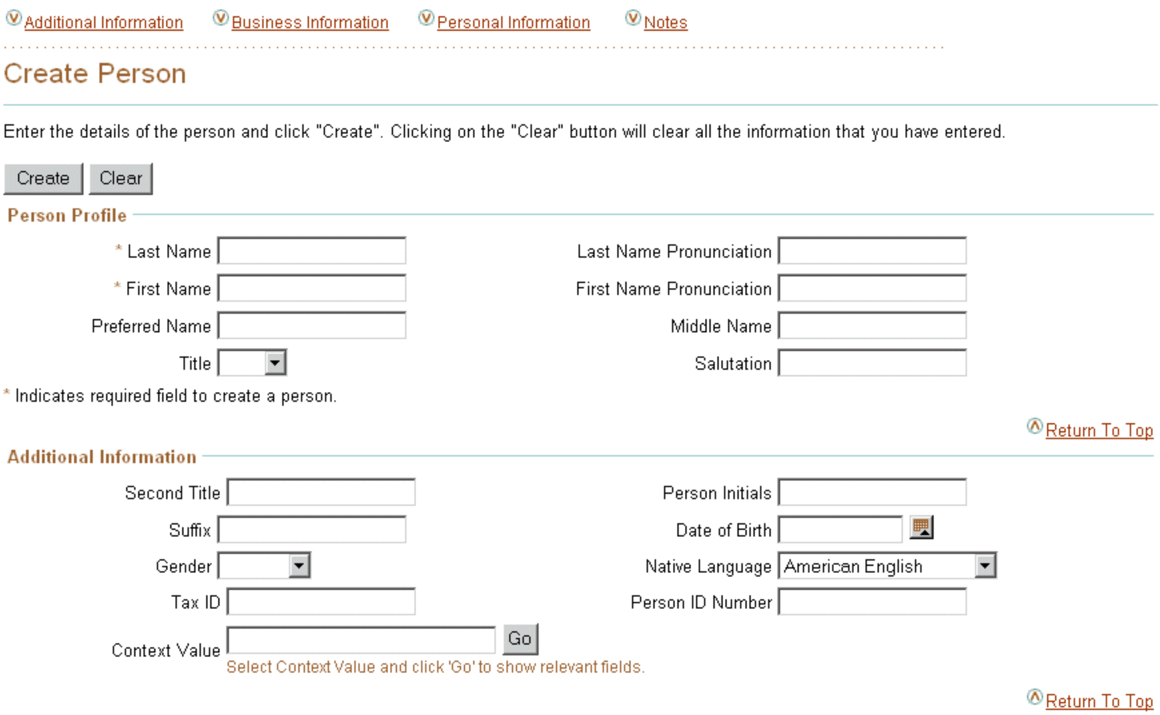
OS: Create Person Privilege: If set to "Yes", user can create people.

Steps

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

1. Click **Create** or go to Steps for Quick Create.

The Create Person page opens.



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

Field	Required Field	Description
Last Name	Yes	Enter the last name of the person you are creating.
First Name	Yes	Enter the first name of the person you are creating.
Preferred Name	No	Enter the name by which the person you are creating prefers to be addressed, if different from their actual name, if applicable.
Title	No	Select a title that is appropriate for the person you are creating.
Last Name Pronunciation	No	Enter the pronunciation of the last name of the person you are creating.
First Name Pronunciation	No	Enter the pronunciation of the first name of the person you are creating.

Field	Required Field	Description
Middle Name	No	Enter the middle name of the person you are creating.
Salutation	No	Enter a salutation, if applicable.

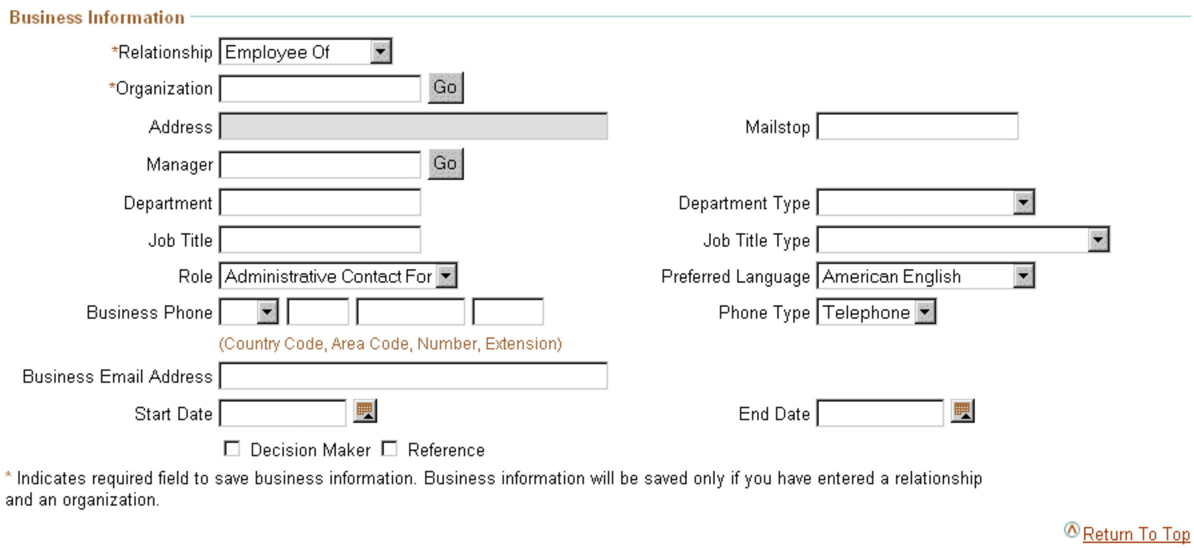
Additional Information

In this section you can keep track of information as outlined in the following table.

Field	Required Field	Description
Second Title	No	Enter a second title, if desired.
Suffix	No	Enter a suffix, if applicable.
Gender	No	Select a gender from the drop down list.
Tax ID	No	Enter the tax identification number.
Personal Initials	No	Enter personal initials in this field.
Date of Birth	No	Select date of birth.
Native Language	No	Select from the drop down list.
Person ID Number	No	Select a status from the drop down list.

Business Information

Business information will be saved only if you have entered a relationship and an organization.



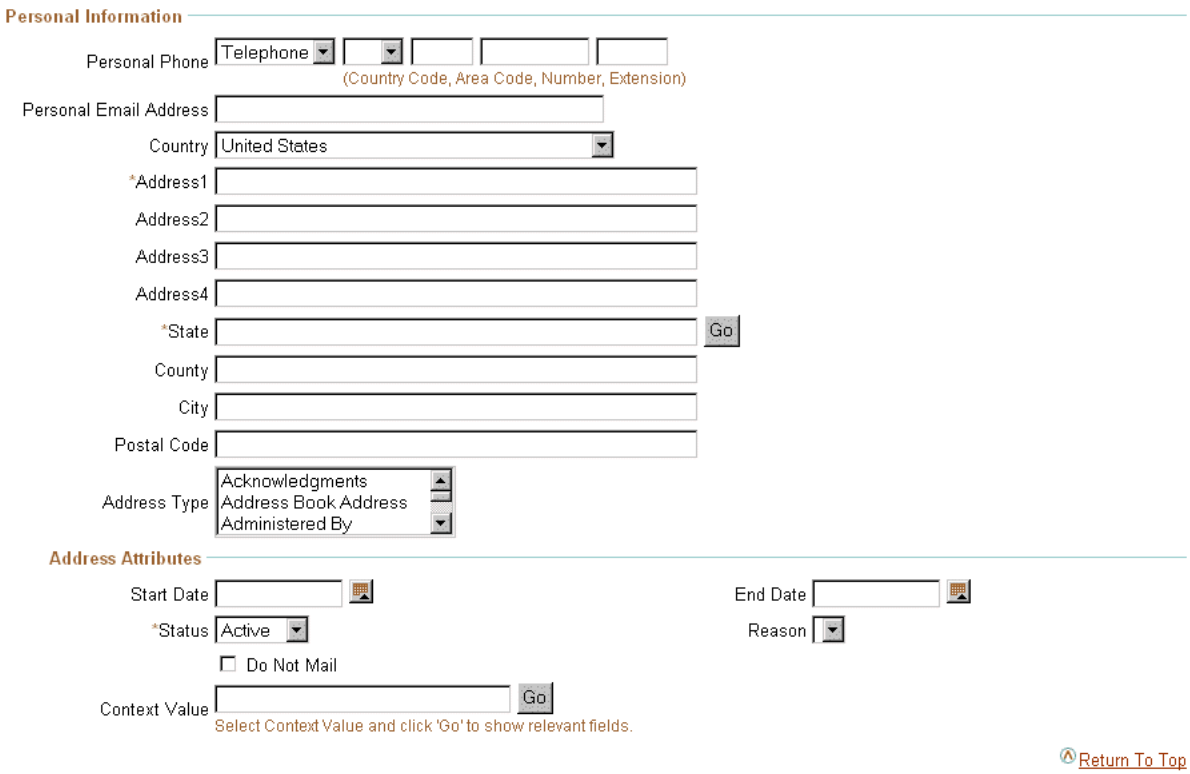
The following table describes the Business Information section.

Field	Required Field	Description
Relationship	Yes	Select a relationship from the drop down list.
Organization	Yes	Select an organization to form the business relationship with.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking **Go**.
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.
Role	No	Select a role from the drop down list.
Business Phone	No	Select a phone number from the party list by clicking the phonebook icon.
Business Email		Enter the business email address.
Start Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Select the check box to indicate that the person is a decision maker.

Field	Required Field	Description
Reference	No	Select the check box to indicate the person can be considered a reference.
Mail Stop	No	Enter the mail stop.
Department Type	No	Select the department type.
Job Title Type	No	Select the job title type from the drop down list.
Preferred Language	No	Select the preferred language from the drop down list.
Phone Type	No	Select the phone type from the drop down list.
End Date	No	Select a date by clicking the calendar icon.

Personal Information

Keep track of personal information about this person with the personal information section.



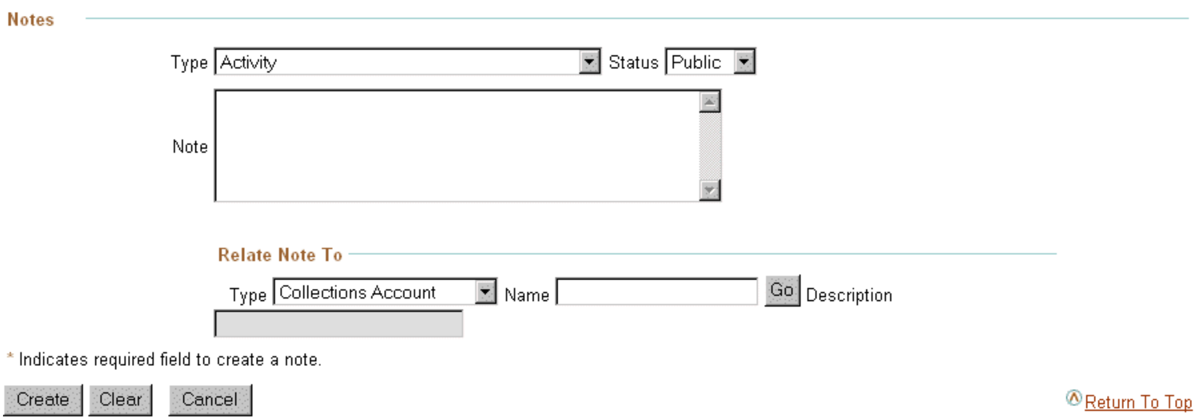
2. In the Personal Information section, you can enter information such as:

- Personal Phone
- Personal Email
- Country
- Address Lines 1-4
- State
- County
- City
- Postal Code
- Address Type
- Start Date

- End Date
- Status
- Reason

Notes

Keep track of notes about this person in this section.



3. In the Notes sections, you can enter notes associated with this person.
   1. Select the note type from the drop down list.
   2. Select the status of the note.
   3. Enter text in the Note box.
4. Click **Create**.

Steps for Quick Create

When creating a person it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

1. Click **Quick Create**.
2. The Quick Create Person page opens.

3. Enter the last name and first name of the person that you are creating.
4. Optionally, select the person's date of birth.
5. Optionally, enter the person's phone number.
6. Optionally, select the phone type of the phone number, i.e., fax, mobile, pager.
7. Optionally, select the country that is associated with the address of the person you are creating.
8. Enter the address in Address 1.
9. Select the state that the person address is associated with. All other address fields are optional.
10. Click **Create**.

10.3.4 Maintaining Person Details

Keeping person details current is an important part of Oracle Sales Online's functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

Navigation

Customer > Person

Prerequisites

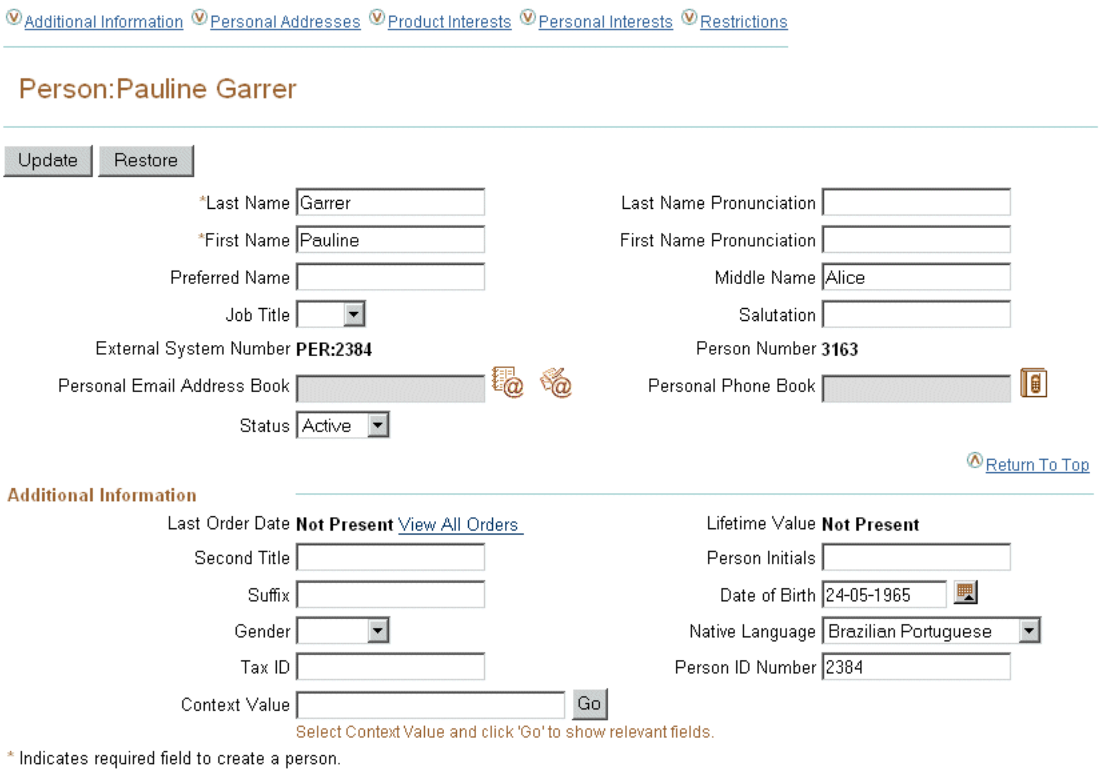
A person must exist.

Steps

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

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person from the Search Results page by clicking the person's link.

   The Person Detail page opens.



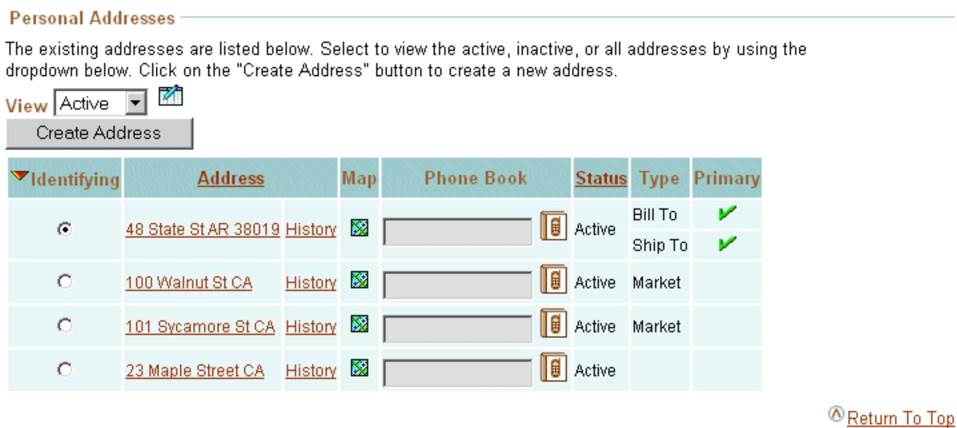
The following table describes the Person Details fields.

Field	Required Field	Description
Last Name	Yes	This is the last name of the person.
First Name	Yes	This is the person’s first name.
Preferred Name	No	If they have a preferred name, you can enter it here.
Title	No	This is the title by which the person prefers to be addressed.
External System Number	No	View the external system number.
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.
Status	No	Select from the drop down list.
Last Name Pronunciation	No	Enter the pronunciation of the last name.

Field	Required Field	Description
First Name Pronunciation	No	Enter the pronunciation of the first name.
Middle Name	No	Enter the middle name.
Salutation	No	Enter a salutation if desired.
Person Number		Read only field.
Personal Phone Book	No	This is the personal phone number for the person.
Last Order Date	No	View the last order date.
Second Title	No	Enter the second title, if desired.
Suffix	No	Enter a suffix, such as Mr., Mrs., Ms., Dr.
Gender	No	This is the gender of the person.
Tax ID	No	
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
Personal Initials	No	
Date of Birth	No	Enter the date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.
Person ID Number	No	

Personal Address

The existing addresses are listed. Select to view the active, inactive, or all addresses by using the drop down. Click the "Create Address" button to create a new address.

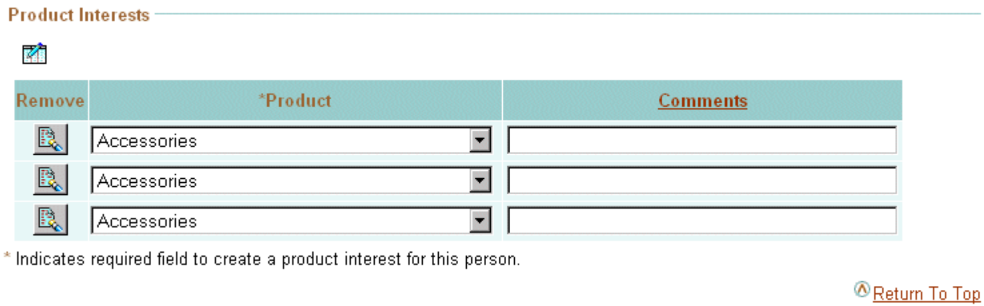


3. In the Personal Addresses section you can edit information such as:

- Identifying Address: Main address used to identify the person
- History: Address history of the person
- Map: Map the address by clicking the icon
- Phonebook: This is the phone number that is associated with a particular address. For example, if you are a sales person and have several field offices that you frequent, you can have a phone number for the Miami office, the Orlando office, and the Tampa office recorded in this area. Change the phone number by clicking the phone icon.
- Status: Displays the status indicated in the details
- Type: Displays the address type indicated in the details

Product Interests

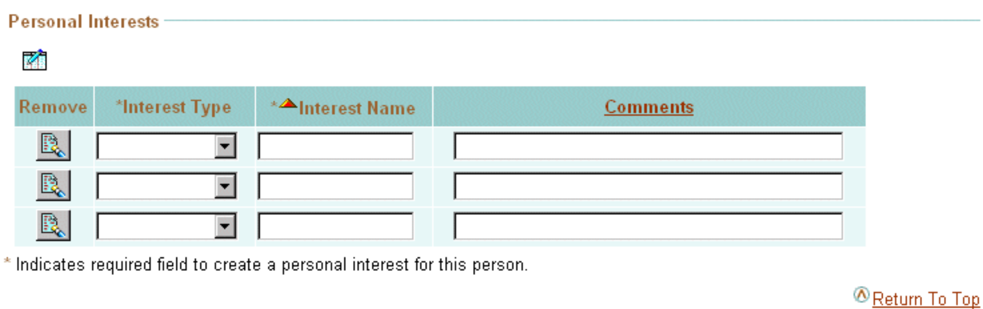
Indicate the products that this person in interested in within this section.



4. In the Product Interests section you can edit information such as:
   - Remove: To remove a product interest item, select the Remove check box
   - Product: Select a product from the drop down list
   - Comments: Enter comments directly into the comments field

Personal Interests

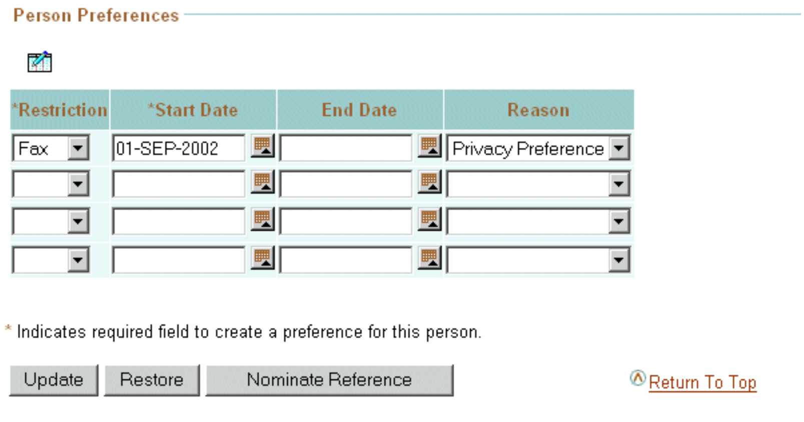
Indicate the personal interests of this person in this section.



5. In the Personal Interests section you can edit information such as:
   - Remove: To remove a personal interest item, select the Remove check box
   - Interest Type: Select an interest type from the drop down list
   - Interest Name: Enter the interest name
   - Comments: Enter comments directly into the comments field

Person Preferences

Indicate personal preferences in this section.



6. In the Person Preferences section you can edit information such as:
   - Preference: Indicate what preference you are entering
   - Topic: Select the topic from the drop down list
   - Topic Type: Select the type of topic from the drop down list
   - Start Date: Select a start date by clicking the calendar icon and choosing a date
   - End Date: Select an end date by clicking the calendar icon and choosing a date
   - Reason: Select a reason from the drop down list
   - Cascade: Cascade preference to contact points
7. Click **Update**.

10.3.5 Adding Classifications

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

Navigation

Customer > Organization, Person, or Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

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

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

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

10.3.6 Searching for a Person

Navigation

Customer > Person

Prerequisites

A person must exist.

Steps

Follow these steps to search for a person:

1. Search for a person using Using Quick Find or Advanced Search.
2. To select the person, click the person’s link.

10.3.7 Sending Collateral

Send collateral to your business contacts using this feature.

Prerequisites

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

Steps

Follow these steps to send collateral:

1. Select a customer. Use Using Quick Find or Advanced Search.
2. Click **Send Collateral**.

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

   The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list.
9. Click **Done**.

10.3.8 Creating and Maintaining Relationships

You can create Person to Organization and Person to Person Relationships from the Person subtab. Follow the instructions detailed below.

Related Implementation Information

Refer to the "Setting up Relationships" section, "Setting Up Relationships for Customers Upgrading from Previous Releases" of the *Oracle Sales Online Implementation Guide*. Information about setting the "Create Party" flag to "Yes" is related to this functionality. This setup can be performed by a System Administrator.

