Oracle® Field Sales/Laptop

Concepts and Procedures

Release 11*i*

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Oracle Field Sales/Laptop Concepts and Procedures, Release 11*i*

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Contents

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Preface

This Concepts and Procedures Guide provides information and instructions to help you work effectively with Oracle Field Sales/Laptop, Release 11*i*.

This preface explains how the guide is organized and introduces other sources of information that can help you.

Introduction to Oracle Field Sales/Laptop

Oracle Field Sales/Laptop is an HTML based application which provides sales managers, sales representatives, and sales executives assistance in managing their business opportunities, customers, forecasting, compensation, partners, and more. Field Sales/Laptop enables the management of business data using the Trading Community Architecture (TCA) customer model. TCA enables Oracle Field Sales/Laptop to support complex relationships which further allows Oracle Field Sales/Laptop users to provide exceptional service to customers.

Intended Audience

This guide is aimed at the following users:

- Sales Representatives
- Sales Managers

Structure

This manual contains the following chapters:

Understanding Oracle Field Sales/Laptop" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Using Oracle Field Sales/Laptop" provides process oriented, task based procedures for using the application to perform essential business tasks.

Related Documentation and Resources

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

Installing Oracle Applications, Release 11i

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*.

Oracle Applications Product Update Notes, Release 11i

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

Oracle Applications System Administrator's Guide

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

Oracle Applications User's Guide

This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11*i*.

Additional Product-Related Documentation

Oracle Applications Supplemental CRM Installation Steps

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

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

This guide describes set up and configuration tasks for all the foundation components.

Oracle CRM Foundation Technical Reference Manual

This manual contains table and view descriptions for all the Oracle CRM foundation components.

Oracle Sales Online Technical Reference Manual

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

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Understanding Oracle Field Sales/Laptop

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

Click here to navigate to content links.

Content Links

- Understanding Trading Community Architecture
- Understanding the Mobile Device Gateway
- Overview of Functionality
- About Navigating through Oracle Field Sales/Laptop
- Using Oracle Field Sales/Laptop
  - Logging In
  - Your Home Page
  - Synchronizing
  - Calendar Tab
  - Opportunity Tab
  - Forecast Tab
  - Customer Tab

Understanding Trading Community Architecture

The Field Sales/Laptop customer model is based on 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. 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. Even though the appliance manufacturer may not even have direct relationships with all the members of its trading community, it is important that he know about these entities and how they relate to others within the trading community.

The key entities in the Oracle Trading Community data model are listed below:

- **Party**: an entity that can enter into business relationship

    - **Organization**

    - **Person**

    - **Group**

- **Location**: a point in geographical space described by a street address

- **Party Site**: links a party with a location, indicating that party's usage of the location

- **Organization Person**: a person in the context of an organization, modeled as a relationship between an organization and a person

- **Party Relationship**: a binary relationship between two parties such as a partnership. A party relationship is optionally a party itself, meaning certain party relationships (such as Organization's People) can enter into relationships themselves.

- **Contact Point**: a means of contacting a party, for example, a phone number, email address, or fax number

- **Customer Account**: models a customer relationship between the company deploying Oracle Applications and a party

- **Customer Account Site**: a party site that is used within the context of a customer account, for example, for billing or shipping purposes

- **Customer Account Contacts**: a party contact that is used within the context of a customer account

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Understanding the Mobile Device Gateway

The Mobile Device Gateway (MDG) is a middle-tier server that acts as the interface between the CRM enterprise database and the Field Sales/Laptop and Palm applications. It is designed using a three tier architecture, allowing for scalability and strategic deployment of the server for data load balancing. Gateway servers can be located in remote sales and service offices close to the mobile worker while the server would talk to the main enterprise database over a LAN (local area network) or a WAN (wide area network).

The Mobile Device Gateway allows for management of the various mobile users and mobile devices. In addition, it allows for data synchronization between the CRM enterprise database and the Mobile application. The gateway also maintains performance statistics and error handling features. In addition to data synchronization, the application can also be published on the device using the Mobile Device Gateway. The Mobile Device Gateway allows the automatic distribution of the mobile application and schema changes.

For more information on the Mobile Device Gateway, please refer to the *Oracle CRM Gateway for Mobile Devices Concepts and Procedures* guide.

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Overview of Functionality

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

Customer and Contact Management

Field Sales/Laptop provides salespeople with the information they need to effectively target their selling efforts. Sales representatives have access to personal contacts and key organization demographics. Contact information allows with a complete customer overview at each stage of the sales process, in both Business to

Business and Business to Consumer environments. Before contacting a customer, a sales person can review customer information including: open opportunities and an interaction history. Comprehensive customer information allows sales people to better manage their customers and to plan each customer interaction more effectively.