Following profile options must be set at the site level:

- OSO: Disable Page Level Security set to Yes
- OSO: Person Detail Security Check set to No

10.3.8.1 Creating a Person to Organization Relationship

Navigation

Customer > Person > Relationship

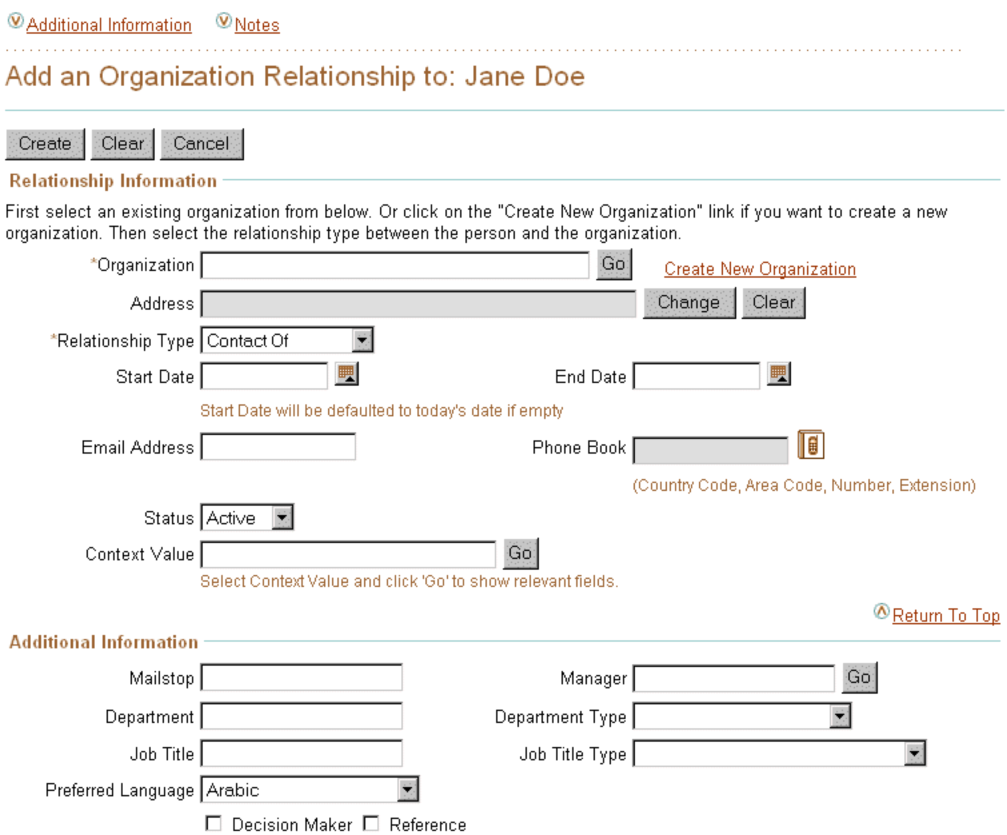
Prerequisites

None

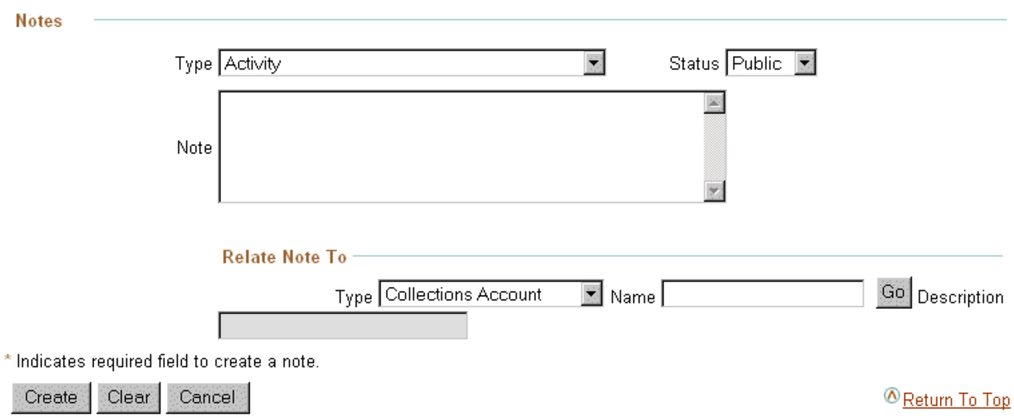
Steps

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

1. Select an existing organization. Or click the "Create New Organization" link if you want to create a new organization.



2. Select the relationship type between the person and the organization.
3. Optionally, select a start and end date. Start date will be defaulted to today's date if empty.
4. Enter email address and phone number, if known.
5. Select a Status from the drop down list.
6. Optionally, enter additional information for mailstop, department, job title, preferred language, manager, department type, and job title type.
7. In the Notes section, you can enter a note by selecting the note type from the drop down list, and entering the note text in the text field.



8. Click **Create**.

10.3.8.2 Creating a Person to Person Relationship

Use these steps to create a relationship between people. For example, Mary Kline reports to Ken Smith.

Navigation

Customer > Person > Relationships

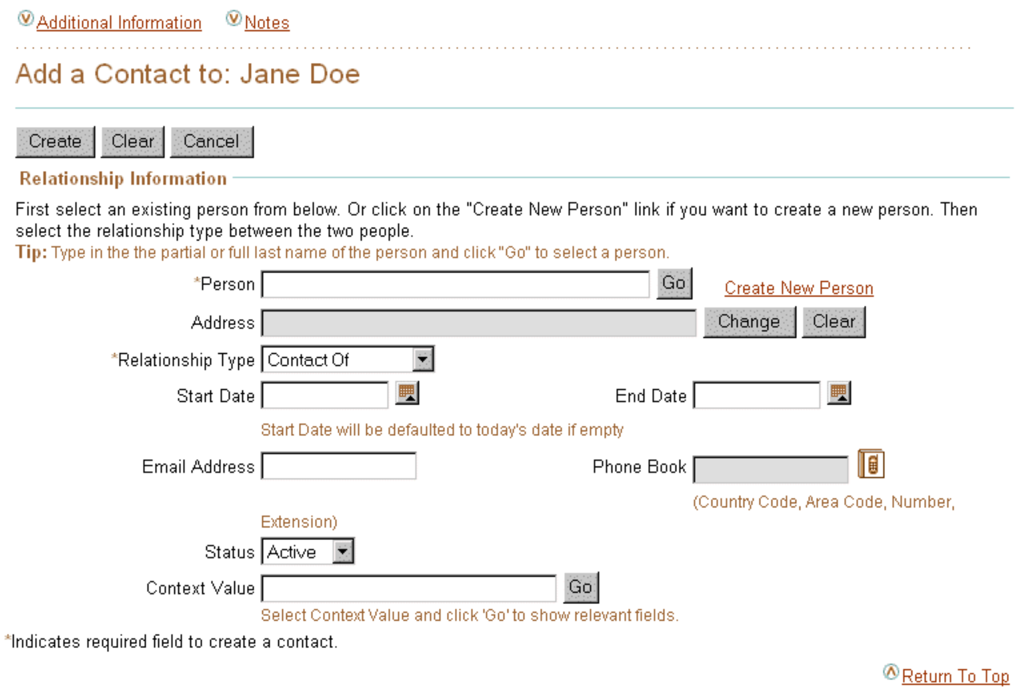
Prerequisites

None

Steps

1. Select an existing person. Or click on the "Create New Person" link if you want to create a new person.
2. Select the relationship type between the two people.

   Type in the partial or full last name of the person and click "Go" to select a person.



3. Optionally, enter a start and end date. Start date will be defaulted to the day you create the relationship if left empty.
4. Optionally, enter the email address and select a phone number by clicking the Phonebook icon.
5. Select a Status from the drop down list.
6. In the Notes section, you can enter a note by selecting the note type from the drop down list, entering the note text in the text field.
7. Click **Create**.

10.3.9 Leads

From the Person subtab, you can maintain lead details.

- Section 10.3.9.1, "Maintaining Lead Details"

10.3.9.1 Maintaining Lead Details

Navigation

Customer > Person > Leads

Prerequisites

A lead must exist.

Steps

Follow these steps to main lead details:

1. Search for a person using Using Quick Find or Advanced Search.
2. Click the person's link to select it.

   The Person Detail Main page opens.
3. Click **Leads**.

   The Leads summary page opens.
4. Select a lead by clicking the lead link.

   The Lead Detail page opens.
5. Update lead details.
6. Click **Update**.

10.3.10 Creating Opportunities

Navigation

Customer > Person > Opportunities

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person by clicking the person's link.

   The Person Detail page opens.
3. Click **Opportunities**.
4. Click **Create**.

   The Create Opportunity page opens.
5. From this page you can enter opportunity details, purchase items, contacts, and notes information. Required fields are marked with an asterisk.
6. Click **Create**.

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

10.3.11 Maintaining Quote Details

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

Navigation

Quote

Prerequisites

A quote must exist.

Steps

Follow these steps to maintain quote details:

1. Search for the person using Using Quick Find or Advanced Search.
2. Click the person's link to select it.

   The Organization or Person Detail Main page opens.
3. Click **Quotes**.

   The Quote Detail page opens.

4. Update quote information.
5. Click **Update**.

10.3.12 Notes

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

- Section 10.3.12.1, "Creating a Note"
- Section 10.3.12.2, "Viewing a Note"

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

10.3.12.1 Creating a Note

Navigation

Customer > Person > Notes

Prerequisites

None

Steps

Follow these steps to create a note:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person by clicking the person’s link.

   The Person Detail page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.

   You can change the default type by changing the Profile. Click the Profiles icon in the upper right corner of the application page.
5. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
6. Enter your notes in the text box.

7. Click **Create**.

Note: Once a note is created, it cannot be updated.

10.3.12.2 Viewing a Note

Navigation

Customer > Person > Notes

Prerequisites

None

Steps

Follow these steps to view a note:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person by clicking the person's name link.

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

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

   Click **All Notes** to view all the notes in a printer-friendly format. Click the **Text** icon to see the entire note.

10.3.13 Sales Teams

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

The Sales Team is divided into two sections:

- Internal: Salespeople or internal users

- External: Partners and Partner users

  The partner and partner contacts can be added to the External Sales Team of an organization, lead, or opportunity if:

  – Partner has partner profile created.

  – Partner should be a sales partner in order to see partner contacts.

  – Partner contact should be a valid user and resource.

  – Partner needs to be added to the Sales team before the contact can be added.

You can filter sales teams by the following criteria:

- Sales Group list of values
- Sales person list of values
- Territory Location list of values
- Roles dropdown

Flexfields will not be included as a filter criteria.

The screen will always show the entire list when the user navigates to the sales team page. The filter parameters cannot be personalized.

See Also

- Section 10.3.13.1, "Adding a Sales Team Member"
- Section 10.3.13.2, "Adding a Partner to a Sales Team"
- Section 10.3.13.3, "Adding a Resource Team to a Sales Team"
- Section 10.3.13.4, "Removing a Sales Team Member"

Related Profiles

OS: Always Put Creator on Sales Team

When a salesperson has sales team access to customer records, the creator of the record is always added to the sales team. If a salesperson has full/prospecting access, then the profile "OS:Always Put Creator on Sales Team", is used to decide whether the salesperson is added to the customer sales team. If the profile is set to "Yes", then the salesperson is added to the sales team. If set to "No", the user is not added to the sales team.

10.3.13.1 Adding a Sales Team Member

Navigation

Customer > Person > Sales Team > Internal

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person by clicking the person’s link.

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

10.3.13.2 Adding a Partner to a Sales Team

Navigation

Customer > Person > Sales Team > External

Prerequisites

None

Steps

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

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person by clicking the person's link.

   The Person Detail page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.

   It is recommended that you search by last name only.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

10.3.13.3 Adding a Resource Team to a Sales Team

Resource Teams can also be used to add salespersons to the sales team. The resource team is an independent list of users/sales persons identified by a team name. When you want to add the same set of users to several opportunities, using a resource team makes the process much faster. Resource teams are created and maintained in the CRM Foundation Resource Manager.

Navigation

Customer > Person > Sales Team > Internal

Prerequisites

None

Steps

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

1. Search for a person using Using Quick Find or Advanced Search.
2. Click the person's link to select it.

   The Person Detail page opens.
3. Click **Sales Team**.
4. In the Add a Resource field, enter the resource name using % as a wildcard, and click **Go**.

5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

For sales teams, if you add a sales person to the sales team using Add Resource Team, and if a resource team contains partners, then the partners will not appear in the internal sales team. Partner resources will appear in the external sales team. This applies to Leads, Opportunities, and Customers.

10.3.13.4 Removing a Sales Team Member

Navigation

Customer > Person > Sales Team > Internal

Prerequisites

A sales team member must exist on the sales team.

Steps

Follow these steps to remove a sales team member:

1. Search for a person using Using Quick Find or Advanced Search.
2. Click the person link to select it.

   The Person Detail page opens.
3. Click **Sales Team**.
4. Locate the sales person that you want to remove from the sales team.

   Note: You cannot remove the salesperson if they are the only sales team member assigned to the customer.
5. Select the **Remove** check box.
6. Click **Update**.

10.3.14 Tasks

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

- Section 10.3.14.1, "Creating a Task"
- Section 10.3.14.2, "Maintaining Task Details"

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

10.3.14.1 Creating a Task

Navigation

Customer > Person > Tasks

Prerequisites

None

Steps

Follow these steps to create a task:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person from the Search Results page by clicking the person's name link.

   The Person Detail page opens.
3. Click **Tasks**.
4. Click **Create**.
5. Select Task Type from the drop down list.
6. If the task is a private task, select the **Private** box. This task can only be assigned to you.
7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.

13. Enter the name of the person you are assigning the task, click **Go**.
14. The "Relate to" field defaults to the person, click **Go**.

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

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

10.3.14.2 Maintaining Task Details

Navigation

Customer > Person > Tasks

Prerequisites

A task must exist.

Steps

Follow these steps to view a task:

1. Search for a person using Using Quick Find or Advanced Search.
2. Click the person's link.

   The Person Detail main page opens.
3. Click **Tasks**.

   The summary table displays all tasks for the person.
4. Click the task link to view details.

   The Task Detail page opens.
5. Click **Update**.

10.3.15 Interactions

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

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

10.3.15.1 Viewing Interactions

Navigation

Customer > Person > Interactions

Prerequisites

Interactions must exist.

Steps

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

Follow these steps to view interactions:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person from the Search Results page by clicking the person's name link.

   The Person Detail page opens.
3. Click **Interactions**.
4. You can select filters such as Media Type, Activity, Source, and Date Ranges.
5. Click **Apply**.

For more detailed information about interactions, please refer to the *Oracle CRM Application Foundation User Guide*.

10.3.16 Attachments

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

- Section 10.3.16.1, "Adding an Attachment"
- Section 10.3.16.2, "Viewing an Existing Attachment"

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

10.3.16.1 Adding an Attachment

Navigation

Customer > Person > Attachments

Prerequisites

None

Steps

Follow these steps to add an attachment:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person.

   The Person Detail page opens.
3. Click **Attachments**.
4. Click **Add**.

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

10.3.16.2 Viewing an Existing Attachment

Navigation

Customer > Person

Steps

1. Search for a person using Using Quick Find or Advanced Search.
2. Select a person.

   The Person Detail page opens.

3. Click the attachment link from the person's detail page.

10.3.17 Accounts

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

- Section 10.3.17.1, "Creating Accounts"
- Section 10.3.17.2, "Maintaining Account Details"
- Section 10.3.17.3, "Viewing Account Sites"
- Section 10.3.17.4, "Viewing Account Roles"
- Section 10.3.17.5, "Viewing Account Relationships"

10.3.17.1 Creating Accounts

Navigation

Customer > Person > Accounts

Prerequisites

None

Steps

Follow these steps to create an account:

1. Search for the person using Using Quick Find or Advanced Search.
2. Click the person link to select it.

   The Person Detail Main page opens.
3. Click **Accounts**.

   The Account Summary page opens with all accounts that exist for the Person.
4. Click **Create**.

   The Create Account page opens.

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

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

5. Click **Create**.

10.3.17.2 Maintaining Account Details

Navigation

Customer > Person > Accounts

Prerequisites

An account for a person must exist.

Steps

Follow these steps to view an account:

1. Search for the person using Using Quick Find or Advanced Search.
2. Click the person link to select it.

   The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

The Account Detail page opens.

The following table describes the Account Detail fields.

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

5. Edit information.
6. Click **Update**.

10.3.17.3 Viewing Account Sites

Navigation

Customer > Person > Accounts

Prerequisites

An account site must exist.

Steps

Follow these steps to view an account site:

1. Search for the person using Using Quick Find or Advanced Search.
2. Click the person link to select it.

   The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account’s link.

   The Account Detail page opens.
5. Click **Sites**.
   1. To add a site, click **Add Site**.
   2. Select an address that already exists
   - Change the site use by selecting from the drop down list
   - Select the Primary check box, if applicable
   - Change the site Status by selecting from the drop down list
   3. To view site details, click the site **Address** link.
   4. To view site history, click **History**.
   5. To map the site address, click **Map It**.

10.3.17.4 Viewing Account Roles

Navigation

Customer > Person > Accounts

Prerequisites

An account role must exist.

Steps

Follow these steps to view an account role:

1. Search for the person using Using Quick Find or Advanced Search.
2. Click the person link to select it.

   The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

   The Account Detail page opens.
5. Click **Roles**.
   1. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using % as a wildcard. Click **Go**.
   2. To remove a role, locate the related account and click the Erase icon.
   3. To change the role type, select from the drop down list.
   4. To indicate a primary role, select the Primary Role radio button.
   5. To change the status, select from the drop down list.
   6. To find an address, enter the full or partial address using % as a wildcard. Click **Go**.
   7. Select an effective date by clicking the calendar icon and choosing a date.
   8. Select an end date by clicking the calendar icon and choosing a date.
6. Click **Update**.

10.3.17.5 Viewing Account Relationships

Navigation

Customer > Person > Accounts

Prerequisites

An account relationship must exist.

Steps

Follow these steps to view an account relationship:

1. Search for the person using Using Quick Find or Advanced Search.
2. Click the person link to select it.

The Person Detail Main page opens.

3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.

   The Account Detail page opens.

5. Click **Relationships**.
   1. To remove a relationship, locate the related account and click the Erase icon.
   2. To find a related account number, enter the account number and click **Go**.

      The related account name will populate the field.

   3. To change the relationship type, select from the drop down list.
   4. To change the status, select from the drop down list.
   5. To indicate a reciprocal relationship, select the Reciprocal check box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
6. Click **Update**.

10.3.18 360 Degree View

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

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

10.3.18.1 Viewing 360 Degrees

Navigation

Customer > Person > 360 View

Prerequisites

In order to use the 360 degree view, you must have iStore installed to view orders, Install Base to view products installed, and iSupport to view the Invoices, Returns, Service Requests, and Quotes. Additionally, Oracle Projects must be installed to view projects.

Steps

Follow these steps to use 360 degree view:

1. Search for a person using Using Quick Find or Advanced Search.
2. Select the person from the search results.
3. Click **360 View**.
4. You can view summary pages for each of the following by clicking each link:

- Orders:

  Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.

- Invoices:

  Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.

- Service Requests:

  A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.

- Products:

  This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.

- Returns:

  Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.

- Projects:

You can view the projects for the associated customer organization or person. Drill down to view the project details.

- Campaigns:

  Provides a list of campaigns in which the customer was involved. This is populated from Oracle Marketing.

- Events:

  A list of events onto which the customer has enrolled. This is populated from Oracle TeleSales.

5. Click a link to view the details of any available item.

10.4 Contacts Subtab

A contact is a relationship between a person and a customer. A customer may be an organization, or a person.

Oracle Sales Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a contact is a person who has a relationship (usually an employee/employer relationship) with the organization (or another person) with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, i.e., an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet number, or tax identification number.

An example:

Person A is a Business to Consumer customer and an employee of Company B. This relationship (employee of) makes Person A a contact of Company B.

See Also

- Section 10.4.1, "Personalize Contact Summary"
- Section 10.4.2, "Creating a Contact"
- Section 10.4.3, "Searching for a Contact"
- Section 10.4.4, "Maintaining Contact Details"
- Section 10.4.5, "Adding Classifications"
- Section 10.4.6, "Managing Contact Notes"

- Section 10.4.7, "Creating a Contact Task"
- Section 10.4.8, "Managing Contact Attachments"
- Section 10.4.9, "Managing Contact Interactions"
- Section 10.4.10, "Sending Collateral from the Contact Summary Table"

10.4.1 Personalize Contact Summary

You can personalize your contact summary page to fit your needs. Follow the instructions outlined in the steps below.

Navigation

Customer > Contact

Prerequisites

None

Steps

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

10.4.2 Creating a Contact

Navigation

Customer > Contact

Prerequisites

None

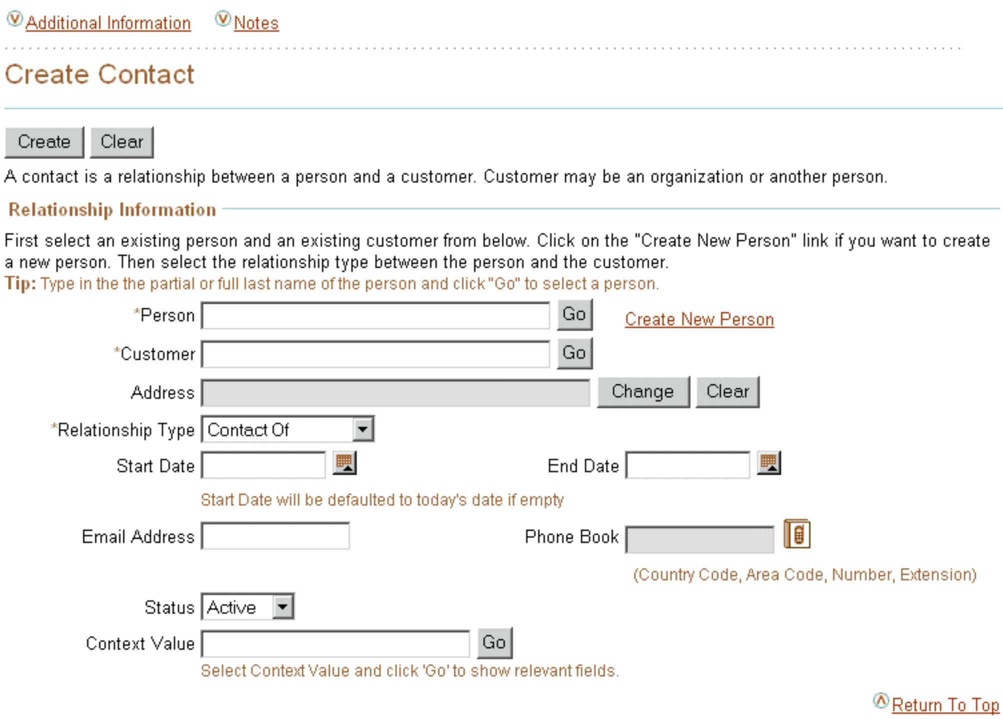
Related Profiles

OS: Create Contact Privilege: If set to "Yes", user can create contacts. If set to "No" user cannot create contacts.

Steps

1. Click **Create**.

   The Create Contact page opens. Quick links at the top of the page allow for easy navigation to "Additional Information" or "Notes". The "Return to Top" links allow you to navigate back to the top of the page quickly.



2. First select an existing person and an existing customer.

   Type in the full or partial last name of the person and click **Go** to select a person. Select a customer for which the person is a contact.

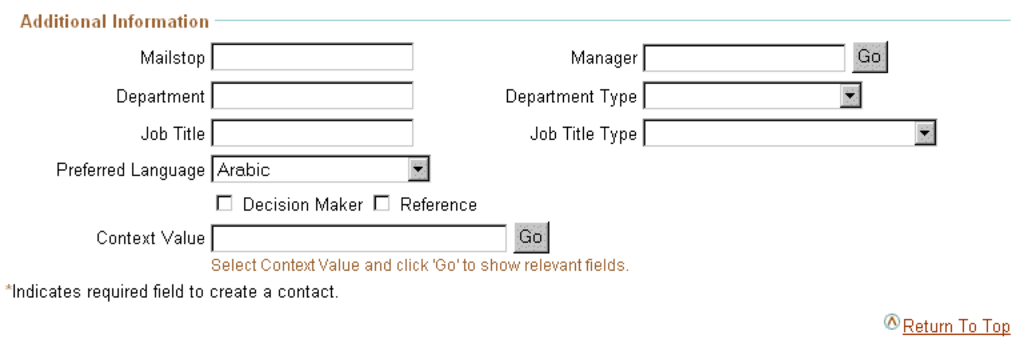
3. Click the "Create New Person" link if you want to create a new person.

4. Select the relationship type between the person and the customer.

5. Select a Start Date and End Date by clicking the Calendar icon and choosing dates. Start Date will be defaulted to today's date if empty.
6. Enter the Email Address for the contact.
7. Select a Phone Number from the Phone Book by clicking the phone book icon.
8. Select a Status from the drop down list of values.
9. Select Context Value and click **Go** to show relevant fields.

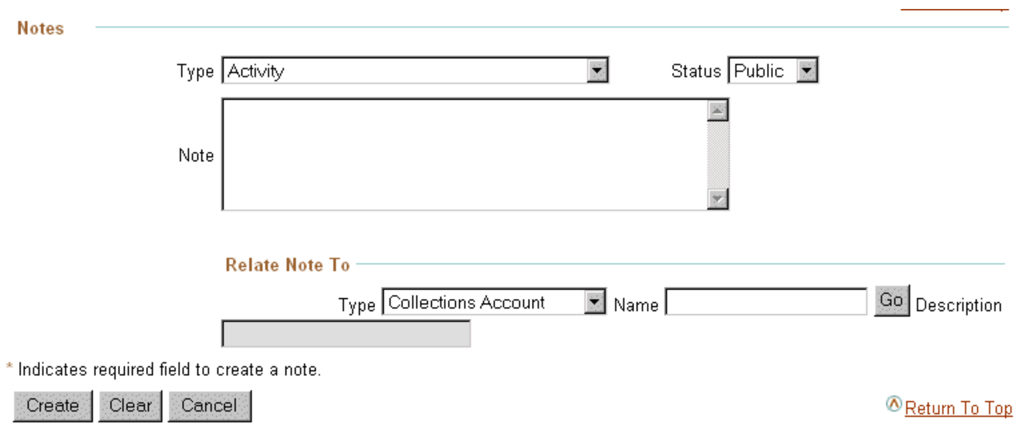
Additional Information

Enter additional information about this contact in the section shown below. None of the following fields are required.



Notes

Enter notes in the section shown below.



10. Select the Type from the drop down list.
11. Select the note Status.
12. Enter the note text in the text box provided.
13. Relate the note to an item, if desired.
14. Click **Create**.

10.4.3 Searching for a Contact

Navigation

Customer > Contact

Prerequisites

A contact must exist.

Steps

1. You can search for a contact using Using Quick Find or Advanced Search.
2. To select the contact, click the contact link.

10.4.4 Maintaining Contact Details

Keeping contact details current is an important part of Oracle Sales Online's functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

Navigation

Customer > Contact

Prerequisites

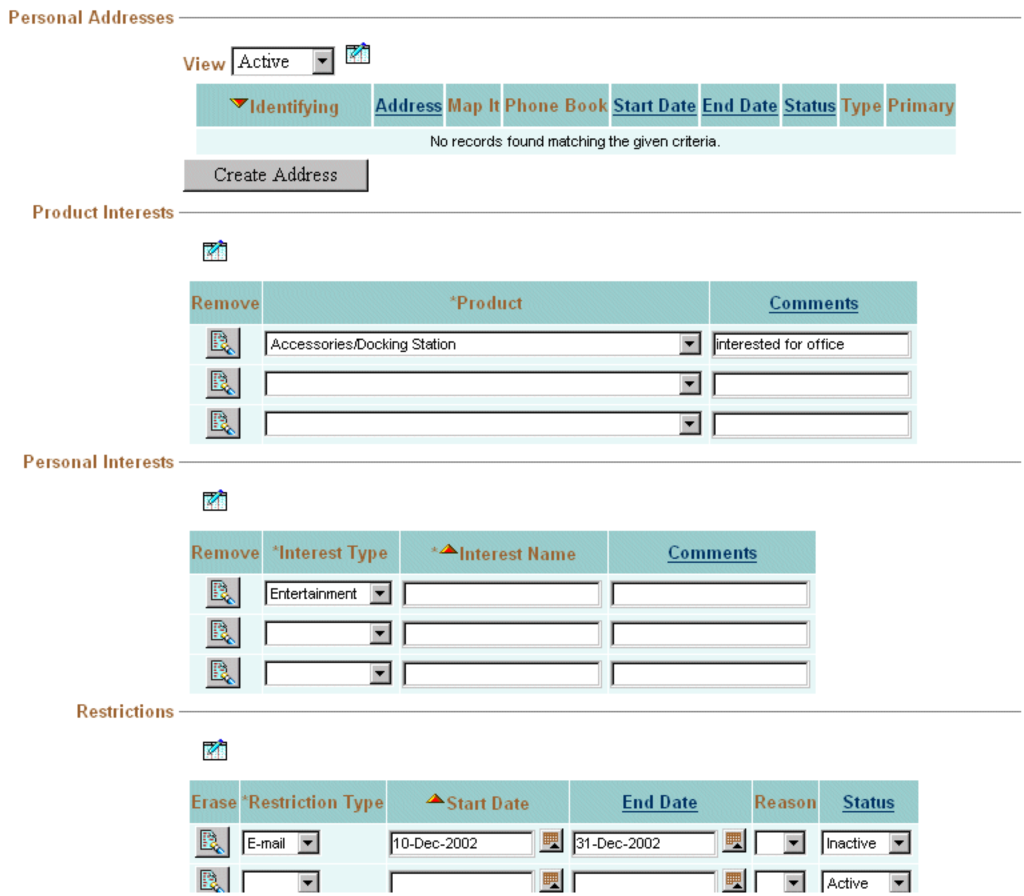
A contact must exist.

Steps

1. You can search for a contact using Using Quick Find or Advanced Search.
2. Click the relationship link in the summary table.

   Contact details consist of the following areas:

   - General Information
   - Personal Addresses
   - Product Interests
   - Personal Interests
   - Restrictions
3. To create a personal address, click the **Create Address** button.
4. To add product interest information, enter the required information directly into the summary table. This includes information about the products that the contact is interested in purchasing. Additional product interests can be added on the lines available on the table. Enter comments for each product interest.
5. To add personal interest information, enter the required information directly into the summary table. This includes personal information about the contact such as, entertainment, hobbies, or sports. Save your changes.
6. To add restrictions, enter information into the fields provided. You can select a Restriction Type, a Start and End Date for the restriction, the reason for the restriction and the Status of the contact. To remove a restriction, click the Erase icon. Save your changes.



7. Click **Update**.

10.4.5 Adding Classifications

You can add classifications to a contact.

Navigation

Customer > Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

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

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

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

10.4.6 Managing Contact Notes

Navigation

Customer > Contact > Notes

Prerequisites

None

Steps

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

Note: Once a note is created, it cannot be updated.

10.4.7 Creating a Contact Task

Navigation

Customer > Contact

Prerequisites

None

Steps

1. Search for a contact using Using Quick Find or Advanced Search.
2. From the search results, click the relationship link.
3. Click **Tasks**.
4. Click **Create**.

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

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

10.4.8 Managing Contact Attachments

Navigation

Customer > Contact

Prerequisites

None

Steps

1. Search for a contact using Using Quick Find or Advanced Search.
2. From the search results, click the relationship link.
3. Click **Attachments**.
4. Click **Add**.

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

10.4.9 Managing Contact Interactions

Navigation

Customer > Contact > Interactions

Prerequisites

None

Steps

1. Search for a contact using Using Quick Find or Advanced Search.
2. To select the relationship details, click the relationship link.
3. Click **Interactions**.
4. Click a link to view details.

10.4.10 Sending Collateral from the Contact Summary Table

Navigation

Customer > Contact

Steps

Follow these steps to send collateral:

1. Select the contact’s Collateral Recipient check box to send collateral to the contact or use the **Select All** button to send collateral to all contacts on the summary table.
2. Click **Send Collateral**.
3. You will be prompted to complete the fulfillment request.

10.5 Contact List Subtab

Sales people can generate contact lists to assist them in planning their sales calls. Contact lists can be generated on the basis of parameters, including contact profiles, relationships, addresses, and classification information. For example, a sales person could generate a list of all Vice Presidents of Sales in the insurance industry in the Northeastern United States. Users can manually add contacts, remove contacts, and save a list. Lists can be designated private or public.

There are two ways to create a contact list:

- Section 10.5.1, "Creating a Contact List Using Filters"
- Section 10.5.2, "Creating a Contact List by Manually Adding Contacts"

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

- Section 10.5.3, "Updating Contact, Customer, and Relationship Details"
- Section 10.5.4, "Saving a Contact List"
- Section 10.5.5, "Downloading a Contact List"
- Section 10.5.6, "Personalizing the Summary Table Display"
- Section 10.5.7, "Adding Additional Filters to a Contact List"
- Section 10.5.8, "Viewing List Filters"
- Section 10.5.9, "Manually Add a Contact to a List"
- Section 10.5.10, "Removing a Contact From a List"
- Section 10.5.11, "Removing a List"
- Section 10.5.12, "Call Sheet Overview"
- Section 10.5.13, "Generating a Call Sheet"

- Section 10.5.14, "Viewing Call Sheet Details"
- Section 10.5.15, "Sorting a Call Sheet"
- Section 10.5.16, "Selecting Multiple Contacts"
- Section 10.5.17, "Adding a Task"
- Section 10.5.18, "Sending Collateral"
- Section 10.5.19, "Viewing Calendar Tasks"

Related Profiles

OSO: Create a list with filter conditions: The site level default value is "No", which means that a contact list will be created manually by default. You can edit this profile from the Profiles > Customer.

See Also

Section 3.5, "Setting Profiles" on page 3-12

10.5.1 Creating a Contact List Using Filters

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

Navigation

Customer > Contact List

Prerequisites

User must have access to existing contacts.

Steps

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

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

Use the following filter categories:

a. **Contact** includes:

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

b. **Classification**: Information about the classification category that the contact has been identified as belonging to.

6. After you have selected the filters that you want to choose, click **Apply Filter**.

   If you want to clear the filters you have selected, click **Restore**. To quit creating the list and return to the List Summary Page, click **Cancel**. Please note, once you have applied a set of filters to create a list, you cannot refresh this list. You can still apply more filters on this list though. In addition, sales team filters will only appear when you are creating a list from scratch.

7. A list using the filters you have selected is returned.

10.5.2 Creating a Contact List by Manually Adding Contacts

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

Navigation

Customer > Contact List

Prerequisites

User must have access to existing contacts.

Steps

1. Click **Create Contact List**.

   A contact list page with no contacts opens. You can manually add contacts to the list here.

2. Select the "Manually Add Contacts" radio button.
3. Enter a name that will be used to identify this list.
4. Click **Create**.

5. In the "Add a Contact" field, enter the full or partial contact name using % as a wildcard.
6. Click **Go**.
7. From the search results, select the contact you want to add to the list.
8. Click **Select**.
9. Click **Save**.

10.5.3 Updating Contact, Customer, and Relationship Details

Navigation

Customer > Contact List

Steps

Select the information that you want to update by clicking the related link. For example, to update the Contact details, click the link in the Contact column.

Save your changes.

10.5.4 Saving a Contact List

Navigation

Customer > Contact List

Steps

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

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

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

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

10.5.5 Downloading a Contact List

You can download a contact list to a spreadsheet by clicking the **Download to CSV**.

10.5.6 Personalizing the Summary Table Display

You can personalize the way the summary table is displayed on the page by clicking the Personalize icon.

Navigation

Customer > Contact List

Steps

1. Click the **Personalize** icon.

   The Personalize Contact List page opens.

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

10.5.7 Adding Additional Filters to a Contact List

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

Navigation

Customer > Contact List

Prerequisites

You must be the owner of the list in order to modify the list. If you are not the owner, the list you create will be a new list based on the existing list.

Steps

1. Click **Apply Filters**.

   The "List of Filters" page opens. In the Filters section you can enter criteria to create the contact list.

   Use the following filter categories:

   a. **Contact** includes:

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

   b. **Classification**: How all classifications you choose will be related to one another for the filter. How you want the classification criteria to be related to each other by selecting the "And Condition" or "Or Condition" radio button.

2. After you have selected the filters that you want to choose, click **Apply Filter**.
3. If you want to clear the filters you have selected, click **Restore**. To quit adding filters to the list and return to the Contact List Page, click **Cancel**.

10.5.8 Viewing List Filters

You can view the filters you have applied to a list two ways.

- From the summary table your saved lists are displayed. Click the**View** link under the List Filters column.
- After you have created a new list, you can view the filters from the contact list page by clicking the **List Properties** link. The view-only page shows the filters that you used for the list and the date the filters were applied.

10.5.9 Manually Add a Contact to a List

After you have created a contact list, you can manually add contacts to the list.

Navigation

Customer > Contact List

Prerequisites

You must be the owner of the list.

Steps

1. In the "Add a Contact" field, enter the name of the contact you want to add. Use the % as a wild card.
2. Click **Go**.
3. Select a contact from the search results.

10.5.10 Removing a Contact From a List

Navigation

Customer > Contact List

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

10.5.11 Removing a List

Navigation

Customer > Contact List

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

10.5.12 Call Sheet Overview

After you have created a list, you may want to generate a call sheet. A call sheet has additional information on your contacts which provides an interactive page.

Overview

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in your Contact List. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

From the contact list:

- Section 10.5.13, "Generating a Call Sheet"

- Section 10.5.14, "Viewing Call Sheet Details"
- Section 10.5.15, "Sorting a Call Sheet"
- Section 10.5.16, "Selecting Multiple Contacts"
- Section 10.5.17, "Adding a Task"
- Section 10.5.19, "Viewing Calendar Tasks"
- Section 10.5.20, "Updating Contact, Customer, and Relationship Details"

10.5.13 Generating a Call Sheet

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. "Executing a Call Sheet" refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

Prerequisites

None

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click the **Generate Call Sheet** button.

The application will display information about the contacts. To remove contacts from the call sheet, select the "Remove" checkbox and click **Update**.

10.5.14 Viewing Call Sheet Details

Prerequisites

None

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

The details you see are described in the following table:

Field	Description
Select	To select the client for an action (send email, collateral, or add interaction), select the checkbox.
Priority	Indicates the priority given to the client.
Client/Contact	The client or contact name.
Title	The contact title.
Phone	Phone number
Email	Email address
Primary Address	Address
Country	Country
Comments	Click View All to see all comments.
Calendar	Calendar

10.5.15 Sorting a Call Sheet

You can view the call sheet with the basic view which lists contacts grouped by client.

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps

This is the default view.

1. Select a contact list.
2. Click **Generate Call Sheet**.

10.5.16 Selecting Multiple Contacts

Prerequisites

None

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. To select multiple clients, select each client by choosing the Select check box in the first column of the client's row on the call sheet.

You can also use the "Select All" link to select all contacts on the current page or "Select None" link to select none, links at the bottom of the page.

10.5.17 Adding a Task

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps for Alternative 1

1. Select a contact list.

2. Click **Generate Call Sheet**.
3. Select the client by choosing the Select check box in the first column of the client's row on the call sheet.
4. From the drop down of the Select Client and Perform Action list, select Create Task.
5. Click **Go**.
6. Enter the information for the task you are creating. Most fields will default to match the settings you have already done. Required fields are indicated with an asterisk.
7. Click **Create**.

   Create and Create Another button will commit changes in this window and forward this page to Create Task and Task Summary page for the user to create another task. Click Clear to undo what you have entered.

Steps for Alternative 2

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click the Edit icon on the call sheet.

Steps for Alternative 3

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click an icon on the weekly calendar on the call sheet.

10.5.18 Sending Collateral

You can send collateral material from a call sheet.

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. From the drop down list, select "Send Collateral".
4. Choose the "Select" checkbox to indicate the contacts for which you want to send collateral.
5. Click **Go**.

10.5.19 Viewing Calendar Tasks

Prerequisites

None

Navigation

Customer > Contact List > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Tasks are listed in the far right column with a check mark. To view, edit, or add a task, click the check mark, double check mark, or cross mark.
4. The Create Task page opens. At the bottom of the page, all tasks are listed with a link to the details.

10.5.20 Updating Contact, Customer, and Relationship Details

Navigation

Customer > Contact List > Call Sheet

Steps

Select the information that you want to update by clicking the related link. For example, to update the Contact details, click the link in the Contact column.

Save your changes.

10.6 Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab. Available reports are listed below:

- Section 10.6.1, "Viewing the Customer Classification Report"
- Section 10.6.2, "Viewing the Task Classification Report"

10.6.1 Viewing the Customer Classification Report

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

Navigation

Customer > Reports > Customer Classification Report

Steps

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

10.6.2 Viewing the Task Classification Report

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

Navigation

Customer > Reports > Task Classification Report

Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding "P" or "C" to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.
6. Optionally, enter or select one or more of the following task filters:
   a. Name
   b. Number
   c. Type
   d. Date Range
   e. Priority
   f. Status
   g. Include Private
7. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
8. Select your sorting options from the available drop down lists.
9. Click **Run Report**.

11

Partner Tab

Sections in this chapter include:

11.1 Overview of the Partner Tab

The Partner tab is comprised of two subtabs, Partner and Contact. By default, the Partner tab opens to the Partner summary page. Click the Contacts subtab to open the Partner Contacts summary page. Use the Partner tab to create partners and subsequently associate them with sales opportunities.

It is not mandatory to install Oracle Partners Online in order to use the Partner tab within the Sales Online product.

Refer to the Oracle Partners Online documentation for more information about using partners functionality.

11.1.1 Partner Overview

A partner is any type of alliance or strategic agreement between one entity and another. From the Partner tab, you can create new partners and maintain the details of existing partners. Once a partner is created, it can be added to an external sales team.

There are three types of partners:

- **Exchange Partners:** Exchange Partners can participate in the opportunity exchange system between multiple parties, which can be vendors and partners. Two or more companies using Sales Online can exchange/share opportunity information via the internet. This is the co-selling model.

  (A vendor is the selling company using Sales Online. For example, if Oracle was selling to end customer X via Partner Y, Oracle would be the vendor, Y would be the partner and X would be the end customer).
- **Sales Partners:** A Sales Partner has a specific partner agreement that allows the vendor to pass a sales deal to that partner using Oracle Partners Online (POL).
- **General Partners:** General Partners are any parties in the CRM modules that have a partner relationship with another organization or person. (General Partners include Sales and Exchange Partners. i.e. by definition Sales and Exchange Partners are also General Partners.)

Reference

Please refer to the *Oracle Partners Online User Guide* guide for information.

11.1.2 Creating a Partner

This procedure is used when an organization does not yet exist. A different procedure will be used to create a partner relationship for an existing organization.

Navigation

Partner

Prerequisites

A user must be associated with some internal organization . When a user tries to create a partnership, Oracle Sales Online creates the partnership with the internal organization that the user is associated with.

Related Profiles

The profile "PV: Default Vendor Organization" must be set to the internal organization that is created in step one of this procedure.

Additionally, bounce the application server after the profile is reset.

Steps

Follow these steps to create a partner:

1. Create an internal organization by checking the "Internal" option on the organization detail page of the organization you want to be associated with. By default an organization is "External". This will be the organization that partners are created with for this user.

1. Click **Create**.

   The Create Partner page opens.

2. Enter information into required fields.

3. Optionally, enter additional information.

4. Click **Create**.

Reference

Please refer to the *Oracle Partners Online User Guide* guide for information.

11.1.3 Creating a Person/Contact

Once a partner contact is created, this person can be added to the external sales team.

Follow these steps to create a person-to-organization relationship.

Navigation

Navigate to the Partner's relationship page.

Prerequisites

None

Steps

1. To create a person-to-organization relationship, scroll down until the Person-to-Organization Relationships fields appears.

2. Click the **Add Relationship** button.

   The relationship screen is displayed.

the name in the Selec

> **Note:** Click the **Create Person** button to create a new person.

3. Select the person from the search results.

4. Choose the relationship type, such as "Employee of" or "Contact of".
5. Enter or select:
   - start date
   - person’s job title
   - department, and other related information
6. Optionally, enter a note for the relationship.
7. Click **Create**.

To find more information about partners, please refer to the Oracle Partners Online documentation.

Reference

Please refer to the *Oracle Partners Online User Guide* guide for information.

12

Compensation Tab

Sections in this chapter include:

- Section 12.1, "Overview of the Compensation Tab"

12.1 Overview of the Compensation Tab

Oracle Sales Online's Compensation tab is divided into five subtabs: Year to Date Summary, Planning, Compensation Plan, Income Planer, and Reports.

Depending on your sales role, you can use the Compensation tab to perform the following functions:

- Year to Date Summary: This report is an overview of a salesperson's achievements, commission and bonus earnings and advances or draws. This report is the default screen displayed when selecting the Compensation Tab in Oracle Sales Online.

  The figures are grouped by period and by plan element. The setup administrator can control which plan element appears as a quota or bonus category. The payout section is grouped by earnings type and by period.

- Planning subtab: The Planning subtab is separated into two areas: My Compensation Groups and Updating Quota Estimate.

  My Compensation Group: A Compensation Group is a number of sales-people who share the same rollup relationship. This application displays a summary of the compensation groups where you are a member and those of your direct reports. Select the Compensation Group for which you wish to view details.

  My Quota Estimate: My Quota Estimate contains information about the quota components: the compensation group, organization, sales role, and effective dates of the sales role and hierarchy. This screen allows the salesperson, to communicate to sales management what you think your new quota should be for the next compensation plan cycle. Your manager and your manager's manager have access to view your quota estimate and they can take your estimate into consideration when allocating your final quota to you.

- Compensation Plan subtab: The Compensation Plan subtab provide managers the ability to view the plans of their subordinates and distribute them for approval to their salespeople for compensation plan approval using automated workflows. The salespeople review their compensation plan information for a specified date range. Once the plan is reviewed, the salesperson can accept the plan. Click the link in the Sales Role column to view the Compensation Plan Detail.
- Compensation Plan History: This is a history of the compensation plan from creation to acceptance. This is not a history of actual commissions paid. The history displays each status, with the date and user. The status of compensation plans is sequential and is determined by user responsibilities.

  The following is a brief summary of the statuses and the levels of user responsibility associated with them:

  Locked, Generated, Submitted: These statuses can be generated by the Sales Force Planning Manager or the Financial Manager.

  Approved: A Contract Approver can establish this status. This person would be someone setup as the designated approver.

  Issued: The Sales Force Planning Manager or Financial Manager can distribute the compensation plan for online acceptance by individual sales representatives.

  Accepted: Individual salespeople can accept the compensation plans that have been issued to them, online.
- Income Planner subtab: The Planning subtab enables a salesperson to calculate projected income based on estimated sales forecasts.
- Reports subtab: The Reports subtab enables the salesperson to view compensation reports by selecting the links under Report Name. The data from these reports are based on the Incentive Compensation calculations from processed orders and transaction in the Oracle Financial suite of products.

  The following seeded reports are available:

Year To Date Summary

This report is an overview of a salesperson's achievements, commission, and bonus earnings and advances or draws. This report is the default screen displayed when selecting the Compensation Tab in Oracle Sales Online.

The figures are grouped by period and by plan element. The setup administrator can control which plan element appears as a quota or bonus category. The payout section is grouped by earnings type and by period.

This summary is also available when clicking the Year to Date Summary subtab.

Quota Performance

This report is a snapshot of sales achievement and earnings. Achievements are shown against interval-to-date quota and annual quota. Earnings total is broken down by period-to-date and interval-to-date.

Commission Statement

This report shows transaction details broken down by period for a salesperson.

Reference

For information about using the compensation functionality, please refer to the *Oracle Incentive Compensation User Guide.*

13

Fulfillment Tab

Sections in this chapter include:

- Section 13.1, "Overview of the Fulfillment Tab"
- Section 13.1.1, "Sending Collateral"

13.1 Overview of the Fulfillment Tab

The Fulfillment tab provides the ability to send soft copy collateral to a selected list of people using the Fulfillment Wizard. You can send collateral to a person or contact at an organization, but not to the organization itself. The wizard walks you through the steps to select the list of predefined documents to be sent. A process is submitted to bundle the documents and send the collateral to each person by the selected output method. Collateral comes from Oracle Fulfillment, part of CRM Foundation.