Opportunity Management

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

Opportunity and Product Category Forecasting

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

Tasks

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

Calendar

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

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About Navigating Through Field Sales/Laptop

The Field Sales ⁄ Laptop application is organized by the following major tabs:

- Home

- Calendar

- Opportunity

- Forecast

- Customer

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

Item	How it works
Tab	Main tabs help you to navigate to further features contained within the tab.
Subtab	Subtabs will take you to further details about the main tab.
Link or Hyperlink	Third level navigation links are used to take you to another level of detail.
Asterisks	Fields marked with an asterisk are mandatory to perform that particular function.
Star	New items on a summary table are marked with a star.
Lock icon	If you see a Lock icon next to an item in a summary table, it means that you do not have access to change or update the information for that item.
	Exception: You can Create or Update Notes within a Locked Opportunity, Organization or Person record.
Quick Find	Select an item and enter a full or partial search string, using % as a wildcard. Click **Go**.
Advanced Search	Click the Advanced Search link and enter search filters.

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Using Oracle Field Sales/Laptop

This topic group provides process-oriented, task-based procedures for using Oracle Field Sales/Laptop to perform essential business tasks.

- Logging On

- Calendar Management

- Opportunity Management

- Forecast Management

- Customer Management (Organizations and People)

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Logging On

Prerequisites

You must have properly installed Oracle Field Sales/Laptop and it's dependencies. Additionally, your internet browser must be set to accept cookies. Please check with your internet browser's online help to find instructions on how to set your browser to accept cookies.

Steps

Follow these steps to log on to Oracle Field Sales/Laptop:

1. Enter your user name.

2. Enter your password.

3. Click the **Logon** button.

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Using Your Home Page

The Oracle Field Sales/Laptop home page displays the most recent changes downloaded from the enterprise database onto the local database. This page helps you identify if a new customer or new opportunity was assigned to you. You can go directly to the details of a new record by selecting the customer or opportunity link. The home page is refreshed after each synchronization.

Icon	What it means
Star	New items on a summary table are marked with a star.
Lock icon	If you see a Lock icon next to an item in a summary table, it means that you do not have access to change or update the information for that item.
	Exception: You can Create or Update Notes within a Locked Opportunity, Organization or Person record.

Note: The first time you synchronize, the home page will not display new records. During this initial synchronization, the application treats all records as new records therefore it will not display the new records on the home page. After the initial synchronization, new or updated records are displayed normally.

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Synchronization

Oracle Field Sales/Laptop is designed to make data synchronization between the laptop and the enterprise server as transparent as possible. The synchronization architecture enables the salesperson to transfer changes quickly through a middle-tier synchronization server called the CRM Gateway for Mobile Devices.

- Synchronizing the Database or Application

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Synchronizing the Database or Application

Prerequisites

You must have properly installed Oracle Field Sales/Laptop and Mobile Device Gateway.

Steps

Follow these steps to synchronize:

1. Log on to Oracle Field Sales/Laptop.

2. Select the Sync tab.

3. Launch the application by clicking the Oracle Field Sales/Laptop icon or link.

   You will not be allowed to navigate to another page within Oracle Field Sales/Laptop until the synchronization is complete.

Note: The first time you synchronize, the home page will not display new records. During this initial synchronization, the application treats all records as new records so it will not display them on the home page. Every synchronization after the initial synchronization, new or updated records will be displayed.

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Calendar Tab

You can use the Calendar tab to manage your tasks. Within the Calendar tab there are two subtabs, Tasks and View.

From the Calendar tab you can perform the following functions:

- Create a task
- View and maintain task details
- Use calendar

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Creating a Task

Prerequisites

None

Steps

Follow these steps to create tasks:

1. Click the **Tasks** subtab to display the Tasks Summary page.

2. Click the **Create button.**

3. Select a task **Type** from the drop down list. This is a required field.

4. Enter a task **Name. This is a required field.**

5. Optionally, enter a task **Description.**

6. Select a **Priority** from the drop down list.

7. Select a **Status** from the drop down list. This is a required field.

8. Select a Category from the drop down list.

9. If the task is private, not shown to others, select the Private checkbox.

10. In the Dates section, you can specify important information about the task.

    a. Indicate the Use for Calendar by selecting the radio button that signifies if the task is planned, scheduled or actual.

    b. Select start and end dates using the Calendar icon.

    c. Select start and end times from the drop down lists.

11. In the Source section, you can specify what other items the task is related to. For example, the task is related to an appointment with another customer.

12. Click **Create.**

Note: Fields marked with an asterisk are required to create a new task.

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Viewing and Maintaining Task Details

Prerequisites

A task must exist.

Steps

Follow these steps to maintain or view task details:

1. Click the **Tasks** subtab.

2. Click the task link from the task summary page. The task summary page displays all open tasks, plus appointments for the selected date, plus tasks that do not have a date associated with them. Open tasks are defined as tasks whose status is not closed, cancelled, completed, rejected, or deleted.

3. The following fields are view only:

   ■ Type

   ■ **Name**

- Priority
- Category
- Status

4. Optionally, enter a task **Description.**

5. If the task is private, not shown to others, select the Private checkbox.

6. If you want to indicate an escalation level, select the checkbox.

7. In the Dates section, you can specify important information about the task.

    d. Change the Use for Calendar by selecting the radio button that signifies if the task is planned, scheduled or actual.

    e. Change start and end dates using the Calendar icon.

    f. Change start and end times.