13.1.1 Sending Collateral

Send collateral to your business contacts using this feature.

Navigation

Fulfillment

Prerequisites

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

Steps for Alternative 1

Follow these steps to send collateral:

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

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

   The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list, and click **Done**.

Steps for Alternative 2

Optionally, you can send collateral by following these steps.

1. From the **Fulfillment** tab, click the **Status** subtab.
2. Click **Create**.
3. Enter Person Search criteria, click **Search**.
4. Click **Send Collateral**.

   The Fulfillment Wizard page opens.
5. Select a Template from the drop down list.
6. Click **Continue**.
7. Select a Master Document by selecting the check box, click **Continue**.
8. Select Collateral, click **Continue**.
9. Select the Output Method (email) from the drop down list, and click **Continue**.

   The Fulfillment Request Confirmation page opens.
10. Select the Priority from the drop down list, and click **Done**.

Note: Only Master Documents (mail merge template) and Collateral (attachments to email) attached to a template in MES (setup in Fulfillment Manager) will appear for selection once a template is selected for a fulfillment request. You can use only one template per request.

14

Administration Tab

Sections in this chapter include:

14.1 Overview of the Administration Tab

The Oracle Sales Online Administration tab consists of four subtabs; General, Sales, Resources, and Leads. With the Oracle Sales Administrator role, you have access to these tabs to edit information that influences the way the application works.

For details about Marketing setups, please refer to the *Oracle Marketing Implementation Guide.*

14.2 General Administration

General administration includes the Globalization section. See the following topics for information on setting up these functions.

- Section 14.2.1, "Globalization"

14.2.1 Globalization

You can manage the following items from the Globalization section:

- Section 14.2.2, "Calendar Type"
- Section 14.2.3, "Accounting Calendar"
- Section 14.2.4, "Type Mapping"
- Section 14.2.6, "Period Rate"
- Section 14.2.7, "GL Daily Rate"
- Section 14.2.8, "Transaction Calendar"

14.2.2 Calendar Type

Navigation

Administration > General > Globalization > Calendar Type

Steps

1. To search for calendar types:
   a. Select a Year Type from the drop down list.
   b. Enter a Period Type.
   c. Click **Search**.
2. To create a new calendar type:
   a. In the first blank Period Type field, enter the period type you want to create. This is a required field.
   b. Enter the number of Periods Per Year (between 1 and 366 days). This is a required field.
   c. Select a Year Type from the drop down list. This is a required field.
   d. Optionally, enter a Description.
3. Click **Update**.

14.2.3 Accounting Calendar

Navigation

Administration > General > Globalization > Accounting Calendar

14.2.3.1 Search for an Existing Accounting Calendar

Steps

To search for an existing Accounting Calendar:

1. Select a Calendar from the drop down list. This is a required field.
2. Enter a Period Name.
3. Enter a Start Date.
4. Enter an End Date.
5. Click **Search**.

14.2.3.2 Create a New Accounting Calendar

A calendar for a new year should contain the period, quarter, and year, and there should be no missing days between periods.

To create a new accounting calendar:

1. Either click the **Create** button or in the first blank Prefix field, enter a prefix for the accounting calendar you want to create. This is a required field.
2. Select a Type from the drop down list. This is a required field.
3. Enter a Year. This is a required field.
4. Enter a Quarter. This is a required field.
5. Enter a Number. This is a required field.
6. Select a From and To Date by clicking the Calendar icon. These are required fields.
7. Enter an calendar name.
8. Click **Create** from the create accounting calendar page OR if you created the calendar on the summary page, click **Update**.

Note: The number is validated against Periods Per Year for the period type defined in Calendar Type.

14.2.4 Type Mapping

Navigation

Administration > General > Globalization > Type Mapping

Steps

1. Set the profile option "OS: Forecast Calendar" with a calendar name.
2. Select the calendar defined in the previous profile option "OS: Forecast Calendar".

14.2.5 Create a New Type Mapping

To create a new type mapping:

1. In the first blank Period Type field, select a period type from which you want to set the conversion rates from the drop down list. This is a required field. Make sure that the calendar you are using is the forecast calendar.
2. Select the Conversion Type from the drop down list. This is a required field.
3. Enter a Description.

   e. Select the **Updatable** and **Deletable** checkboxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).

14.2.6 Period Rate

The currencies used for this application must be set up with the conversion rates for each period. The exchange rate should be entered for the smallest period type used by your company, i.e., day, week, month. Enter the exchange rate value for each of the currencies needed.

The Period Rate and GL Daily Rate screen is used to enter and display the conversion rates for a specific period or for specific currencies.

Navigation

Administration > General > Globalization > Period Rate

Steps

The Pseudo Period Rates page opens.

1. To search for Pseudo Period Rates:
   a. Select a Calendar from the drop down list.
   b. Enter the full or partial name of the Period Name, using % as a wildcard, click **Go**.
   c. Select a Start or End Date under the Mapping Date.
   d. Click **Search**.
2. To create a new period rate:
   a. On the first blank Period Name line, enter a full or partial period name, using % as a wildcard. Click Go. This is a required field.
   b. Select the currency you want to convert From from the drop down list. This is a required field.
   c. Select the currency you want to convert To from the drop down list. This is a required field.
   d. Conversion Type is automatically populated from Period Name list of values in a previous step.
   e. Enter the rate in the Rate field.
   f. The **Updatable** and **Deletable** checkboxes display if the pseudo period rates can be changed. If you need to change the status of these checkboxes, click the Type Mapping link.
3. Click **Update**.

14.2.7 GL Daily Rate

The currencies used for this application must be set up with the conversion rates for each period. The exchange rate should be entered for the smallest period type used by your company, i.e., day, week, month. Enter the exchange rate value for each of the currencies needed.

The Period Rate and GL Daily Rate screen is used to enter and display the conversion rates for a specific period or for specific currencies.

Navigation

Administration > General > Globalization > GL Daily Rate

Steps

The GL Daily Rate page opens.

1. To search for a GL Daily Rate:
   a. Select a From Currency from the drop down list.
   b. Select a To Currency from the drop down list.
   c. Select a Conversion Date by clicking the Calendar icon.
   d. Select a Conversion Type from the drop down list.
   e. Click **Search**.
2. To create a new daily rate:
   a. Select the first blank From Currency field and choose the currency you are converting from the drop down list. This is a required field.
   b. In the To Currency field, select the currency you want to convert to from the drop down list. This is a required field.
   c. Click the Calendar icon to select a Conversion Date. This is a required field.
   d. Select a Conversion Type from the drop down list. This is a required field.
   e. Enter the Conversion Rate in the field provided. This is a required field. The Inverse Conversion Rate is calculated and provided automatically.

      If the profile "Daily Rates Window: Enforce Inverse Relationship During Entry" is set to Yes, the application ensures that the conversion rate and the inverse conversion rate always have an inverse relationship. If either rate is changed, the application automatically recalculates the other as the inverse of the changed rate. If the profile option is set to No, then the application will not enforce the inverse relationship. You can change either of the rates independently.
   f. Click the Enter by Date Range button which allows you to enter conversions for a date range.
3. Click **Update**.

14.2.8 Transaction Calendar

Use the following steps to set up the transaction calendar.

Navigation

Administration > General > Globalization > Transaction Calendar

14.2.8.1 Find an Existing Transaction Calendar

Use the name or description of the calendar in the appropriate field. Click **Go**.

14.2.8.2 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**.

14.2.8.3 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**.

14.3 Sales Administration

Sales administration includes the topics related to sales functionality.

- Section 14.3.1, "Menu Administration"
- Section 14.3.6, "Home Page"
- Section 14.3.10, "Sales Category"

- Section 14.3.15, "Call Center"
- Section 14.3.16, "Opportunity"
- Section 14.3.21, "Forecast"
- Section 14.3.25, "Accesses"

14.3.1 Menu Administration

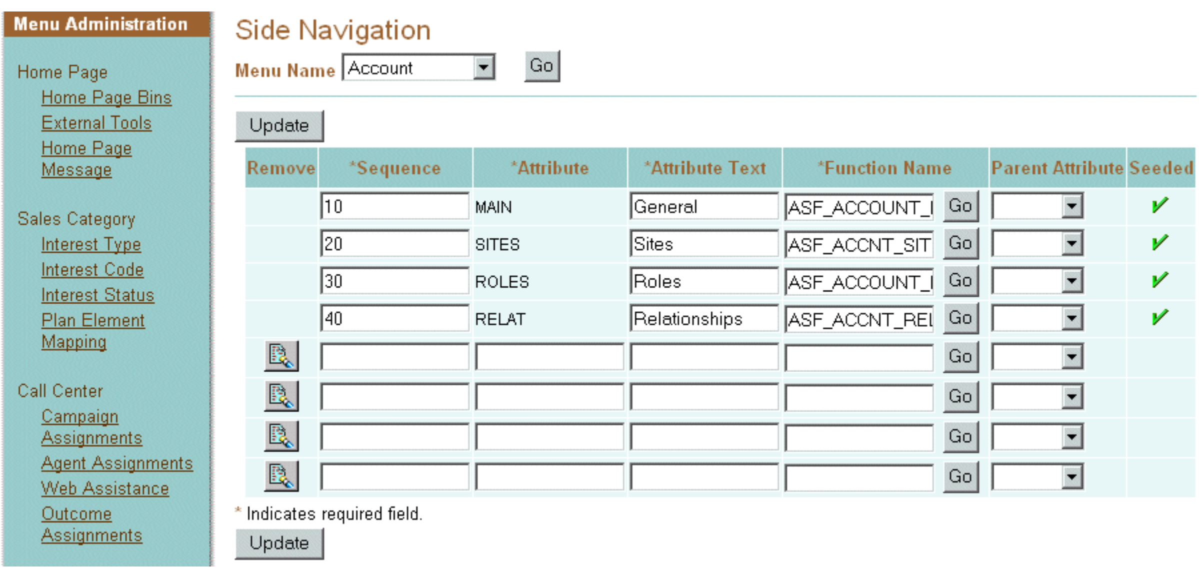
The Menu Administration page is used to organize the side panel navigation menus for Oracle Sales Online. By re-sequencing menus, creating parent/child menus, and re-naming menus, you can organize the side panel navigation to your preferences.

- Section 14.3.2, "Resequence Side Panel Navigation Menus"
- Section 14.3.3, "Change the Menu Name"
- Section 14.3.4, "Create a Parent Menu"
- Section 14.3.5, "Create Your Own Menu"

Navigation

Administration > Sales > Menu Administration

The Side Navigation page opens.



14.3.2 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. In the Sequence field enter the number that represents the sequence in which you want that menu to be displayed. For example, if you want Account menu to display first, you may enter the sequence number as 10. In this example, if you wanted to add a menu before or after the Account menu, you would enter a menu with the number 5 or 15.
4. Click **Update**.

14.3.3 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**.

14.3.4 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**.

14.3.5 Create Your Own Menu

Steps

1. On the first blank line of the Menu Administration 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**.

14.3.6 Home Page

Use these tools to manage home page information:

- Section 14.3.7, "Setting Up Home Page Bins Accessibility"
- Section 14.3.8, "External Tools"
- Section 14.3.9, "Home Page Message"

14.3.7 Setting Up Home Page Bins Accessibility

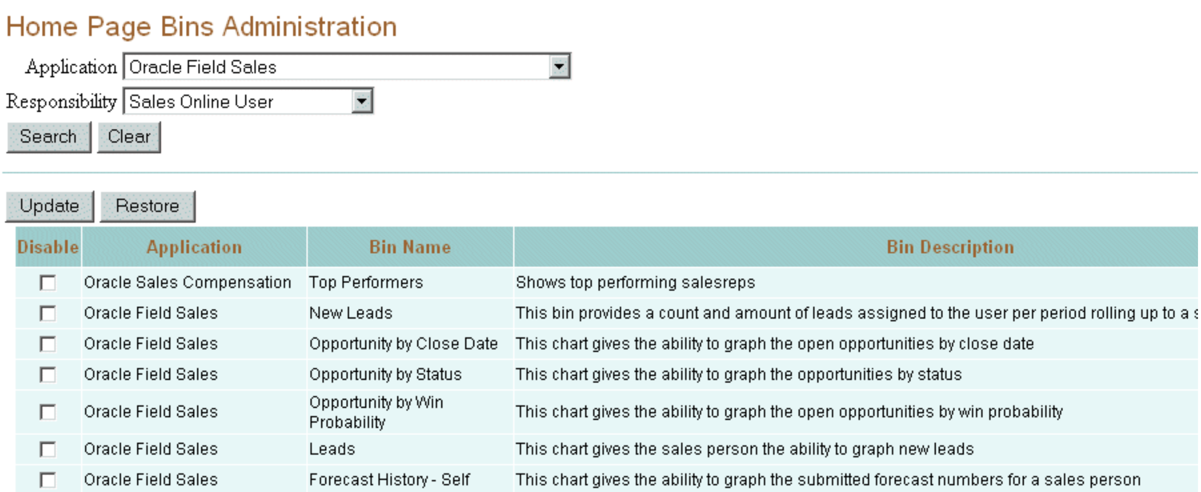
The home page displays selected bins, or snaphots, of information within Oracle Sales Online. You can manage which responsibility has access to which bins through the Home Page Bins link from the Administration tab.

Navigation

Administration > Sales > Home Page > Home Page Bins

Steps

1. The Home Page Bins Administration page opens.
2. Select the Application from the drop down list. Oracle Sales Online is listed as Oracle Field Sales.
3. Select the Responsibility for which you want to give bin access from the drop down list.
4. Click **Search**.
5. Restrict access to the bin by selecting the Disable checkbox. Giving access to a bin means that you did not select the Disable checkbox.


Home Page Bins Administration

Application: Oracle Field Sales

Responsibility: Sales Online User

Search Clear

Update Restore

Disable	Application	Bin Name	Bin Description
☐	Oracle Sales Compensation	Top Performers	Shows top performing salesreps
☐	Oracle Field Sales	New Leads	This bin provides a count and amount of leads assigned to the user per period rolling up to a s
☐	Oracle Field Sales	Opportunity by Close Date	This chart gives the ability to graph the open opportunities by close date
☐	Oracle Field Sales	Opportunity by Status	This chart gives the ability to graph the opportunities by status
☐	Oracle Field Sales	Opportunity by Win Probability	This chart gives the ability to graph the open opportunities by win probability
☐	Oracle Field Sales	Leads	This chart gives the sales person the ability to graph new leads
☐	Oracle Field Sales	Forecast History - Self	This chart gives the ability to graph the submitted forecast numbers for a sales person

6. Click **Update**.

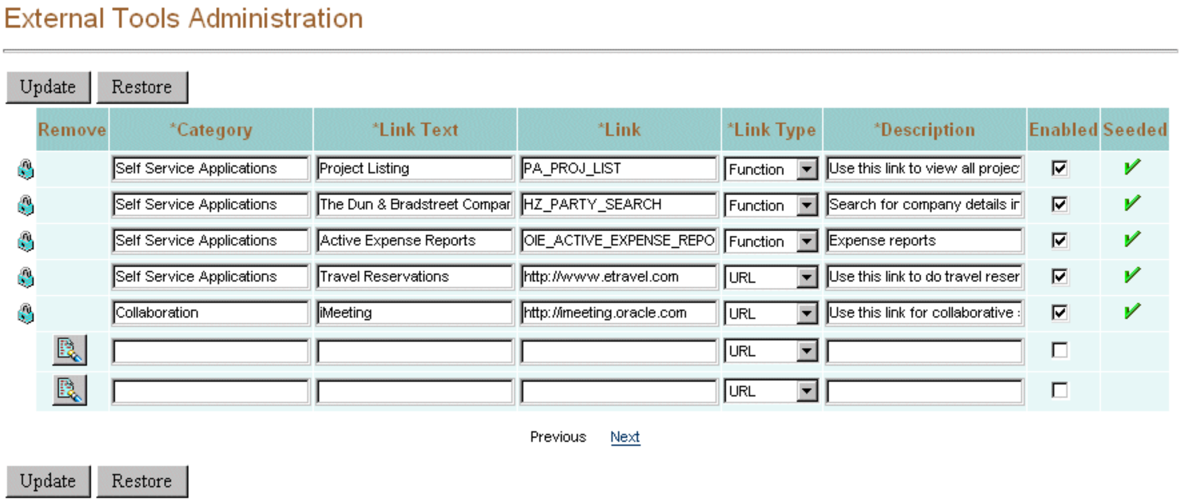
14.3.8 External Tools

Oracle Sales Online has the ability to provide links to external sites (HTML and jsp only) as well as ERP applications. You may only call self-service functions or functions which call HTML or jsp pages.

14.3.8.1 Setting Up Links to External Sites

Navigation

Administration > Sales > Home Page > External Tools



Steps

1. Enter the following required fields:
   - Category
   - Link text: This text will show on the page.
   - Link type (e.g., for a URL, http://www.oracle.com)
   - Description
2. Set the Link Type to URL from the drop down list.
3. Select the Enabled checkbox.
4. Click **Update**.

14.3.8.2 Setting Up Links to ERP Applications

Navigation

Administration > Sales > Home Page > External Tools

Steps

1. Enter the following required fields:
   - Category

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

2. Choose Function in the Link Type drop down list.
3. Select the Enabled checkbox.
4. Click **Update**.

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 server after making any changes to the tools administration.

14.3.9 Home Page Message

Create or edit the message that is displayed in the upper right section of the home page. This message can be customized using HTML tags.

Navigation

Administration > Sales > Home Page > Home Page Message

Steps

1. Enter a new message in the text box.

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

14.3.10 Sales Category

Use the following information to manage the sales category section:

- Section 14.3.11, "Interest Types"
- Section 14.3.12, "Interest Codes"
- Section 14.3.13, "Interest Status"
- Section 14.3.14, "Plan Element Mapping"

14.3.11 Interest Types

Interest Types can be used to classify your customers (organizations and people), opportunities, and purchases in a number of ways. An interest type can represent any classification of products.

The Interest Type classification has three layers:

- Interest Type
    - Primary Interest Type
        - Secondary Interest Code

Use the following procedure to define Interest Types.

Navigation

Administration > Sales > Sales Category > Interest Types

- Search for an Interest Type
- Create a New Interest Type

14.3.11.1 Search for an Interest Type

Steps

1. Select a Type from the drop down list.
2. Enter a Description.
3. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead / Opportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).
4. Click **Search**.

14.3.11.2 Create a New Interest Type

Steps

1. Select the first blank Type field and enter the name of the new interest type. This is a required field.
2. Optionally, enter a description.

3. Select all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead / Opportunity Classification, Expected Purchase, Globally Enabled).

   Note: Oracle Sales Online does **not** use interest types to classify customers. Oracle Sales Online uses the Trading Community Architecture (TCA) Customer Classification lookup.

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

   You can create an interest type without enabling it at either the global or organization level, however, this interest type will not be available for use. The intent is to be able to create interest types that can be enabled at a later time.

5. Click **Update**.

   Note: You cannot delete interest types because an interest type may be related to transaction records.

14.3.12 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, and printers. You might then use the secondary codes for product families such as, desktops, laptops, modems, and ink-jet printers.

Use the following procedure to modify and create Interest Codes.

Navigation

Administration > Sales > Sales Category > Interest Code

- Search for an Interest Code
- Create a New Interest Code

14.3.12.1 Search for an Interest Code

Steps

1. Select an Interest Type from the drop down list.

2. Click **Search**.

14.3.12.2 Create a New Interest Code

Steps

1. Enter the interest code for the Interest Type you want to set up. This is a required field.
2. Enter a description.
3. Select the Enabled checkbox, if applicable.
4. Click **Update**.

14.3.13 Interest Status

Navigation

Administration > Sales > Sales Category > Interest Status

14.3.13.1 Search for an Interest Status

Steps

1. Select a **Type** from the drop down list.
2. Enter a **Description**.
3. Check all applicable checkboxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead / Opportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).
4. Click **Search**.

14.3.14 Plan Element Mapping

In order for sales personnel to be able to estimate their commissions based on their submitted product category worksheet forecasts, interest types and codes must be mapped to Plan Elements in Oracle Sales Compensation.

One Plan Element can be mapped to one or more interest type / primary interest code / secondary interest code.

Plan element mapping is required for using Income Planner.

Navigation

Administration > Sales > Sales Category > Plan Element Mapping

- Search for a Plan Element Mapping
- Create a New Plan Element Mapping

14.3.14.1 Search for a Plan Element Mapping

Steps

1. Enter the plan element.
2. Select the mapping type from the drop down list.
3. Click **Search**.

14.3.14.2 Create a New Plan Element Mapping

Steps

1. Select the first blank Plan Element field and select the plan element you want to map from the drop down list. This is a required field.
2. From the second column, select the Mapping Type from the drop down list. This is a required field.
   * Map quota to primary interest code - if you want to map the plan element to a primary code.
   * Map quota to secondary interest code - if you want to map the plan element to a secondary code.
   * Map quota to interests type - if you want to map the plan element to an interest type.
3. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.
4. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using % as a wildcard, and click Go.
5. Click **Update**.

14.3.15 Call Center

The Call Center is used for Oracle TeleSales. For more information on Oracle TeleSales, please refer to the *Oracle TeleSales Implementation Guide* and *Oracle TeleSales User Guide*.

Some of the available functions are:

- Campaign Assignments
- Agent Assignments
- Web Assistance

14.3.16 Opportunity

In this section values are defined for the opportunity win probabilities, sales stages, status, and sales methodologies. The active values are displayed in the corresponding fields on the opportunity detail screen.

The Win Probability setup screen include the probability percentage, meaning, effective dates and an active flag.

The Sales Stage setup screen shows the sales stage name, description, the range of win probabilities for the sales stage, effective dates and an active flag. Depending on a profile option, the application can require the win probability to be within the range defined for the sales stage.

The Opportunity Status screens display a summary list of the status codes, meaning and description, along with a detail screen where you select attributes for the status.

The Sales Methodology screen defines the sales stages to be included in the methodology, the sequence of the sales stages, the win probability range and the task template to use. The win probability range within a methodology overrides the range for an independent sales stage.

See Also

- Section 14.3.17, "Win Probability"
- Section 14.3.18, "Sales Stage"
- Section 14.3.19, "Status Code"
- Section 14.3.20, "Sales Methodology"

14.3.17 Win Probability

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

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

- Find and Modify a Win Probability
- Enter a New Probability

14.3.17.1 Find and Modify a Win Probability

Use the following procedure to define or modify Win Probabilities.

Navigation

Administration > Sales > Opportunity > Win Probability

Steps

1. Enter the win probability number in the Win Probability field.
2. Optionally, enter the Meaning.
3. Click **Search**.

14.3.17.2 Enter a New Probability

Use the following procedure to define or modify Win Probabilities.

Navigation

Administration > Sales > Opportunity > Win Probability

Steps

1. Click in a **Win Probability** field in a new row. This is a required field.
2. Enter a Value between 0 and 100.
3. Enter or change the information in the **Meaning** field.
4. Select a Start Date in the **From** field by clicking the Calendar icon. This is a required field.

5. Optionally, enter an End Date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
6. Click the "Enabled" checkbox to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user's interface.
7. Click **Update**.

14.3.18 Sales Stage

A set of pre-defined Sales Stages is included with this application. You may choose not to use the pre-defined set and create customized sales stages of your own. Or, you can use a combination of the pre-defined set with additional customized Sales Stages.

- Find an Existing Sales Stage
- Enter a New Sales Stage

14.3.18.1 Find an Existing Sales Stage

Use the following procedure to define or modify Sales Stages.

Navigation

Administration > Sales > Opportunity > Sales Stage

Steps

1. Enter the sales stage name in the Name field.
2. Optionally, enter a Description.
3. Click **Search**.

14.3.18.2 Enter a New Sales Stage

Use the following procedure to define or modify Sales Stages.

Navigation

Administration > Sales > Opportunity > Sales Stage

Steps

1. Click in a **Name** field in a new row. This is a required field.
2. Enter a description

3. Enter a minimum and a maximum win probability value for this stage in the **Min** and **Max** fields. These are required fields.
4. Select a start date in the **From** field by clicking the Calendar icon and choosing a date. This is a required field.
5. Optionally, select an end date for the **To** field. If an end date is selected, the Sales Stage will be disabled after that date.
6. Click the **Enabled** checkbox to enable the Sales Stage. If the **Enabled** box is not checked, the Sales Stage will not be enabled.
7. Click **Update**.

14.3.19 Status Code

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

14.3.19.1 Search for a Status Code

Use the following procedure to define Opportunity Status.

Navigation

Administration > Sales > Opportunity > Status Codes

Steps

1. Enter the Status Code.
2. Enter the Meaning
3. Enter the Description.
4. Click **Search**.

14.3.19.2 Create a New Status Code

Use the following procedure to define Opportunity Status.

Navigation

Administration > Sales > Opportunity > Status Codes

Steps

1. Click **Create**.
2. Enter a Status Code.
3. Enter a Meaning.
4. Enter a Description.
5. Select the "Enabled" checkbox to activate the opportunity status.
6. Select the "Open" checkbox to signify whether the opportunity is open or closed. If the checkbox is selected, it means that the opportunity is open. Conversely, if the checkbox is not selected, it means closed and requires a close reason to be entered.
7. Select the Include in Forecast checkbox to include the status in forecasts.
8. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate checkbox in the Used For region.
9. The Win Loss Indicator region indicates whether the deal has been won, lost, or neither. If the open flag is unchecked, then the choices are won or lost.
10. Click **Create**.
11. Click **Update**.

14.3.20 Sales Methodology

Every time a sales representative has a potential opportunity, the sales representative follows a series of steps before closing the sale. This process is referred to as a Sales Methodology and the specific steps are referred to as Sales Stages. Each sales stage creates a set of tasks, mandatory or optional, to be performed by the sales representative in accordance with the Sales Methodology selected. However, a sales rep is not required to select a sales methodology if they choose not to and once a sales methodology is selected for an opportunity it cannot be changed.

The following list is the default Units of Measure (UOM) codes that, if used, the workflow calculates the planned end date. If not used, the planned end date and planned start date are the same as the system date:

- DAY (day)
- WK (week)
- HR (hour)

- MIN (minute)
- MTH (month)
- CN (century)

If you use only these Unit of Measure codes, then you do not need to make any modifications. However, if you use any other Unit of Measure, then you must modify the CHECK_DURATION procedure in the workflow package AS_SALES_METH_WF to make sure that the start and end dates are correctly calculated. You can find this workflow package with the file name ASF/patch/115/sql/asxsmtws.pls (spec) and asxsmtwb.pls (body). Use the example in the file to make your change. If you do not make this modification, then the application does not calculate start and end dates. Instead, it creates a note informing the user of the problem.

Profiles that govern behavior when using Sales Methodologies are; OS: Create Tasks Flag which can be used to disable automatic creation of tasks throughout the sales methodology work flow, and OS: Sales Methodology that can be used to set the default sales methodology at the site, application, or user level.

Navigation

Administration > Sales > Opportunity > Sales Methodology

The Sales Methodology Summary page opens.

Steps

1. Click **Create**.

   The Sales Methodology Create page opens.
2. Enter a name for the sales methodology. This is a required field.
3. Enter a description. This is an optional field.
4. Select Effective From date by clicking the Calendar icon and choosing a date. This is a required field.
5. Select Effective To date by clicking the Calendar icon and choosing dates.
6. Enter the Sequence that with which you want the sales stage to follow. This is a required field.
7. Select a Sales Stage from the drop down list. This is a required field.
8. Optionally, select a Task Template Group from the drop down list.

9. Select a Minimum Win Probability from the drop down list. This is a required field.

10. Select a Maximum Win Probability from the drop down list. This is a required field.

11. Click **Create**.

Please note, if the sales methodology is being used by an opportunity, you can add new sales stages to the methodology but cannot modify the existing sales stages.

14.3.21 Forecast

Forecast categories and forecast category mapping work together to build the list of interest types used in building forecasts, opportunity worksheets, and product category worksheets. Each forecast category can have a different list of interest types mapped to the selected category. Interest codes cannot be used in mapping a forecast category.

- Section 14.3.22, "Forecast Category"
- Section 14.3.23, "Forecast Category Mapping"
- Section 14.3.24, "Budget/Revenue Entry"

14.3.22 Forecast Category

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

You can add or modify forecast category from the Administration tab.

- Section 14.3.22.1, "Modify an Existing Forecast Category"
- Section 14.3.22.2, "Add a Forecast Category"

14.3.22.1 Modify an Existing Forecast Category

Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

Steps

1. Modify information.

2. Click **Update**.

14.3.22.2 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**.

14.3.23 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.

14.3.23.1 Search for a Forecast Sales Category

Navigation

Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

Steps

1. Select a Forecast Category Name from the drop down list.
2. Click **Search**.

14.3.23.2 Create a New Sales Category Value

Navigation

Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

Steps

1. In the first blank Interest Type field, select an interest type from the drop down list. This is a required field.
2. Select a Start Date by clicking the Calendar icon. This is a required field.
3. Select an End Date by clicking the Calendar icon.
4. Click **Update**.

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

14.3.24 Budget/Revenue Entry

The Budget/Revenue set up is used to govern the Forecast reports, to compare forecast and pipeline amounts to the allocated budget and actual revenue amounts. You can enter data or load data from a file.

Please note, salesperson number refers to resource number.

14.3.24.1 Search for an Existing Budget and Revenue Entry

Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.

14.3.24.2 Enter New Budget and Revenue Amounts

Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.
6. Enter the budget amount.
7. Enter actual revenue amount.
8. Select a currency from the drop down list. This is a required field if amount is entered.
9. Click **Update**.
10. Click the **Sales Group Name** link to view details and enter data for the next level of subordinates.

14.3.24.3 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.

14.3.25 Accesses

- Section 14.3.26, "Territory"
- Section 14.3.27, "Resource"
- Section 14.3.28, "Customer"
- Section 14.3.29, "Lead"
- Section 14.3.30, "Opportunity"

14.3.26 Territory

Navigation

Administration > Sales > Accesses > Territory

Steps

1. Enter the territory for which you are searching. This is a required field.
2. Choose to display the Customer, Opportunities, or Leads by selecting the checkbox.
3. Click **Go**.

14.3.27 Resource

Navigation

Administration > Sales > Accesses > Resource

Steps

1. Enter the resource for which you are searching. This is a required field.
2. Choose to display the Customer, Opportunities, or Leads by selecting the checkbox.
3. Click **Go**.

14.3.28 Customer

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

Navigation

Administration > Sales > Accesses > Customer

Steps

1. Enter the full or partial customer/address, using % as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the customer are displayed.

14.3.29 Lead

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

Navigation

Administration > Sales > Accesses > Lead

Steps

1. Enter the full or partial lead name, using % as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the lead are displayed.

14.3.30 Opportunity

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

Navigation

Administration > Sales > Accesses > Opportunity

Steps

1. Enter the full or partial opportunity name, using % as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the opportunity are displayed.

14.4 Leads Administration

The Administration tab allows a system administrator to set up items that govern the way leads are handled in this application.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for information.

14.5 Resource Administration

The Administration tab allows a system administrator to set up items that govern the way resources such as, employees, groups, and roles are handled.

Refer to the *Oracle CRM Application Foundation Implementation Guide* for information.

14.6 Adding a Custom Report to Report Listings

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.

14.7 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 11*i*.

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 11*i* 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.

14.7.0.1 To exclude tabs in this application

Steps

1. Create a new menu.
2. Identify menus corresponding to the tabs or subtabs that you wish to exclude.
3. Save your work.

14.7.0.2 To prevent users from accessing specific functions in this application

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.

14.7.0.3 To find function names

Steps

These instruction 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 adminstrator 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 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.

14.8 Turning "On" or "Off" Debug Information

This feature is available to those providing application support. This section covers information that can provide useful debug information.

Responsibility

System Adminstrator

Navigation

Login to Oracle Sales Online

Steps

1. Type `asfDiagPageMain.jsp` in the web browser address window to navigate to the required page.

   The current setting for the profile "ASF_PROFILE_DEBUG_MSG_ON" is displayed at the top of the page.

2. The debug information can be set at the "User" level for the current user, or at the "Site" level. Select the "Enable Debug" checkboxes for the level(s) at which you want to turn on the debug information.

3. Click the **Submit** button.

   To find the version of a Java class:

   - Type the full Java class name, with package information, in ClassName box.

- Click the **Get RCS ID** button.

4. After you turn on the profile, you must log out and then log in again before the profile changes will take effect. The same rule applies when you turn the profile off.

   Once the profile is turned on and you have completed the previous step, debug messages are displayed at the bottom of most pages.

   To turn off the debug feature, un-select the "Enable Debug" checkbox.

Notes

- Turning on the profile may have an impact on the performance of the application. For this reason, it should be used only in specific situations as determined by your business needs.
- This page is not translated because it is not intended for end-users.

14.9 Updating Job Title Type and Department Type LOV

The following section includes instruction on how to update Job Title Type LOV and Department Type LOV that are located on the create contact page.

Responsibility

System Adminstrator

Navigation

Oracle Sales Setup > Lookup Codes > Receivables

Steps

- Query Type = RESPONSIBILTY and add or disable the responsibility types needed.
- Query Type = DEPARTMENT_TYPE and add or disable the responsibility types needed.

Save your changes.

15

Mobile Tab

Sections in this chapter include:

- Section 15.1, "Overview of the Mobile Tab"

15.1 Overview of the Mobile Tab

Please refer to the *Oracle Field Sales/Laptop Concepts and Procedures* guide and the *Oracle Field Sales/Palm Concepts and Procedures* guide for information on using mobile products.

Part III

Appendixes

This part contains the following Appendixes:

- Appendix A, "System Profile Options"
- Appendix B, "Oracle Sales Online Wireless"
- Appendix C, "Oracle Sales Online Frequently Asked Questions"
- Appendix D, "Oracle Sales Online Seed Data"

A

System Profile Options

This appendix provides a table of all of the system profile options used by the Oracle Sales Family of eBusiness Suite applications. Each system profile option in this table is also described in the implementation step where it is set. This table compiles all system profile options and arranges them in alphabetical order by name.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)
- 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.

Responsibility

Sales Administrator

Navigation

Oracle Sales Setup > System Profiles

Steps

1. 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.		
obso lete	obso lete	ASL: Conflict Flag	Field Sales/Lap top	Conflict resolution	If 'Y', it means client wins, if 'N', it means server wins.		
obso lete	obso lete	ASL: Default MTL Organization ID for Field Sales/Laptop	Field Sales/Lap top				

Req.	New	Profile Name	Product	Functions	Description	Level	Default
obso lete	obso lete	ASL: Enable Attachment	Field Sales/Lap top	Attachme nts	Must be set to Yes for Oracle Field Sales/Laptop attachments to work.		
obso lete	obso lete	ASL: Enable Configurator	Field Sales/Lap top				
obso lete	obso lete	ASL: Enable Encyclopedia	Field Sales/Lap top	Marketing Encyclope dia			
obso lete	obso lete	ASL: Enable Selective Download	Field Sales/Lap top				
		AMS: Default Collateral Order Type	TeleSales	Collateral	This profile option defaults the order type that was set up in Order Management or collateral fulfillment.	ASRU	
		ASO: Automatic Numbering	TeleSales				
		ASO: Default Order Category	OSO TeleSales	Collateral, events	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.		Order Capture
		ASO: Default Order Type	TeleSales	Opportuni ties, 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.	SU	
		Default Login Function	Sales Online		Default login function		Null
		Default Status	TeleSales	Leads, opportunit ies	Default status for new tasks. Setting: all levels.		New

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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
		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.		
	11.5.9	IEU: Desktop: UI: Show Work Panel	TeleSales	Universal Work Queue	The work panel consists of an action panel where the user can take action on selected records and an information panel where notes are displayed for a selected record. If set to Yes, then the work panel appears for lead, opportunity, and marketing list nodes. If set to No, then the work panel does not appear.	ASRU	No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.9	IEU: Desktop: UI: Work-Selector Display Style	TeleSales	Universal Work Queue	This option determines how your work nodes are displayed. Hgrid: displays nodes in the left panel in an Hgrid view. Cascade: displays nodes in a cascading menu on top of the page.	ASRU	Hgrid
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 allow the user to work on leads that belong to him as the owner. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.		
		IEU: Queue: Marketing Lists	TeleSales	Universal Work Queue	Set to Yes to allow the user to work on non-media marketing lists within his sales territory. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.		
		IEU: Queue: My Team Leads	TeleSales	Universal Work Queue	Set to Yes to allow the user to work on leads that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.	ASRU	
		IEU: Queue: My Team Opportunities	TeleSales	Universal Work Queue	Set to Yes to allow the user to work on opportunities that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.	ASRU	
		IEU: Queue: Opportunities	TeleSales	Universal Work Queue	Set to Yes to allow the user to work on opportunities that belong to him as the owner. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.	ASRU	
		IEU: Queue: Quotes	TeleSales	Universal Work Queue	Set to Yes to make this category available.	ASRU	
		IEU: Queue Order: Leads	TeleSales	Universal Work Queue	Enter a number that designates the order of appearance for owned leads in the work queue (in relation to the other Queue Order profiles.)	ASRU	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		IEU: Queue Order: Marketing Lists	TeleSales	Universal Work Queue	Enter a number that designates the order of appearance for marketing lists in the work queue (in relation to the other Queue Order profiles.)		
		IEU: Queue Order: My Team Leads	TeleSales	Universal Work Queue	Enter a number that designates the order of appearance for my team leads in the work queue (in relation to the other Queue Order profiles.)	ASRU	
		IEU: Queue Order: My Team Opportunities	TeleSales	Universal Work Queue	Enter a number that designates the order of appearance for my team opportunities in the work queue (in relation to the other Queue Order profiles.)	ASRU	
		IEU: Queue Order: Opportunities	TeleSales	Universal Work Queue	Enter a number that designates the order of appearance for owned opportunities in the work queue (in relation to the other Queue Order profiles.)	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, opportunit ies	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 TeleSales	Quotes			

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		Notes: Default Note Status	Sales Online TeleSales			ASRU	
		OS: Address Required for Opportunity	Sales Online TeleSales	Opportuni ty	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
		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	Forecastin g	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	Opportuni ties	Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze checkbox selected. This profile can be set at either the responsibility or the user level. When set to *Y*, this profile option allows the user or responsibility to make changes. An *N* setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze checkbox is selected. This includes the Freeze checkbox 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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Assign New Lead	TeleSales Sales Online	Lead	If set to No, then the application uses the Territory Manager to automatically assign the resources to the lead. The first person the Territory Manager assigns becomes the owner. The rest of the resources in the territory become sales team members on the lead. If set to Yes, then the agent must enter the owner manually using the Owner drop-down list. If the agent does not make an entry, then the lead is assigned to the default user set in OS: Default Resource ID. If no default resource is set, then application assigns ownership to the user creating or updating the lead.		No
		OS: Auto Assigning from Lead Import	Sales Online TeleSales	Lead			Yes
		OS: Auto Convert Lead to Opportunity	Sales Online TeleSales	Lead			Yes
		OS: Auto Qualify Lead	TeleSales Sales Online	Lead	Turns automatic qualification for sales leads on or off. A setting of Yes, causes the application to attempt to qualify a lead each time the lead is updated. A setting of No means the user must qualify the lead manually by selecting the Qualified checkbox. If this profile is not set, it is defaulted to 'N'		Yes
		OS: Auto Ranking from Lead Import	Sales Online	Lead			Yes
		OS: Auto Run Lead Engines While Update	Sales Online	Lead			Yes
n/a	n/a	OS: Auto-relate Lead note to Customer	Sales Online TeleSales		Relate a newly created lead note to its party automatically. AS_NOTES_ LEAD_CUSTOMER		Yes
n/a	n/a	OS: Auto-relate Lead note to Primary Contact	Sales Online TeleSales		Relate a newly created lead note to its primary contact automatically. AS_NOTES_LEAD_CONTACT		No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Auto-relate Opportunity note to Customer	Sales Online TeleSales		Relate a newly created opportunity note to its party automatically. AS_NOTES_OPP_CUSTOMER	ASRU	Yes
		OS: Auto-relate Opportunity note to Primary Contact	Sales Online TeleSales		Relate a newly created opportunity note to its primary contact automatically. AS_NOTES_OPP_CONTACT	ASRU	No
		OS: Auto-relate Relationship note to Object	Sales Online TeleSales		Relate a newly created relationship note to its object automatically. AS_NOTES_REL_OBJECT	ASRU	Yes
		OS: Auto-relate Relationship note to Subject	Sales Online		Relate a newly created relationship note to its subject automatically. AS_NOTES_REL_SUBJECT	ASRU	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
	11.5.9	OS: Copy Opportunity Default Prefix	TeleSales	Opportunity Center	When a user copies an opportunity in the TeleSales Opportunity Center, the new name defaults to this profile value followed by the name of the original opportunity.	A	Copy of

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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
		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, organizati ons, persons, lookups	**Full:** The user can view and update all customers. Generally, this access is given to super users only. **Prospecting:** Users can view all customers but can update customer information only if they are on the sales team. **Sales Team:** Users can view and modify customer information when they are on the sales team.		Full
		OS: Customer Sales Team Default Role Type	TeleSales Sales Online	Organizati ons, Persons	Assigns a role type to a new sales team member if no role is specified by the user.		Accoun t Manage r
		OS: Daily Conversion Type	TeleSales Sales Online	Opportuni ties	Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types.		Corpora te
		OS: Date Mapping Type	Sales Online		Date mapping type		S
		OS: Dead Lead Status	Sales Online TeleSales	Leads	Dead lead status		DEAD_ LEAD

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Decision Time Frame Required	TeleSales Sales Online		Decision time frame required		Yes
		OS: Default Address Style	Sales Online		Default address style		AS_ DEFAU LT
		OS: Default Budget Status for Leads	Sales Online TeleSales	Leads	Default budget status for leads		Pendin g
		OS: Default Channel for Lead Selection Engine	Sales Online TeleSales	Leads	Default channel for leads		Direct
		OS: Default Close Date Days	TeleSales Sales Online	Opportuni ties	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 manageme nt	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 Marketing Owner	Sales Online TeleSales	Leads			
		OS: Default Lead Scorecard	TeleSales Sales Online	Leads	Default Lead Scorecard		
Yes		OS: Default Opportunity Sales Stage	TeleSales Sales Online	Opportuni ties	Default Sales Stage for new opportunity		Stage 1
		OS: Default Opportunity Status	TeleSales Sales Online	Opportuni ties	Default Opportunity Status for opportunity		Prelimi nary
Yes		OS: Default Opportunity Win Probability	TeleSales Sales Online	Opportuni ties	The default win probability for new opportunities.		10-Pros pecting (qualifie d)

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Default Owner for Referral Lead	Sales Online TeleSales	Lead			
		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 Primary organization address for new relationships	TeleSales Sales Online		When this profile is set to "Yes", the primary address of the org will automatically default as the relationship primary address when a new org-person relationship is created.	AS	No
		OS: Default Rating for Lead Rating Engine	Sales Online TeleSales	Leads			Cold lead
		OS: Default Resource ID Used for Sales Lead Assignment	TeleSales Sales Online	Leads	Sets up default resource to receive any imported leads not assigned by the territory management module.		
		OS: Default Sales Channel	TeleSales Sales Online	Opportuni ties	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	Opportuni ties	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	Opportuni ties	Defaulting primary customer address to opportunity.		No
		OS: Degree of Parallelism	Sales Online		Degree of Parallelism for concurrent program		4

Req.	New	Profile Name	Product	Functions	Description	Level	Default
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
		OS: Enable Real Time Lead Assignment	Sales Online TeleSales	Leads			Yes
		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
	11.5.9	OS: Enable Tracking Opportunity History Data	TeleSales Sales Online	Opportunity	Set at the site level. If set to Yes, will enable the history tracking of updates made to opportunity header information. If set to No (the default), will not track header updates for opportunity.	ASRU	No
	11.5.9	OS: Enable Tracking Purchase Line History Data	TeleSales Sales Online	Opportunity	Set to Yes to record when the line information or an opportunity is updated. Information does not yet display in Opportunity History.	ASRU	No
	11.5.9	OS: Enable Tracking Sales Credits History Data	TeleSales Sales Online	Opportunity	Set to Yes to record when the sales credit information or an opportunity is updated. Information does not yet display in Opportunity History.	ASRU	No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Execute TCA API Callouts for Mobile Sales	Sales Online		If set to "Yes" will not be able to create opportunity with primary contact and notes.		No
		OS: Execute TCA User Hooks for IBU	Sales Online		If set to "Yes" will not be able to create opportunity with primary contact and notes.		No
Yes		OS: Forecast Calendar	TeleSales Sales Online	Forecastin g	The name of the calendar you are using to manage your forecasts.		
Yes		OS: Forecast Sales Credit Type	TeleSales Sales Online	Forecastin g			
		OS: Generate Opportunity System Notes	TeleSales Sales Online	Opportuni ties	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.		
		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	Opportuni ties	When set to *Yes*, this system profile uses product categories from inventory for the interest types.		Yes
		OS: Language	TeleSales				
		OS: Lead Assignment User Hook	Sales Online TeleSales	Leads			No
		OS: Lead Incubation Channel	Sales Online TeleSales				

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 New State Transition	Sales Online TeleSales	Leads			Yes
		OS: Lead Routing Status	Sales Online TeleSales	Leads	Lead Status after Routing		New (seeded value)
		OS: Lead to Opportunity Move Sales Team	Sales Online TeleSales	Leads			
		OS: Lead View scorecard data	Sales Online TeleSales	Leads			No
Yes	Yes	OS: Linking Opportunity to Lead	TeleSales	Opportunities	There are three settings for this profile: 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. Allowed-If selected, allows the user to create a link to a lead through the Leads link on the Opportunity detail page. Not allowed-If selected, does not allow users to create links to leads.		Allowed with Prompt

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Manager Update Access	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	This profile option sets the level of access for sales team members with the role of TeleSales Manager to update information for their subordinates in the sales organization. This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege. This profile has three possible settings **Update data**: Update. **Inherit data**: Inherit access privilege from subordinate. **View data**: View data only.		R
		OS: Maximum reroutes per lead	Sales Online TeleSales				3
		OS: Maximum Roll Days for Converting Amount	TeleSales Sales Online	Opportunities	Maximum roll days for converting currency amounts if no daily conversion rate exists.		
		OS: Move Opportunities	Sales Online	Opportunities	Move Opportunities		Open
		OS: Move Sales Leads	Sales Online	Leads	Move Sales Leads		Open

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Opportunity Access Privilege	TeleSales Sales Online	eBusiness Center, organizati ons, persons, lookup	**Global Full:** Users can view and update all opportunities whether they are on the sales team or not. Generally, this access is given to super users only. **Org Full** (Full by Organization)**:** Users can view and update all opportunities whether or not they are on the sales team. However, they are restricted to viewing and updating data for the HR organization they are assigned to in Oracle HRMS. **Prospecting:** Users can view all opportunities but they can make changes only when they are on the sales team. Users can create opportunities for a customer only when they are on that opportunity's sales team. **Sales Team:** Users can view opportunities only when they are on the sales team. When the opportunity creator selects the Full Access checkbox on the Sales Team tab for a team member, that team member can update the opportunity. Otherwise the record is view only.		Global Full
		OS: Opportunity Probability Link	TeleSales Sales Online	Opportuni ties	Determines whether a warning or error is given if the win probability amount does not fall within the sales stages probabilities.		Warnin g
		OS: Opportunity Rollup Override Flag	Sales Online TeleSales	Opportuni ties	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	Opportuni ties	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	Opportuni ty Sales Teams	Opportunity Sales Team Default Role Type		

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.		
		OS: Org to Org with No Party ID	Sales Online	Org Relationships	If this profile is set to "Yes" user can create organization to organization relationships even if the create_ party_ flag is set to "No".		No
		OS: Partners Enabled for Leads	Sales Online TeleSales				
		OS: Perform Address Validation	Sales Online		If the profile is set to "Yes", then the parameters set up in Oracle Accounts Receivables will validate the addresses.		
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 TeleSales	Opportunities	Privilege to change the opportunity owner.	U	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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Referral Status for Converting Lead	Sales Online TeleSales				Lead Accepte d
		OS: Referral Status for Linked Lead	Sales Online TeleSales				Lead Decline d
		OS: Referral Status for New Lead	Sales Online TeleSales				Lead Submitt ed
		OS: Regenerate Methodology Tasks	Sales Online	Opportuni ty	Regenerate tasks for sales methodologies that have the "Create Tasks for All Stages" flag set to "No" when the sales stage changes.	Site	No
N	Y	OS: Relationship Original System Reference URL	TeleSales	eBusiness Center: Relationsh ip 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.		
		OS: Run Lead Monitor Engine	Sales Online TeleSales				Yes
		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: **Update data**: The administrator can update the same data as the manager of the group. **Inherit data**: Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates. **View Data**: Administrators can only view the data created by the manager's subordinates.		R
		OS: Sales channel required	TeleSales Sales Online	Lead manageme nt	A setting of Y requires users to enter a sales channel for a lead before that lead can be qualified. Does not apply to opportunities.		Y

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Sales Lead Access Privilege	TeleSales Sales Online	eBusiness Center, organizati ons, persons	Controls the level of access to leads. The available settings are: **Full**: Employees can view and modify all leads, even those not assigned to them. **Sales Team**: Only the employee who has been assigned the lead can view and modify it. **Prospecting**: Employees can view all leads but cannot update any.		Full
		OS: Sales Lead Aging Abandon-Action	Sales Online TeleSales	Leads	Sales Lead Aging Abandon-Action		Abando n
		OS: Sales Lead Aging Days to Abandon	Sales Online TeleSales	Leads	Sales Lead Aging Days to Abandon		1
		OS: Sales Lead Aging No Action	Sales Online TeleSales	Leads	Sales Lead Aging No Action		1
		OS: Sales Lead Aging No Action-Action	Sales Online TeleSales	Leads	Sales Lead Aging No Action-Action		Abando n
		OS: Sales Lead Default Close Reason	Sales Online TeleSales	Leads			
		OS: Sales Methodology	TeleSales Sales Online	Opportuni ties	Sales methodology		1
		OS: Sales Team Creator Keep Flag	TeleSales Sales Online	Opportuni ties	Default keep flag for sales team creator.		Yes

Req.	New	Profile Name	Product	Functions	Description	Level	Default
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 sort_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. Also, if the value of this profile is not set, then TAP will not alter the database settings.		
		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 AS_CHANGED_ACCOUNTS 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
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
	11.5.9	OS: Time Frame for Opportunity Logs	TeleSales Sales Online	Opportunity	Limits the number update records recorded to one in the specified time frame for Opportunity History. Options are None (no restrictions), Year, Quarter, Month, Week, Day, Hour, and Min.	ASRU	None

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OS: Total budget amount required	TeleSales Sales Online	Lead manageme nt	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	Forecastin g	Determines whether or not to use materialized views to get pipeline data for forecast.		No
		OS: View Competitor Party Detail	Sales Online		View Competitor Party Detail		Yes
		OS: View Partner Party Detail	Sales Online		View Partner Party Detail		Yes
		OSO: Application Utility Class	Sales Online		Class name of AppUtility Class (e.g., oracle.apps.asf.util.OsoAppUtility)		
		OSO: Create a list with filter conditions	Sales Online	Contact list			
		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		MARK ET
		OSO: Default Country	Sales Online		Default Country		US
		OSO: Default Customer Category	Sales Online		Default Customer Category		CUSTO MER
		OSO: Default for Show Quick Task	Sales Online		Default for Show Quick Task		No
	Yes	OSO: Default Forecast Category	Sales Online	Forecastin g	Setting to determine the default forecast category used when forecasting.		1
		OSO: Default Forecast Currency	Sales Online	Forecastin g	Setting to determine the default forecast currency used for forecasting.		USD
		OSO: Default Forecast Period Type	Sales Online	Forecastin g	The Default Forecast Period Type		
		OSO: Default Forecast Worksheet Lines	Sales Online	Forecastin g	Setting to determine what values should be used for defaults in the forecast worksheets, zero or pipeline.		Pipeline

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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		EMPLO YER_ OF
		OSO: Default Person Phone Type	Sales Online		The Default Person Phone Type		GEN
		OSO: Default Person Relationship	Sales Online		The Default Person Relationship		EMPLO YEE_ 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.		
		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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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	Forecastin g	Setting to determine whether grand totals should be displayed for the opportunity worksheet		No
		OSO: Display Purchase Line Sub Total	Sales Online	Opportuni ty	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
		OSO: Display Subordinate Current Pipeline	Sales Online	Forecastin g	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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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	Forecastin g	Setting to determine which worksheets are automatically submitted with submitting a forecast.		None
		OSO: Forecast Calendar Month	Sales Online	Forecastin g	Setting to determine the number of calendar months you can move forward or backwards when viewing.		6
		OSO: Forecast Max Generate Months	Sales Online	Forecastin g	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
		OSO: Enable Instruction Text	Sales Online	General	If set to "On", instruction text will appear on applicable pages. If set to "Off", the instruction text will not be displayed.		Off
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
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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
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
		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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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. This specifically tells the application not to check any security on the detail page level. So, even if a user is setup to have no access on viewing any opportunity on summary page, the user can still view the details of any opportunity. This feature is provided to customers so that they can still see the detail of an opportunity from the report drill down.		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
n/a	n/a	(obsolete) OSO: Opportunity Worksheet Threshold Amount	Sales Online		(obsolete) 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: Org to Org with No Party ID	Sales Online		If set to Yes, displays organization to organization relationship details		
		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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OSO: Subordinate Current Pipeline	Sales Online		Display subordinate current pipeline		Yes
		OSO: Use Flexible Data Security	Sales Online	Security	If set to "Yes" will use the flexible security options.		No
		OSO: Use Product Category LOV	Sales Online	Opportuni ty	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	Opportuni ty	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: Associate Relationship Location To Organization	TeleSales	Addresses	When you create a location information for a relationship, if this profile is set to Yes the same location information is also linked to the Organization of the relationship. If set to No, this will not happen. We recommend you set this to No to minimize the number of addresses for the organization.	ASRU	Yes
	11.5. 9	OTS: At a Glance Dashboard HGrid Expanded Display	TeleSales	At a Glance	Determines whether the summary section hierarchy opens expanded (Yes) or collapsed (No)	ASRU	Yes
	11.5. 9	OTS: At a Glance Display Menu	TeleSales	At a Glance	Determines what objects appear in the At a Glance window. System Administrator can create menus and set this profile for different users. Select the menu name.	ASRU	OTS: At a Glance Display Menu
	11.5. 9	OTS: At a Glance - Enable Dashboard Data Refresh at form startup	TeleSales	At a Glance	If set to Yes, then runs the Customer Profile Engine concurrent program every time the At a Glance window is opened by any user. (The window opens more slowly when set to Yes.) If set to No, then you need to add the Customer Profile Engine concurrent program to the schedule.	S	No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.9	OTS: At a Glance - Execute User Callouts For Data Refresh	TeleSales	At a Glance	Set to Yes to use custom callouts for data refresh.	S	No
	11.5.9	OTS: At a Glance - Number of Months of Data to Show	TeleSales	At a Glance	You can set for 3 or 6 months. This controls the number of months of information the concurrent program OTS: At a Glance - Refresh Business Objects pulls. It also controls the time period for the notes displayed.	S	3
		OTS: Contact Role	TeleSales	Organizations, Persons	Sets the default contact role for an organizational contact. The contact created in the caller information section of eBusiness Center is assigned this role.	ASR	Contact
	11.5.8	OTS: Customer - Display Inactive Records For Party List Of Values	TeleSales	eBusiness Center	Set to Yes to display inactive as well as active customers in the Organization, First Name, and Last Name LOVs. Set to No to display only active records.	ASRU	No
	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	
	11.5.9	OTS: Default Collateral Printer Name	TeleSales	Collateral Tab of eBusiness Center	Sets the default printer in the Sent To field for the Shipping Method of Printer on the Collateral Tab	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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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	eBusiness, Lead, Opportunity Centers	Default type for a new note in the note tab in eBusiness Center, Lead Center, and Opportunity Center. (Note types are mapped to objects in the Note Type Mapping window.)	ASRU	AS_USER
		OTS: Default Party Type	TeleSales	Organizations, Persons	Sets the default party type for the caller information section of the eBusiness Center. 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
	11.5.9	OTS: Default Quote Form	TeleSales	At a Glance	Designates the window that opens when user drills down on a quote. Options are Quoting, Order Capture Navigator, and Order Workbench.	ASRU	Quote
		OTS: Default Relationship	TeleSales	Organizations, Persons	The default relationship between parties.	ASRU	CONTACT_OF
		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	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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	Opportuni ty Center	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	Universal Search	Default Universal Search Tab	ASRU	Quick Search
		OTS: Default Universal Search Type	TeleSales	Universal Search	Default Universal Search Type	ASRU	Organiz ation
		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	
	11.5. 8	OTS: Default User Group	TeleSales	Selection of Sales Group	Entering a default user 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. The profile option OTS: Default User Role must be set and you must exit and re-enter the System Profile Values window before setting the OTS: Default User Sales Group profile.	ASRU	
		OTS: Display Customer Profile	TeleSales	eBusiness Center	A setting of *Yes* enables the customer profile area of the eBusiness Center. A setting of *No* means the fields are disabled.	ASRU	No
		OTS: Dump UWQ Params	TeleSales	UWQ	Setting this profile will dump the parameters from UWQ to TeleSales into the log file.	ASRU	Yes
	11.5. 9	OTS: Display Interaction History in expanded mode	TeleSales	eBusiness Center, Overview tab	If set to No, then user must click the plus sign next to an interaction in order to view the activity.		No

Req.	New	Profile Name	Product	Functions	Description	Level	Default
n/a	n/a	(obsolete) OTS: Enable Address Validation	TeleSales	Organizations, Persons	(obsolete) A setting of *Yes* 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
	11.5.9	OTS: Enable Dialing from eBusiness Center	TeleSales	eBusiness Center	Yes enables dialing the soft phone by double-clicking the phone number. Oracle Advanced Inbound must be implemented.	ASRU	No
	11.5.8	OTS: Enable Email Center Integration	TeleSales	eBusiness, Opportunity, and Lead Centers	If set to Yes, 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 No, 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. This is for debug purpose only.	ASRU	No
	11.5.9	OTS: Enable Web Collaboration	TeleSales	iMeeting	Set to Yes to be able to start an iMeeting from the Action menu.	ASRU	No
		OTS: Generate Collateral Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of collateral activities such as sending out collateral.		No
		OTS: Generate Customer Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to customer records.		No
		OTS: Generate Event Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to events.		No
		OTS: Generate Lead Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to leads.		No
		OTS: Generate Opportunity Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to opportunities.		No
		OTS: Hang Up on End	TeleSales	Interaction	Hang up the telephone at the end of the interaction.	ASRU	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		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	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. 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.	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	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. 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).	ASRU	Mainte nance
		OTS Interactions-Enable Auto Wrap-Up	TeleSales	Interaction History	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 or The user closes the window where the interaction was started. 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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS Interactions-Enable Automatic Start	TeleSales	Interaction History	A Yes setting for this profile option enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting interactions manually. 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-Enable Change Activity	TeleSales	Interaction History	Set to Yes to allow allows user to change system recorded activities in the wrap-up window. 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.	ASR	No
		OTS: Interactions-Generate Collateral Activity	TeleSales	Interaction History	Yes: Tracks activities related to collateral. No: Disables interaction tracking for the creation of collateral orders. 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 Customer Activity	TeleSales	Interaction History	Yes: Tracks activities related to customer records. No: Disables tracking of activities related to customer records. 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

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

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.9	OTS: Interactions-Generate Query Activity	TeleSales	Interaction History	Yes: Records queries as activities if an interaction is started. The profile *OTS: Interactions-Start On Query* determines if an interaction starts upon query. If it is set to No, then an interaction must already be started before the query in order for the query to be recorded. No: Disables tracking of queries. 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
	11.5.9	OTS: Interactions - Generate Service Request Activity	TeleSales	Interaction History	Yes: Tracks activity for service requests. No: Does not track service request activity.	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
	11.5.9	OTS: Interactions - Maximum multiple interactions	TeleSales	Interaction Tracking	Controls the total number of simultaneous interactions that can be tracked	ASRU	1
	11.5.9	OTS: Interactions - Prompt for Wrapup	TeleSales	Interaction Tracking	Set to yes if you want users to be prompted to close the current interaction when they start another simultaneous interaction.	ASRU	Yes

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		OTS: Interactions-Record Media Item ID	TeleSales	Interaction History	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. 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.	ASRU	Yes
		OTS: Interactions-Start On Query	TeleSales	Interaction History	When interaction is enabled, setting this profile to Yes will start an interaction when a record is queried up. 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: JSP Details from OTS	TeleSales		By setting the profile, the user can allow JSP details in the TeleSales Application. If not set it is defaulted to No. The profile needs to be set to Yes to use the Sales Tools or view the source code from Marketing.	ASR	
		OTS: Lookup Export Directory Path	TeleSales		Sets the Lookup Export Directory Path for TeleSales.	ASRU	/home /
	11.5. 8	OTS: Marketing List All Campaigns	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, Opportuni ty	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. If the default value for the profile option is removed, then the application functions as if the value is 1.	ASRU	1 (system level)
	11.5.9	OTS: Opportunity History Expanded Display	TeleSales	Opportuni ty Center	Set to Yes to display the Opportunity History log with all nodes expanded. Set to No to display in collapsed format.	ASRU	Yes
	11.5.9	OTS: Order History - Default value for the Filter	TeleSales	eBusiness Center	Sets the Order tab default filter. Options are Order Status, Order Type, Order Source, or null.	ASRU	
	11.5.9	OTS: Order History - Number of months to Display Orders	TeleSales	eBusiness Center	Determines the default from, to date range for the Order tab. It is the number of months before the current date.	ASRU	12
	11.5.9	OTS: Order History View Orders across Operating Units	TeleSales	eBusiness Center	Yes to allow user to view order history for all operating units. Set to No to restrict orders to only those for the user's operating unit.	ASRU	Yes
		OTS: Order Source Code	TeleSales	Collateral	To order collateral through order capture, this collateral source code is used.	ASRU	1
		OTS: Primary Contact Role Flag	TeleSales	Organizati ons, Persons	Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window.	ASR	Y

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.8	OTS: Relate Account to Tasks and Notes	TeleSales	eBusiness Center Tasks	Set to Yes to automatically add the account displayed i the eBusiness Center header as related to the task being created. Profile can be set at the site, application, and responsibility levels.	ASR	No
	11.5.9	OTS: Relationship Plans - Enable Relationship Plans	TeleSales	eBusiness Center	Set to Yes to enable the relationship plans popup window from Oracle Customer Care	ASRU	
		OTS: Script Language	TeleSales	Scripting	Select the language to be used for scripts. If profile is not set, then the language is AMERICAN.	ASRU	
		OTS: Script Launch on Interaction	TeleSales	Scripting	When the profile *OTS: Scripting Installation* 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 *OTS: Scripting Installation* is set to Yes and the profile *OTS: Script Launch on Interaction* 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	

Req.	New	Profile Name	Product	Functions	Description	Level	Default
	11.5.9	OTS: Task Details-Query Task By	TeleSales	eBusiness Center, At a Glance	Set to Source to display tasks based on the origin of the task. Set to Reference to display any tasks related to the customer.	ASRU	Source
		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.		
	11.5.9	OTS: URL Web Collaborate Start Page	TeleSales	iMeeting	Enter the URL that is the start page when a user starts a new meeting	ASR	
		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	
	11.5.9	OTS: Use Primary Address to Create Lead in UWQ	TeleSales	Universal Work Queue	Set to Yes to use the primary address when creating a lead.	ASRU	
	11.5.9	OTS: Use Primary Address to Create Opportunity in UWQ	TeleSales	Universal Work Queue	Set to Yes to use the primary address when creating an opportunity.	ASRU	
	11.5.9	OTS: UWQ - auto launch lead and oppty center	TeleSales	Universal Work Queue	This is also a user profile. Set to Yes to open Lead Center and Opportunity Center when a new lead or opportunity is created in UWQ.	ASRU	
		OTS: UWQ Default Source Code	TeleSales	Universal Work Queue	Source Code to be used during Advanced Inbound Screen Pop	ASRU	
	11.5.9	OTS: UWQ - Display Source Code and Name for Opportunity Nodes	TeleSales	Universal Work Queue	Controls the display for opportunities in the UWQ. Options are None, Source Code Only, and Source Code and Name.	ASRU	None
		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	ASRU	Accepted
		Task Manager: Default Priority	TeleSales	eBusiness Center Task tab	Sets the default task priority in the Task tab of the eBusiness Center	ASRU	Medium

Req.	New	Profile Name	Product	Functions	Description	Level	Default
		Task Manager: Default Task Status	TeleSales	eBusiness Center Task tab	Sets the default task status in the Task tab of the eBusiness Center	ASRU	Open
		Task Manager: Default Task Type	TeleSales	eBusiness Center Task tab	Sets the default task type in the Task tab of the eBusiness Center	ASRU	Meeting
		Task Manager: Enable automated Task Workflow Functionality			Must be set to Yes to initiate the workflow. The profile is not used directly by TeleSales.	ASRU	No
		Task Manager: Owner Type for Task	TeleSales	eBusiness Center Task tab		ASRU	

B

Oracle Sales Online Wireless

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

See the following topics:

- Managing Organization Information
- Searching for Organizations
- Editing
- Viewing and Editing Sales Team Members
- Managing Persons
- Searching for Persons
- Using Sales Tasks
- Managing Your Opportunities
- Searching for Opportunities
- Viewing and Submitting Forecasts
- Viewing Bins
- Viewing Compensation
- Viewing Notes
- Using Fulfillment

B.1 Managing Organization Information

Use the following procedure to view and update organization information.

Steps

1. Select **Organizations** from the Main menu.
2. Search for an organization (see Searching for Organizations).

   A list of organizations that match your search criteria appears.
3. Select the desired organization from the list.

   A list of detail information appears.
4. Select a detail from the list to view or edit full details.
5. If you want to see persons related to this organization, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Person.**

      A list of types of relationships appears.
   c. Select the type of relationship.

      A list of persons appears.
   d. Select the person to view or edit details (see Editing).
6. If you want to see organizations related to this organization, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Organization.**

      A list of types of relationships appears.
   c. Select the type of relationship.

      A list of organizations appears.
   d. Select the organization to view or edit details (see Editing).
7. If you want to see opportunities related to this organization, then perform the following steps:
   a. Select **Opportunities.**

b. Select an opportunity from the list to view details.

c. If you want to edit an opportunity detail, then select it and enter the information.

d. If you want to see or edit the line item for an opportunity, then select **Line Details**.

e. If you want to see sales team members for an opportunity, then select **Sales Team.** (See Viewing and Editing Sales Team Members.)

B.2 Searching for Organizations

Use the following procedure to search for an organization.

Steps

1. On the Organization screen, select **Enter Organization Name.**
2. Enter at least four characters of the organization name.
3. Select **Submit.**
4. Optionally you can narrow the search with a postal code by performing the following steps:
   a. Select **Enter Postal Code.**
   b. Enter the postal code.
   c. Select **Submit.**
5. If you want the search results to include only those organizations that you can access, then select **Search.**
6. If you want to search the whole database, then select **Quick Find.**

A list of organizations appears.

B.3 Editing

You can edit information that appears on your screen in brackets by selecting the item and entering or deleting characters. If a screen contains the word *Edit* in the menu at the bottom of the screen, selecting Edit takes you to a screen that itemizes the information and shows the editable portion in brackets.

B.4 Viewing and Editing Sales Team Members

You can edit phone numbers and e-mail addresses for sales team members related to an opportunity and you can delete sales team members. Use this procedure to view and edit sales team members.

1. In the detail screen for opportunity select **Sales Team.**
2. A list of existing team members appears.
3. Select an individual team member.

   The team member's phone number and e-mail address appear.
4. If you are using a telephone and want to call the team member, then select the phone number to dial it.
5. If you want to change the phone number or address, then select it and enter the new information.
6. If you want to delete the team member, then select **Delete.**

B.5 Managing Persons

Use following procedure to view and update information about persons.

Steps

1. Select **Person** from the Main menu.
2. Search for a person (see Searching for Persons). A list of persons that match your search criteria appears.
3. Select the desired person from the list. Detail information appears.
4. If you are using a telephone and want to call the person, select the phone number to dial.
5. If you want to see persons related to this person, then perform the following steps:
   a. Select **Relationships.**
   b. Select **Person.**

      A list of types of relationships appears.
   c. Select the type of relationship.

      A list of persons appears.

d. Select the person to view or edit details.

6. If you want to see organizations related to this person, then perform the following steps:

   a. Select **Relationships.**

   b. Select **Organization.**

      A list of types of relationships appears.

   c. Select the type of relationship.

      A list of organizations appears.

   d. Select the organization to view or edit details.

7. If you want to see opportunities related to this person, then perform the following steps:

   a. Select **Opportunities.**

   b. If you want to see the opportunities where this person is the organization contact, then select **Contact Opp.**

   c. If you want to see the opportunities where this person is the customer, then select **Person Opp.**

   d. Select an opportunity from the list to view details.

   e. If you want to edit an opportunity detail, then select it and enter the information (see Editing).

   f. If you want to see or edit the line item for an opportunity, then select **Line Details** (see Editing).

   g. If you want to see sales team members for an opportunity, then select **Sales Team.** (See Viewing and Editing Sales Team Members.)

B.6 Searching for Persons

Use the following procedure to search for persons.

Steps

1. On the Person screen, select one of the following choices:

   - Enter Last Name
   - By Organization Name

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

A list of persons appears.

B.7 Using Sales Tasks

Use the following procedure to check your tasks.

Steps

1. Select **Tasks** from the Main menu.
2. Select the time period to view from the following choices:
   - Today
   - Tomorrow
   - Any one of the following three days
   - Go To Date: Enter the specific date in the format DD/MM/YY.

   The tasks summary displays all open tasks or the selected time period.
3. If you want to view open tasks that do not have dates, then select **Open Tasks.**
4. If you want to update detail information, then select the detail and change the information (see Editing).
5. Save any changes.

B.8 Managing Your Opportunities

Use the following procedure to quickly view critical opportunities.

Steps

1. Select **Opportunity** from the Main menu.
2. Search for opportunities. (See Searching for Opportunities.)
3. Select the desired opportunity from the list.

   Detail information appears.
4. If you want to update opportunity information, then edit any bracketed field in the opportunity detail screen (see Editing).
5. If you want to see or edit the line item for an opportunity, then select **Line Details** (see Editing).
6. If you want to view or edit sales team members for an opportunity, then see Viewing and Editing Sales Team Members.

B.9 Searching for Opportunities

Use the following procedure to search for opportunities.

Steps

1. On the Opportunity screen, select one of the following choices:
   - Enter Customer Name
   - Enter Opportunity Name
2. Enter at least four characters.
3. Select **Submit.**
4. If you want the search results to include only those opportunities that you can access, then select **Search.**
5. If you want to search the whole database, then select **Quick Find.**

A list of opportunities appears.

B.10 Viewing and Submitting Forecasts

Use the following procedure to quickly view your forecast or the forecasts of people who directly report to you and to submit forecasts.

Steps

1. Select **Forecast** from the Main menu.

   Forecasts for the default forecast category and sales credit type appear.

2. If you want to update and submit your forecast, then perform the following steps:

   a. Select the field to edit**.**

   b. Enter the new information.

   c. Select **Submit.**

   d. Select **Submit.**

3. If you want to view forecasts for your directs, then perform the following steps:

   a. Select **Directs** from the Forecast menu.

   b. Select the person’s name.

      The person’s forecast appears.

   c. If you want to view the forecast numbers, then select the forecast.

B.11 Viewing Bins

You set up through Oracle Sales Online the bins you want to see, such as My Forecasts, New Leads, Open Opportunities, and Won Opportunities. Use the following procedure to view your bins.

Steps

1. Select **Bins** from the main menu.

   A list of bins appears. The list is based on what is defined in Profile > Home Page > Narrow Bin Preferences. If no Narrow Bins are selected in the user's profile, then the following message appears instead of the Bins submenu:

   ```
   No bins have been setup in user profiles. Please update profile in Sales
   Online.
   ```

2. Select the bin to view.

   The detailed bin information appears.

B.12 Viewing Compensation

Use the following procedure to view compensation details.

Steps

1. Select **Compensation** from the main menu.
2. If you want to view your earnings, then perform the following steps:
   a. Select **Earning** from the compensation menu.
   b. Select **Pick Compensation Plan.**
   c. Select the compensation plan you want to view.
   d. Select **Pick Quota.**

      The Quota screen displays all the quotas and the combined total earnings for all quotas for the current period.
   e. Select a quota.

      The Earnings screen displays the earnings for the selected compensation plan and quota for the current period.
   f. If you want to change compensation plan, quota, or period, then select the link and change it.
3. If you want to view your achievements, then perform the following steps:
   a. Select **Achievements** from the compensation menu.
   b. Select **Pick Compensation Plan.**
   c. Select the compensation plan you want to view.
   d. Select **Pick Quota.**

      The Quota screen displays all the quotas for the current period.
   e. Select a quota.

      The Achievement screen displays the achievements for the selected compensation plan and quota for the current period.
   f. If you want to change compensation plan, quota, or period, then select the link and change it.
4. If you want to view your balance, then perform the following steps:
   a. Select **Balance** from the compensation menu.

b. Select **Periods.**

c. Select the period you want the balance to cover.

B.13 Viewing Notes

Use the following procedure to view notes attached to an organization or a person.

Steps

1. Find the organization or the person. (See Searching for Organizations and Searching for Persons.)
2. View the details for the selected person or organization.
3. Select **Notes.**

   A list of notes appears.
4. Choose a note to view the detail text. You cannot edit a note.
5. If the note is too long to view all, select **More** to view the next section of the note.

B.14 Using Fulfillment

This application uses Oracle Fulfillment to send electronic documents from your wireless device. Use this procedure to e-mail a cover letter with or without additional collateral to a customer or organization.

Prerequisites

Collateral pieces must be set up in Oracle Marketing before you can attach them to cover letters and send them through your wireless device.

Steps

1. Search for the person or organization. (See Searching for Persons or Searching for Organizations.)
2. Select the name to view details.
3. In the Person Detail or Organization Detail screen select **Fulfillment.**

   If the person or organization has an e-mail address, then the Select Cover Letter screen appears and you can continue to step 4.

If the person or organization does not have an e-mail address, then the Edit E-mail screen appears. Perform the following steps to add the e-mail address.

a. Enter the e-mail address.

b. Select **Submit.**

c. Select **Save.**

The Select Cover Letter screen appears.

4. Choose the particular cover letter you want to send. This sometimes requires drilling down through several levels to reach the desired cover letter.

The Select an Electronic Collateral screen appears.

5. Optionally, choose a collateral piece to send with the cover letter by performing the following steps:

a. Select **[]Enter Collateral Name.**

b. Enter the name or a partial name of the electronic collateral to search.

c. Select **Submit.**

d. Select **Search.**

A list of collateral items that match your search criteria appear.

e. Select the desired collateral.

6. Select **Show Cart.**

The Fulfillment Summary screen displays that a cover letter and collateral piece will be sent and the e-mail address. You can edit the collateral piece choice.

7. If you do not want to send the cover letter and collateral, then select **Cancel.**

8. If you want to send the cover letter and collateral, then select **Submit.**

The cover letter and chosen collateral are e-mailed to the customer or organization.

C

Oracle Sales Online Frequently Asked Questions

This appendix provides frequently asked questions and answers.

- Is it necessary to install iStore and iSupport to view the customer from the “360 Degree view”?
- How do we restrict the sales rep to view only the customers assigned to them?
- Where do you add a new relationship type to link up customer records?
- How do you modify the "Job Title" list of values under the person link?
- What are "Sales Teams"?
- What is "Full Access"?
- What is the functionality behind the "Keep Flag"?
- Can an assigning sales opportunity created in OTS be assigned to the appropriate sales person in OSO through territory manager?
- Cannot add sales reps to the sales team for an opportunity?
- Opportunity Tab: Why are we receiving "APP-45645: Close reason is missing" when setting Opportunity status to won?
- Customer Tab: Why are we receiving Security Access Failed error when accessing the Customer Tab?
- Opportunity Tab: Why are we receiving the following Java errors when going into the Opportunities Tab?
- Customer Tab: How do you create a new Competitor?

C.1 Frequently Asked Questions

Is it necessary to install iStore and iSupport to view the customer from the “360 Degree view”?

Answer:

Yes. In order to have full functionality in the 360 degree view iStore and iSupport needs to be installed. If you are not using the quoting functionality in Sales Onlineyou do not need to configure iStore and can have a shared install but you will need to apply the latest iStore patchset. You will need a full install of iSupport and will need to setup and apply the latest iSupport patches.

In future releases, the application will query directly from the iSupport tables so this configuration will no longer be necessary.

How do we restrict the sales rep to view only the customers assigned to them?

Answer:

You need to setup territories in order for the sales rep to only see the customers assigned to them and opportunities created on that customer. There are different options.

For more information about Territory Management consult the *Oracle CRM Application Foundation User Guide* and *Oracle CRM Application Foundation Implementation Guide*.

Where do you add a new relationship type to link up customer records?

Answer:

This is an AR lookup code, the lookup code is called PARTY_RELATIONS_TYPE.

In Oracle Sales Administrator responsibility navigate to:

Oracle Sales Setup > Lookup Codes > Receivables

Query Type = PARTY_RELATIONS_TYPE and add or disable the relationships types needed.

How do you modify the "Job Title" list of values under the person link?

Answer:

This is another Oracle Accounts Receivable lookup code called RESPONSIBILITY.

With Oracle Sales Administrator responsibility navigate to:

1. Oracle Sales Setup > Lookup Codes > Receivables
2. Query Type = RESPONSIBILITY and add or disable the responsibility types needed.

What are "Sales Teams"?

Answer:

Sales teams represent all of the salespeople and partners that have ownership of a specific customer or opportunity. Sales team members can have full or limited access (read only). Sales team members can be added manually or automatically using Territory Manager.

What is "Full Access"?

Answer:

Full access to the opportunity means that the sales representative who created the opportunity can add other sales team members, assign sales credits and update the likelihood that an opportunity will succeed.

What is the functionality behind the "Keep Flag"?

Answer:

The Keep Flag is used so that when you run the Assign Territory Program, even if the sales rep does not match the criteria to be assigned that account, the program will not delete that access record. Only the person with"Full" access, not territory or prospect access, should be able to update the keep flag.

The Keep Flag ensures that the salesperson is kept on the sales team. This is especially true for sales team creator which is why there's a default profile option called "OS: Sales Team Creator Keep Flag" which can be set to automatically default for the creator.

To set the Keep Flag: Log onto OSO with Sales Online Super Responsibility > Open an existing Opportunity > Click the Sales Team Link > Add a Sales Rep > then the name appears added to the team, and then there is that Keep Flag Check box that can be checked or unchecked.

Can an assigning sales opportunity created in OTS be assigned to the appropriate sales person in OSO through territory manager?

Answer:

Sales opportunity is a shared schema between OTS and OSO. Therefore, as long as a sales rep (either tele agent or field sales) has the privilege to see an opportunity, the opportunity shows up when they login in.

Create a test. Add a field sales rep into the sales team of an opportunity from OTS. Log into OSO as that field sales rep and you can see that opportunity.

The Territory Assignment Program (from Sales Admin) is on top of CRM Foundation/Territory module that's program generate the access records which are based upon the territory definition (compared to the manual assignment mentioned above).

If proper territory definition has been setup, an opportunity can be shared between OTS and OSO.

Cannot add sales reps to the sales team for an opportunity?

Answer:

We are unable to add sales reps to the sales team in the Opportunity details -> Sales team screen.

Customer is able to search for the selected sales rep and the search returns the matching sales rep criteria.

After selecting the sales rep via the hotlink, it returns to Sales team form and states:

"No records found matching the given criteria."

Check to see if the seeded role Account Manager was disabled.

When the "Account Manager" was disabled I was not able to add a team member to an opportunity.

Opportunity Tab: Why are we receiving "APP-45645: Close reason is missing" when setting Opportunity status to won?

Answer:

Set the OPP_OPEN_STATUS_FLAG from the AS_STATUSES_VL view to 'Y'. This flag is set using the Oracle Sales Administrator responsibility. The navigation path is: Oracle Sales Setup->Opportunities->Status.

Query up the 'Won' status. To change the flag value click the 'Open' check box.

The OPP_OPEN_STATUS_FLAG from the AS_STATUSES_VL view is set to 'N'.

The OPP_OPEN_STATUS_FLAG determines if a status is for open opportunities. If it is set to 'N' then a closure code is required. If users do not supply this reason they will receive the APP-45645 error.

Customer Tab: Why are we receiving Security Access Failed error when accessing the Customer Tab?

Answer:

Group Member Role for the Resource must be something other than Admin. Try using a role of Sales Manager.

According to the security rule, the login user who has Sales Role defined as ADMIN will not have privilege to create.

Opportunity Tab: Why are we receiving the following Java errors when going into the Opportunities Tab?

Error: java.lang.NumberFormatException:Zero length BigInteger java.lang.NumberFormatException: Zero length BigInteger at java.lang.Throwable.(Compiled Code) at java.lang.Exception.(CompiledCode) at java.lang.RuntimeException.(Compiled Code) at java.lang.IllegalArgumentException.(Compiled Code) at java.lang.NumberFormatException.(Compiled Code) at java.math.BigInteger.(Compiled Code) at java.math.BigInteger.(Compiled Code)

atjava.math.BigDecimal.(Compiled Code)
atoracle.apps.asf.opportunity.OpportunitiesVO.init(Compiled Code)at
oracle.apps.asf.webbean.TableWebBean.retrieveData(Compiled Code) at
oracle.apps.asf.webbean.TableWebBean.retrieveData(Compiled Code)at
oracle.apps.asf.webbean.WebBeanHandler.retrieveData(Compiled Code) at
oa_html.asfOpptySumryMain._jspService(Compiled Code) at
oracle.jsp.runtime.HttpJsp.service(Compiled Code)at
oracle.jsp.app.JspApplication.dispatchRequest(Compiled Code) at
oracle.jsp.JspServlet.doDispatch(Compiled Code) at
oracle.jsp.JspServlet.service(Compiled Code)at
javax.servlet.http.HttpServlet.service(Compiled Code) at
org.apache.jserv.JServConnection.processRequest(Compiled Code) at
org.apache.jserv.JServConnection.run(Compiled Code)at
java.lang.Thread.run(Compiled Code)

Answer:

The profile 'OS: Maximum Roll Days for Converting Amount' should have a numeric value. Set this profile option to a value of '0' or higher to keep this from occuring.

Customer Tab: How do you create a new Competitor?

Answer:

Follow these steps to create Competitors:

1. Create an internal organization under the Customer tab in Sales Online. Select the internal radio button.
2. Create another organization in Sales Online (who will be your competitor). Select the external radio button for this organization.
3. After creating the second organization who is to be the competitor, in the Customer Details screen, click on the red Relationship link.
4. Put the name of the internal organization created into the add an organization field and click on go.
5. Select the hyperlink for desired internal organization.
6. Chose Competitor from the list of values (LOV) for Relationship.
7. Click **Update**.

Why are we receiving the following errors: "Unable to resolve resource Role or Group ID" and "Invalid Application ID" when logging in?

Answer:

In order to access the application, the user must be defined as a valid Sales Person.

Please see Note: 135712.1 on the steps to setup a Sales Person for Sales Online.

What is HTML Quoting?

Answer:

The HTML Quoting feature in Oracle Sales Online allows sales representatives to create or manage quotes on a customer's behalf. Sales representatives can also submit the quote as an order if they have the permission to do so.

HTML Quoting enables companies to provide optimum customer service during the campaign and sales processes.

Do I need to install Oracle iStore to use HTML Quoting?

Answer:

Yes. Oracle iStore must be installed before using HTML Quoting.

HTML Quoting uses the iStore permissions, specialty stores, and shopping cart. You must setup at least one iStore specialty store with the products that you want the sales representatives to sell. The Quote tab in Sales Online will then access this specialty store.

Why can't I see the Create button on the Quote tab?

Answer:

The profile option OSO: Enable Quote is set to No. It must be set to Yes to enable quote creation.

Why can't I see any items when trying to create a quote?

Answer:

Verify if the iStore Search Concurrent programs have been run:

- iStore Section Search Refresh
- iStore Search Insert

These concurrent programs can be run from the iStore Administrator responsibility on the forms side.

Why do I get the 'Price not found' error when trying to add an item to the quote?

Answer:

You need to make sure that the IBE profile options that are listed in the HTML Quoting Implementation Guide have been set up at the Application level for Field Sales (Sales Online).

Some of the Profile options related toPricing are:

IBE: Use Price list associated with Specialty Store

IBE: Pricing Event Before Shopping Cart

IBE: Pricing Event for Shopping Cart

IBE: Request Type to get a Price

When placing an order, on the final Review Order Details screen, why is there no 'Place Order' button?

Answer:

Please verify the following setup through the admin console in jtflogin:

i) verify that the salesperson has been assigned the role, IBE_SALESREP_ROLE

ii) make sure the IBE_SALESREP_ROLE role has the IBE_CREATE_ORDER permission assigned

If either of the above have not been setup, then you may have the following situation:

- On the Quote Detail screen, you click on the Place Order button to place an order

- You will be taken thorough a series of screens with shipment and payment options to select

- However, on the final Review Order Details screen, there will be no 'Place Order' button to submit the order

Why do I get the 'not a salesrep' error when I click on the Quote button?

Answer:

Please verify the following setup:

- verify that the salesperson has been assigned the role, IBE_SALESREP_ROLE, through the admin console

- verify that profile MO: Operating Unit is set correctly. Check at Site, Application, Responsibility, and User levels.

On the Price Agreement screen, why am I not able to see my Agreement?

Answer:

Only Agreements that use the Standard Price List are currently supported.

D

Oracle Sales Online Seed Data

This appendix lists the seed data available in the Vision database: profiles and lookups.

- Section D.1, "Lookups"
- Section D.2, "System Profile Options"

D.1 Lookups

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*.

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.

D.1.1 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.

Table D–1

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/Amoun t).	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) Issues (Scheme, Issue Group Types, Currency) Customer Classification (Class Category)	Contact list filters	
	BUDGET_STATUS	APPROVED (Approved0 NOT_APPROVED (Not approved) PENDING (Pending)	Leads budget status	
	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Leads close reason	

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 opportunity0	Lead status	
	VEHICLE_RESPONSE_CODE	EMAIL FAX LETTER PHONE USER VOICE_MESSAGES WEB	Lead response channel	
	RELATIONSHIP_TYPE	ALL (seeded value)	Accounts	
	TAX_CODE		Accounts	
	PAYMENT_TERM		Accounts	
AMS	AMS_EVENT_PAYMENT_ STATUS		Events	
AR	ACCOUNT_STATUS		Accounts	

App.	Lookup Type	Values	Affects	Level
AR	ACCT_ROLE_TYPE		Accounts	
AR	ADDRESS_LABEL		eBusiness Center	
AR	CODE_STATUS		Persons, organizations, Accounts	
AR	COMMUNICATION_TYPE		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE	ADMINISTRATIVE_CONTACT_FOR (Administrative Contact For)	Persons, organizations	E
		BILL_PRESENTMENT_ADMIN (Bill Presentment System Administrator)		
		BILL_PRESENTMENT_CSR (Bill Presentment System Customer Service Representative)		
		BILL_PRESENTMENT_ORG_REP (Bill Presentment System Organization Representative)		
		BILL_PRESENTMENT_SITE_ADMIN (Bill Presentment System Site Administrator)		
		BILL_TO (Bill To)		
		BUYING_CONTACT_FOR (Buying Contact For)		
		CEO_OF (CEO)		
		CFO_OF (CFO)		
		CIO_OF (CIO)		
		CONTACT (Contact)		
		CORR (Correspondence)		
		DEPT_HEAD (Department Head)		
		DUN (Dunning)		
		EXECUTIVE (Executive)		
		KEY_DECISION_MAKER_FOR (Key Decision Maker)		
		LEGAL (Legal)		
		LEGAL_CONTACT_FOR (Legal Contact For)		

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE (continued)	MARKET (Market) MIDDLE_MANAGER (Middle Manager) PRIMARY_CONTACT_FOR (Primary Contact For) RECEIVING_CONTACT_FOR (Receiving Contact For) SHIPPING_CONTACT_FOR (Shipping Contact For) SHIP_TO (Ship To) STMTS (Statement) STOCK_HOLDER_OF (Stock Holder) TECHNICAL_CONTACT_FOR (Technical Contact For)		
AR	CONTACT_TITLE	DR (Dr.) MISS (Miss) MR (Mr.) MRS (Mrs.) MS (Ms.) SIR (Sir)	Persons, organizations	E
AR	CONTACT_TYPE		Persons, organizations, events, collateral	
AR	COUNTRY		eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting	
AR	CREDIT_RATING		Persons, Organizations	
AR	CUSTOMER_CATEGORY	CUSTOMER (Customer) PROSPECT (Prospect)	Accounts. persons, organizations	E

App.	Lookup Type	Values	Affects	Level
AR	CUSTOMER_TYPE		eBusiness Center	
AR	DAY		eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue	
AR	DECISION_FACTOR_TYPE		Accounts, Opportunity Contacts	
AR	DECISION_PRIORITY_TYPE		Accounts	
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

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)	Persons, Organizations	
		AFFILIATE_TO (Affiliate)		
		AGREEMENT_SIGNER_OF (Party that signs agreement on behalf of another party)		
		ASSOCIATE_OF (Associate of)		
		AUNT (Aunt)		
		BENEFACTOR_OF (Benefactor of)		
		BENEFICIARY (Beneficiary)		
		BILLER_AT (When an organization is registered biller)		
		BILLER_FOR (Biller For)		
		BILLTO_OF (Alternate billing party for the buyer)		
		BILL_CONSOLIDATOR_AT (Bill consolidator at)		
		BILL_CONSOLIDATOR_FOR (Bill Consolidator for)		
		BILL_PRESENTER_FOR (Bill Presenter at)		
		BILL_PUBLISHER_AT (Bill publisher at)		
		BILL_PUBLISHER_FOR (Bill publisher for)		
		BOARD_MEMBER_OF (Board Member)		
		BROTHER_OF (Brother)		
		BUSINESS_PARTNER_FOR (Business partner		
		CEO_OF (CEO)		
		CFO_OF (CFO)		
		CHANNEL_FOR (Channel)		
		CHILD_OF (child of)		
		CIO (CIO)		
		COMPETITOR_OF (Competitor)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE	CONSULTANT_FOR (Consultant)		
	(continued)	CONTACT_OF (Contact)		
		CONTAINS_MEMBER (Contains member)		
		COUSIN_OF (Cousin)		
		CUSTOMER_OF (Customer)		
		DAUGHTER_OF (Daughter)		
		DEPENDENT_OF (Dependent)		
		DIVISION_OF		
		DOMESTIC_PARTNER_OF (Domestic Partner)		
		DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of)		
		DOMESTIC_ULTIMATE_OF (Domestic Ultimate of)		
		EMPLOYEE_OF (Employee)		
		EMPLOYER_OF (Employer)		
		FATHER_OF (Father of)		
		FIELD_SERVICE_PROVIDER_FOR (Field Service provider)		
		GENERAL_EMPLOYEE_OF (General Employee)		
		GLOBAL_SUBSIDIARY_OF (Global subsidiary of)		
		GLOBAL_ULTIMATE_OF (Global Ultimate of)		
		GUARANTOR_FOR (Guarantor)		
		GUARDIAN_OF (Guardian)		
		HEADQUARTERS_OF (Headquarters of)		
		KEY_DECISION_MAKER_FOR (Key decision maker)		
		LEGAL_COUNSEL_FOR (Legal counsel for)		
		MANAGER_OF (Manager_of)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE	ACK (Acknowledgments)	Persons, Organizations	
		ADMINISTERED_BY (Administered By)		
		BILL_TO (Bill To)		
		BOL (Bills of Lading)		
		BUSINESS (Business)		
		CM (Credit Memos)		
		COLLATERAL_MAIL_TO (Collateral Mail To)		
		CORR (Correspondence)		
		CUSTOMER_REGION (Customer Region)		
		DELIVER_TO (Deliver To)		
		DRAWEE (Drawee)		
		DUN (Dunning)		
		GENERAL_MAIL_TO (General Mail)		
		HEADQUARTERS_FOR (Headquarters for)		
		HOME (Home)		
		INCORPORATED_TO (Incorporated)		
		INSTALL_AT (Install At)		
		INV (Invoice)		
		ISSUED_BY (Issued By)		
		KEY_SITE (Key Site)		
		LEGAL (Legal)		
		LEGAL_ADDRESS_OF (Legal Address)		
		LEGAL_RESIDENCE_OF (Legal Residence)		
		MARKET (Market)		
		MARK_FOR (Mark For)		
		NOT_ALLOWED_INTO (Not Allowed Into)		
		OFFER_TO (Offer to)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE (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 (Home0 MOBILE (Mobile) OFFICE (Office) PAGER (Pager)	Persons, organizations, opportunities	E
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	RESPONSIBILITY	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Recievable Supervisor) CFO (Chief Financial Officer) COLCT (Collections) COLCTSUP (Collections Supervisor) CONTRLR (Controller) GLC (General Ledger Clerk) GLS (General Ledger Supervisor0 SOC (Sales Operation Clerk) SOS (Sales Operations Supervisor) TRSUR (Treasurer)	Persons, organizations, Universal Work Queue	E
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	ACCESS_PRIVILEGE	F (Full unrestricted access) P (Prospecting Access) T. (Sales Team Access)	Access privilege for employee	S

App.	Lookup Type	Values	Affects	Level
AS	ASTATA_RUN_MODE	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)	Run mode for Territory Assignment concurrent program	S
AS	AUTO_ASSIGNMENT_TYPE	Both None PRM TAP	Automatic assignment type	S
AS	BUDGET_AMOUNT		Leads, lookup	
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Opportunity close reason	E
AS	CONTACT_RANK_ON OPPORTUNITY	DECISION_MAKER END_USER	Opportunity contact rank	U
AS	DECISION_TIMEFRAME		Leads	
AS	FLAG	N (No) Y (Yes)	Flag	S
AS	INTEREST USE	COMPANY_CLASSIFICATION (Customer Classification) CONTACT_INTEREST (Contact Interest) LEAD_CLASSIFICATION (Lead or Opportunity Classification)	Interest use	S
AS	INTEREST_USE		Opportunities	
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	ROLE_TYPE		Sales Team	

D.2 System Profile Options

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)

For more information, please refer to the *Oracle Sales Online Implementation Guide*.

D.2.1 Setting System Profile Options

The procedure for setting up and changing system profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Use this procedure to set or change profile options.

Steps

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

   The Find System Profile Values window appears.

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

   The profiles are displayed in the System Profile Values window.

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

D.2.2 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.
- **Default**: Lists the seeded default for the profile, if any.

Req.	New	Profile Name	Product	Functions	Description	Default
		AMS: Should Call To Inventory Modules To Be Made	TeleSales	Events	Must be set to *Yes* for Oracle TeleSales.	
		AMS: Should Call to Pricing Modules to Be Made	TeleSales	Events	Must be set to *Yes* for Oracle TeleSales.	
		AS_CURRENCY_CODE	Sales Online	Contact lists	Default currency code in Issues Filter page. This default value will be ignored if no Price is entered or no Issue is entered on that page.	
		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.	

Req.	New	Profile Name	Product	Functions	Description	Default
		ASL: Enable Configurator	Field Sales/Lap top			
		ASL: Enable Encyclopedia	Field Sales/Lap top	Marketing Encyclopedia		
		ASL: Enable Selective Download	Field Sales/Lap top			
		ASO: Automatic Numbering	TeleSales			
		ASO: Default Order Category	OSO TeleSales	Collateral, events	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.	Order Capture
		ASO: Default Order Type	TeleSales	Opportunities, collateral	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form launched from the Quote/Order tab.	
		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
		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

Req.	New	Profile Name	Product	Functions	Description	Default
	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
		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 Order: Marketing Lists	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.	
		IEU: Queue Order: My Team Leads	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.	
		IEU: Queue Order: My Team Opportunities	TeleSales	Universal Work Queue	Determines the order of appearance for the queue.	
		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	Determines if a user can work on Leads.	
		IEU: Queue: My Team Opportunities	TeleSales	Universal Work Queue	Determines if a user can work on Leads.	

Req.	New	Profile Name	Product	Functions	Description	Default
		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 Installion Tasks Java Class Full Name for CRM Mobile Application	Field Sales Laptop		Post Installion 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
		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.	

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Allow Updating Frozen Opportunities	TeleSales Sales Online	Opportunities	Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze check box selected. This profile can be set at either the responsibility or the user level. When set to *Y*, this profile option allows the user or responsibility to make changes. An *N* setting at the responsibility level prevents all users from making modifications to an opportunity after the Freeze check box is selected. This includes the Freeze check box itself.	Yes
		OS: Always Put Customer Creator on Sales Team	Sales Online	Sales Team	If set to Yes, will always add the creator of a customer to the sales team. If set to No, creator of customer will not automatically be added to the sales team.	
		OS: Assign New Lead	TeleSales Sales Online	Lead	if this profile is set to No, then the application uses the Territory Manager to automatically assign the resources to the lead. The first person the Territory Manager assigns becomes the owner. The rest of the resources in the territory become sales team members on the lead. if this profile is set to Yes, then the agent must enter the onwer manually using the Owner drop-down list. If the agent does not make an entry, then the lead is assigned to the default user set in OS: Default Resource ID. If no default resource is set, then application assigns ownership to the user creating or updating the lead.	No
		OS: Auto Assigning from Lead Import	Sales Online TeleSales	Lead		Yes
		OS: Auto Qualify Lead	TeleSales Sales Online	Lead	Turns automatic qualification for sales leads on or off. A setting of Yes, causes the application to attempt to qualify a lead each time the lead is updated. A setting of No means the user must qualify the lead manually by selecting the Qualified check box. If this profile is not set, it is defaulted to 'N'	Yes
		OS: Auto Ranking from Lead Import	Sales Online	Lead		Yes

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Auto-relate Lead note to Customer	Sales Online TeleSales		Relate a newly created lead note to it's party automatically. AS_NOTES_LEAD_ CUSTOMER	Yes
		OS: Auto-relate Lead note to Primary Contact	Sales Online TeleSales		Relate a newly created lead note to it's pimary contact automatically. AS_NOTES_ LEAD_CONTACT	No
		OS: Auto-relate Opportunity note to Customer	Sales Online		Relate a newly created opportunity note to it's party automatically. AS_NOTES_OPP_ CUSTOMER	Yes
		OS: Auto-relate Opportunity note to Primary Contact	Sales Online TeleSales		Relate a newly created opportunity note to it's primary contact automatically. AS_ NOTES_OPP_CONTACT	No
		OS: Auto-relate Relationship note to Object	Sales Online TeleSales		Relate a newly created relationship note to it's object automatically. AS_NOTES_REL_ OBJECT	Yes
		OS: Auto-relate Relationship note to Subject	Sales Online		Relate a newly created relationship note to it's subject automatically. AS_NOTES_ REL_SUBJECT	Yes
		OS: Budget status required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a budget status for a lead before that lead can be qualified.	Yes
		OS: Calendar Setting Required for Assignment	Sales Online		Calendar setting required for sales lead assignment.	No
		OS: Campaign code required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a campaign code for a lead before that lead can be qualified.	Yes
Yes		OS: Compensation Sales Credit Type	TeleSales Sales Online	Opportunities	Compensation sales credit type.	
		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

Req.	New	Profile Name	Product	Functions	Description	Default
		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
		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	**Full:** The user can view and update all customers. Generally, this access is given to super users only. **Prospecting:** Users can view all customers but can update customer information only if they are on the sales team. **Sales Team:** Users can view and modify customer information when they are on the sales team.	Full
		OS: Customer Sales Team Default Role Type	TeleSales Sales Online	Organizations, Persons	Assigns a role type to a new sales team member if no role is specified by the user.	Account Manage r
		OS: Daily Conversion Type	TeleSales Sales Online	Opportunities	Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types.	Corpora te
		OS: Date Mapping Type	Sales Online		Date mapping type	S
		OS: Dead Lead Status	Sales Online TeleSales	Leads	Dead lead status	DEAD_ LEAD
		OS: Decision Time Frame Required	TeleSales Sales Online		Decision time frame required	Yes

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Default Address Style	Sales Online		Default address style	AS_ 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	

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Default Resource ID Used for Sales Lead Assignment	TeleSales Sales Online	Leads	Sets up default resource to receive any imported leads not assigned by the territory management module.	
		OS: Default Sales Channel	TeleSales Sales Online	Opportunities	Default sales channel for new opportunities	Direct
		OS: Default Status for Leads	Sales Online TeleSales	Leads	Default Status for Lead	New
		OS: Default Vehicle Response Code for Leads	Sales Online TeleSales	Leads	Default Vehicle Response Code for Leads	User
		OS: Default Vehicle Response Code for Opportunity	Sales Online TeleSales		Default Vehicle Response Code for Opportunity	User
		OS: Default Win/Loss Status	Sales Online		Default Win/Loss Status	None
		OS: Degree of Parallelism	Sales Online		Degree of Parallelism for concurrent program	4
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	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			
		OS: Lead Link Status	Sales Online TeleSales	Leads	Lead Link Status	CONVE RTED_ TO_ OPPOR TUNITY

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Lead Routing Status	Sales Online TeleSales	Leads	Lead Status after Routing	New (seeded value)
Yes	Yes	OS: Linking Opportunity to Lead	TeleSales	Opportunities	There are three settings for this profile: 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. Allowed-If selected, allows the user to create a link to a lead through the Leads link on the Opportunity detail page. Not allowed-If selected, does not allow users to create links to leads.	Prompte d
		OS: Manager Update Access	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	This profile option sets the level of access for sales team members with the role of TeleSales Manager to update information for their subordinates in the sales organization. This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege. This profile has three possible settings **Update data**: Update. **Inherit data**: Inherit access privilege from subordinate. **View data**: View data only.	R
		OS: Maximum Roll Days for Converting Amount	TeleSales Sales Online	Opportunities	Maximum roll days for converting currency amounts if no daily conversion rate exists.	
		OS: Move Opportunities	Sales Online	Opportunities	Move Opportunities	Open
		OS: Move Sales Leads	Sales Online	Leads	Move Sales Leads	

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Opportunity Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	**Global Full:** Users can view and update all opportunities whether they are on the sales team or not. Generally, this access is given to super users only. **Org Full** (Full by Organization)**:** Users can view and update all opportunities whether or not they are on the sales team. However, they are restricted to viewing and updating data for the HR organization they are assigned to in Oracle HRMS. **Prospecting:** Users can view all opportunities but they can make changes only when they are on the sales team. Users can create opportunities for a customer only when they are on that opportunity's sales team. **Sales Team:** Users can view opportunities only when they are on the sales team. When the opportunity creator selects the Full Access check box on the Sales Team tab for a team member, that team member can update the opportunity. Otherwise the record is view only.	Global Full
		OS: Opportunity Probability Link	TeleSales Sales Online	Opportunities	Determines whether a warning or error is given if the win probability amount does not fall within the sales stages probabilities.	Warning
		OS: Opportunity Rollup Override Flag	Sales Online TeleSales	Opportunities	Determines whether the Not Null Opportunity header fields will be updated during rollup.	Yes
		OS: Opportunity Sales Credit Enforce Sales Team Definition	TeleSales Sales Online	Opportunities	If set to *Yes*, only people on the sales team are allowed to receive sales credit. A sales 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	
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.	

Req.	New	Profile Name	Product	Functions	Description	Default
		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: 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.	
		OS: Sales Admin Update Access	TeleSales Sales Online	eBusiness Center, organizations, persons, lookup	An employee with the TeleSales Administrator role (as defined in the Resource Manager) can access the same records as the manager of the group they are assigned to. Groups are also set up in Resource Manager. The access can be of three types: **Update data**: The administrator can update the same data as the manager of the group. **Inherit data**: Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates. **View Data**: Administrators can only view the data created by the manager's subordinates.	R
		OS: Sales channel required	TeleSales Sales Online	Lead management	A setting of Y requires users to enter a sales channel for a lead before that lead can be qualified.	Y

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Sales Lead Access Privilege	TeleSales Sales Online	eBusiness Center, organizations, persons	Controls the level of access to leads. The available settings are: **Full**: Employees can view and modify all leads, even those not assigned to them. **Sales Team**: Only the employee who has been assigned the lead can view and modify it. **Prospecting**: Employees can view all leads but cannot update any.	Full
		OS: Sales Lead Aging Abandon-Action	Sales Online TeleSales	Leads	Sales Lead Aging Abandon-Action	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
		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 sort_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. 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

Req.	New	Profile Name	Product	Functions	Description	Default
		OS: Source Code Required for Opportunity	Sales Online	Opportunities	Source Code Required for Opportunity	No
		OS: Territory Minimum Number of Records for Parallel Processing	Sales Online TeleSales		If the number of records to process (in AS_ CHANGED_ACCOUNTS 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
		OS: Territory Number of Child Processes	Sales Online TeleSales		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
		OS: Territory Records to Open for Processing Changed Accounts	Sales Online TeleSales		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

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Default Account Site Use	Sales Online		Default Account Site Use	BILL_ TO
		OSO: Default Address Lines	Sales Online		Default Address Lines	2
		OSO: Default Address Type	Sales Online		Default Address Type	MARKE T
		OSO: Default Country	Sales Online		Default Country	US
		OSO: Default Customer Category	Sales Online		Default Customer Category	CUSTO MER
		OSO: Default for Show Quick Task	Sales Online		Default for Show Quick Task	No
	Yes	OSO: Default Forecast Category	Sales Online	Forecasting	Setting to determine the default forecast category used when forecasting.	1
		OSO: Default Forecast Currency	Sales Online	Forecasting	Setting to determine the default forecast currency used for forecasting.	USD
		OSO: Default Forecast Period Type	Sales Online	Forecasting	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	EMPLO YER_OF
		OSO: Default Person Phone Type	Sales Online		The Default Person Phone Type	GEN
		OSO: Default Person Relationship	Sales Online		The Default Person Relationship	EMPLO YEE_OF

Req.	New	Profile Name	Product	Functions	Description	Default
		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.	
		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 appplication 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 Subordinate Current Pipeline	Sales Online	Forecasting	Setting to determine whether subordinate current pipeline should be displayed.	Yes

Req.	New	Profile Name	Product	Functions	Description	Default
		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 Quote	Sales Online		Enables quotes	No
		OSO: Enable Record Count in Tables	Sales Online		Enables record count in tables	No
		OSO: Forecast Autosubmit Worksheets	Sales Online	Forecasting	Setting to determine which worksheets are automatically submitted with submitting a forecast.	None
		OSO: Forecast Calendar Month	Sales Online	Forecasting	Setting to determine the number of calendar months you can move forward or backwards when viewing.	6
		OSO: Forecast Max Generate Months	Sales Online	Forecasting	Maximum number of months generated when generating multiple forecasts.	6
		OSO: Home Page Timeout	Sales Online	home page	Time used to retrieve bin data on home page.	5000
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
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

Req.	New	Profile Name	Product	Functions	Description	Default
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 Buy/Sell Indicator	Sales Online	Contact lists	Default flag for Buy/Sell/Any in Issues Filter page. This default value is ignored if no Issue is entered on that page.	B (B/S/A)
	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 Issue Scheme	Sales Online	Contact lists	Default scheme to be used to search for issues. This default value will be ignored if no Issue is entered on that page.	To be decided.
	Yes	OSO: List Query Default Maximum Issue Blocks	Sales Online	Contact lists	How many blocks of filter conditions can be used in Issues Filter page.	2
	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
		OSO: Max Legend Label Length	Sales Online		Maximum number of characters in chart legend labels.	22

Req.	New	Profile Name	Product	Functions	Description	Default
		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
		OSO: Original System Reference URL	Sales Online			URL
		OSO: Performance Warning	Sales Online		Performance Warning	

Req.	New	Profile Name	Product	Functions	Description	Default
		OSO: Person Detail Security Check	Sales Online		Person Detail Security Check	
		OSO: Person Original System Reference URL	Sales Online		Person Original System Reference URL	
		OSO: Projects Integrated	Sales Online		Whether Projects application is installed and should be integrated with Sales Online.	No
		OSO: Quick Find On	Sales Online		Profile to render Quick Search	
		OSO: Quick Find Security Check	Sales Online		Quick Find Security Check	
		OSO: Record View Tracking Max Period	Sales Online	Controls indicators	Works in conjunction with OSO: Display Tracking Information and OSO: Record View Tracking Period to control the star (new record) and circle (updated by another user) indicators on summary pages.	14
		OSO: Record View Tracking Period	Sales Online	Controls indicators	Record view tracking period must be a value less than ASF_RECORD_VIEW_ PERIOD. Works in conjunction with OSO: Record View Tracking Max Period and OSO: Display Tracking Information to control the star (new record) and circle (updated by another user) indicators on summary pages.	14
		OSO: Relationship Original System Reference URL	Sales Online		Relationship Original System Reference URL	
		OSO: Resultset Cache On	Sales Online		This should be turned off if translated values are not seen in tables.	No
		OSO: Search Lead Wildcard	Sales Online		Can % be the first character in search sent to list of values.	No
		OSO: SQL Trace On	Sales Online		SQL trace on	No
		OSO: Subordinate Current Pipeline	Sales Online		Display subordinate current pipeline	Yes
		OSO: Wireless User Device	Sales Online Wireless		Wireless device used by the user	PHONE
		OTS: Advanced Inbound Installation	TeleSales	Universal Work Queue	Set to *Yes* if Advanced Inbound has been installed.	Yes
		OTS: Advanced Outbound Installation	TeleSales	Universal Work Queue	Set to *Yes* if Advanced Outbound has been installed.	Yes

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: Amount Scaling Factor	TeleSales		To display the amount field	
		OTS: ANI with No Area Code	TeleSales		Used to match the Telephony Caller ID with Customer Telephone Number	
		OTS: Associate Relationship Location To Organization	TeleSales	Addresses	A setting of Yes, causes any address you enter for a contact at an organization (party of type party relationship) automatically to become an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. A setting of No turns this feature off.	Yes
		OTS: Contact Role	TeleSales	Organizations, Persons	Sets the default contact role for an organizational contact.	Contact
		OTS: Create Order for Event	TeleSales		Creates an order for an event.	No
	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.	
		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.	
		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.	
		OTS: Default Collateral Subject Line	TeleSales	Event confirmation letter	Enter the subject line for the collateral confirmation email.	
		OTS: Default Country	TeleSales	Organizations, Persons	Sets the default country used for address creation.	US
	new	OTS: Default Cover Letter for Collateral Requests	TeleSales	Collateral	Used to populate the cover letter item once a collateral is selected from the list of values.	
		OTS: Default Event Reply to Email Address	TeleSales	Event confirmation letter	Enter the email address you want event enrollees to use for replying to enrollment confirmation emails.	
		OTS: Default Event Subject Line	TeleSales	Event confirmation letter	Enter the subject line for the enrollment confirmation email.	

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: Default Note Type	TeleSales		Default type for a new note	AS_ USER
		OTS: Default Party Type	TeleSales	Organizations, Persons	Sets the default party type for the eBusiness Center header. Available values are: Person Organization Party Relationship	PARTY_ RELATI ONSHIP
		OTS: Default Person Title	TeleSales	Organizations, Persons	Sets the default title for a person in the eBusiness Center header.	
		OTS: Default Phone Line Type	TeleSales	Organizations, Persons	The default phone type for the eBusiness Center header.	GEN
		OTS: Default Relationship	TeleSales	Organizations, Persons	The default relationship between parties.	CONTA CT_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.	EMAIL
		OTS: Default Shipping Method for Physical Collateral	TeleSales	Collateral	Defines the default shipping method for physical collateral.	
		OTS: Default Site Usage	TeleSales	Organizations, Persons	The default type for the address in the eBusiness Center header. For example: Bill to, Ship to.	
		OTS: Default Tab in eBusiness Center	TeleSales	eBusiness Center	Determines which tab is active when the user launches the Oracle TeleSales eBusiness Center	AST_ EBC_ INT
		OTS: Default Tab in Opportunity Center	TeleSales		Determines which tab is active when the user launches the Opportunity Center	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	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.	

Req.	New	Profile Name	Product	Functions	Description	Default
	obso lete	OTS: Default Task Status	TeleSales		Default Task Status. Replaced with two profile options: Task Manager: Default Assignee Status, Task Manager: Default Task Status	15
		OTS: Default Universal Search Tab	TeleSales		Default Universal Search Tab	Quick Search
		OTS: Default Universal Search Type	TeleSales		Default Universal Search Type	Organiz ation
		OTS: Default User Role	TeleSales	Selection of role	Entering a default user role and group 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.	
		OTS: Default User Role and Sales Group	TeleSales	Selection of role and group	Obsolete. Replaced by OTS: Default User Role and OTS: Default Sales Group	
		OTS: Display Customer Profile	TeleSales	eBusiness Center	A setting of *Yes* enables the customer profile area of the eBusiness Center. A setting of *No* means the fields are disabled.	No
	Yes	OTS: Display In-Active Records For Party LOV	TeleSales	eBusiness Center	Set to Yes to display inactive as well as active customers in the Organization, First Name, and Last Name LOVs. Set to No 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.	Yes
		OTS: Enable Address Validation	TeleSales	Organizations, Persons	A setting of *Yes* turns on address validation.	No
		OTS: Enable Customer Standard Navigation	TeleSales		To enable or disable navigation to Customer Standard from the eBusiness Center.	Yes
	11.5. 8	OTS: Enable Email Center Integration	TeleSales	eBusiness, Opportunity, and Lead Centers	If set to Yes, 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.	Yes
		OTS: Enable SQL Tracing	TeleSales		To enable or disable SQL tracing	No
		OTS: Generate Collateral Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of collateral activities such as sending out collateral.	No
		OTS: Generate Customer Activity	TeleSales	Universal Work Queue	If set to *Yes*, the application generates a record of activities related to customer records.	No

Req.	New	Profile Name	Product	Functions	Description	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.	
		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.	
		OTS: Interaction Auto Wrap-up Enabled	TeleSales		If set to Yes, interaction will be wrapped up atumatically without showing the wrapup window.	
		OTS: Interaction Default Action	TeleSales		Interaction Default Action	
		OTS: Interaction Default Action Item	TeleSales		Interaction Default Action Item	
		OTS: Interaction Default Outcome	TeleSales		Interaction Default Outcome	
		OTS: Interactions-Record Media Item ID	TeleSales		Setting this profile will not Record Media Item during interaction.	
		OTS: Interactions-Start On Query	TeleSales		When interaction is enabled, setting this profile to Yes will start an interaction when a record is queried up.	
		OTS: JSP Details from OTS	TeleSales		Allow JSP Details from OTS	
		OTS: Lookup Export Directory Path	TeleSales		Lookup Export Directory Path	/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.	No
		OTS: Match DNIS FOR Campaign	TeleSales		Setting this profile will make the TeleSales UWQ foo function to search campaign by DNIS.	No
		OTS: Max Interactions Displayed	TeleSales	eBusiness Center	Determines how many interactions to display in the overview tab.	10
		OTS: Minimum Number of Characters for Lookup	TeleSales	All searches	Improves search performance by forcing agents to use a minimum number of characters for their searches.	None

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: No Media Item Interaction	TeleSales		Setting this profile will not record media item during interactions.	
		OTS: Notes Interaction Activity	TeleSales	Interactions	If you wish to track activities for notes, then set this profile option to *Yes*.	
		OTS: Number of Months to view Notes and Interactions for	TeleSales		Default value for months of notes/interactions to view	
		OTS: Order Source Code	TeleSales		To order collateral through order capture, this collateral source code is used.	1
		OTS: Primary Contact Role Flag	TeleSales	Organizations, Persons	Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window.	Y
		OTS: Queue Order: Forecasts	TeleSales		Determines the order of appearance for the queue.	
		OTS: Queue Order: Leads	TeleSales		Determines the order of appearance for the queue.	
		OTS: Queue Order: Opportunities	TeleSales		Determines the order of appearance for the queue.	
		OTS: Queue Order: Quotes	TeleSales		Determines the order of appearance for the queue.	
	11.5.8	'OTS: Relate Account to Tasks and Notes	TeleSales	eBusiness Center Tasks	Set to Yes to automatically add the account displayed i the eBusiness Center header as related to the task being created. Profile can be set at the site, application, and responsibility levels.	
		OTS: Script Launch on Interaction	TeleSales		Script Launch on Interaction	
		OTS: Script Launch on UWQ Delivery	TeleSales		Script Launch on UWQ Delivery	
		OTS: Scripting Installation	TeleSales	Universal Work Queue	Set to *Yes* if scripting has been installed for TeleSales.	
		OTS: Show All Lists	TeleSales	Universal Search	Setting this profile to "No" displays only your own lists in Universal Search. A setting of "Yes" displays all lists in Universal Search.	No
		OTS: Show Campaign and Offer Names Instead of Codes	TeleSales		If set to yes, shows the campaign and offer name instead of code.	
		OTS: TeleSales Interaction Enabled	TeleSales	Interactions	If set to Yes, TeleSales records interactions after the interaction is started.	No

Req.	New	Profile Name	Product	Functions	Description	Default
		OTS: TeleSales Interactions on Query Enabled	TeleSales	Interactions	If set to Yes, will begin an interaction once the record is queried up.	
		OTS: UWQ Default Source Code	TeleSales		Source Code to be used during Advanced Inbound Screen Pop	
		Start Menu In Quick Menu	TeleSales	eBusiness Center	Set the value to `TeleSales Quick Menu` to enable the Quick Menu for TeleSales. All applications using Quick Menu share this profile option.	
		Task Manager: Default 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			

Glossary

call sheet

Call sheets are lists, generated from contact lists, of people with which you want to have an interaction.

CRM

CRM is an acronym for Customer Relationship Management.

customer

Defined as an organization, person, or contact.

DUNS number

Dunn and Bradstreet number

E-Business Suite

Oracle Sales Online is part of the Oracle E-Business Suite, an integrated suite of applications for the enterprise, including both ERP and CRM.

ERP

ERP is an acronym for Enterprise Resource Planning.

Flexfields

Flexfields allow you to customize data fields to meet your specific organizational needs.

forecast

A predicted amount of sales for a specific time period.

forecast threshold

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

Thresholds are not converted if you change your currency. If you change your currency for forecasting, you need to set the threshold amount accordingly.

Income Planner

Calculates compensation and performs "what if" scenarios to view actual compensation. Intended to motivate and incent the sales force by viewing possible compensation.

organization

A customer that is an organization.

person

A customer that is a person.

profiles

Profiles are used in this application to govern the way the application works.

sales executive

Manages sales managers and sales representatives.

sales manager

Manages one or more sales representatives.

Sales Methodology

A Sales Methodology is a way to help sales people sell their products within a set of standard guidelines to assist the sales representative through the sales cycle. Oracle Sales Online provides this functionality through the creation of tasks in various stages of the sales cycle.

sales representative

Does not manage any other sales representatives. However, a sales manager can also have a role as a sales manager with a different login.

SIC

Standard Industry Code

Trading Community Architecture (TCA)

Oracle Trading Community includes a database schema, api's, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together.

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