8. Click **Update.**

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Managing Your Calendar

From the Calendar tab, you can manage your calendar. The following functions are performed from the View subtab:

- Create an appointment
- Maintain an appointment
- View appointment details
- Go to a date

Creating Appointments

Prerequisites

None

Steps

Follow these steps to create an appointment:

1. From the **Calendar** tab, click the **View** subtab.

2. Click **Create**.

   The Create Task page opens.

3. Select an appointment type from the drop down list. This is a required field.

4. Select the **Private** check box if you do not want the appointment to be viewed by others.

5. Enter the appointment name. This is a required field.

6. Optionally, enter a description.

7. Select the appointment priority from the drop down list. This is a required field.

8. Optionally, select a status from the drop down list.

9. Select an appointment date by clicking the calendar icon and choosing a date from the calendar. This is a required field.

10. Optionally, select appointment times from the drop down lists.

11. Optionally, select a source from the drop down list and enter the full or partial name of the related item. Click **Go**.

12. Select an item to refer to.

13. Click **Create**

Maintaining Appointments

Prerequisites

An appointment must exist.

Steps

Follow these steps to maintain and view appointments:

1. Select the Calendar view by clicking the **Daily**, **Weekly**, **Monthly, or Combination** link.

   You can select another date by clicking the Calendar icon, choosing a date, and clicking **Apply**.

2. Click the appointment link from the calendar view.

   The Task Detail page opens.

3. Edit details.

4. Click **Update**.

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Viewing Appointments

You can view appointments in the following ways:

- Daily
- Weekly
- Monthly
- Combination (Day view with Today's Tasks)

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Viewing Appointments by Day

Prerequisites

None

Steps

Follow these steps to view appointments by day:

1. From the **Calendar** tab, click the **View** subtab.

2. Click the **Daily** link.

3. To view details of any appointment or task, click the appropriate link.

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Viewing Appointments by Week

Prerequisites

None

Steps

Follow these steps to view appointments by week:

1. From the **Calendar** tab, click the **View** subtab.

2. Click the **Weekly** link.

3. To view details of any appointment or task, click the appropriate link.

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Viewing Appointments by Month

Prerequisites

None

Steps

Follow these steps to view appointments by month:

1. From the **Calendar** tab, click the **View** subtab.

2. Click the **Monthly** link.

3. To view details of any appointment or task, click the appropriate link.

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Viewing Appointments by Combination (Day with Today's Tasks)

Prerequisites

None

Steps

Follow these steps to view appointments by day with tasks:

1. From the **Calendar** tab, click the **View** subtab.

2. Click the **Combination** link.

3. To view details of any appointment or task, click the appropriate link.

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Go To a Date

Prerequisites

None

Steps

Follow these steps to go to a specific date:

1. From the **Calendar** tab, click the **View** subtab.

2. Click the Calendar icon.

3. Select the date.

4. Click **Apply**.

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Opportunity Tab

The first step in the Oracle Field Sales/Laptop sales process is a sales opportunity, also referred to as a potential sale. This process begins with the initial customer contact and ends when the sales representative makes or loses the sale.

You can perform the following functions from the opportunity tab:

- Create opportunities

- Maintain opportunities

- Search opportunities

- Create and maintain sales credits

- Create and maintain contacts

- Create and maintain notes

- Create and maintain sales teams

- Create and maintain tasks

Once opportunities are 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 credit toward sales quotas after closing a sale

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 must add other sales team members, assign sales credits, and rate the likelihood that the opportunity will succeed.

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Creating an Opportunity

Prerequisites

None

Steps

Follow these steps to create an opportunity:

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

2. **Click Create.**

    The Create Opportunity page opens.

3. Enter the full or partial name of the organization or person (customer) you want to find, click **Go**.

    The Select a Customer page opens.

4. Select a customer or address link **OR click the Back button on your browser to return to the previous page.**

5. If you do not find the customer that you are looking for, go to the **Customer > Person** subtab and click the **Create Organization** or **Create Person** button.

6. Enter an opportunity name, this value is used throughout Oracle Field Sales/Laptop to select and view opportunities.

7. Optionally, enter purchase items by selecting a Product Category and quantity.

8. Add an existing person, as a contact, by entering the last name in the Find a Person Field and click **Go**.

9. To create a note, choose the Type from the drop down list. Select the Private check box, if you want to keep the note private. Enter comments in the Text box.

10. Click **Create** to create the opportunity.

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

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Maintaining Opportunity Details

Prerequisites

An opportunity must exist.

Steps

Follow these steps to maintain opportunity details:

1. From the **Opportunity** tab you can access existing opportunities one of the following ways:

   - Using Quick Find, choose Opportunity from the drop down list. Enter a partial name, click **Go**. Select the opportunity from the list of results.

   - From the Opportunity Summary page, choose an opportunity from the list by clicking the opportunity name link.

   - From the Opportunity Summary page, click the Advanced Search link. Enter your search criteria and click Search.

   The Opportunity Detail Main page opens.

2. Add or update information, and click **Update**.

From the Opportunity Detail page, you can click a link to maintain Contacts, Notes, and Sales Team.

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Searching for an Opportunity

Prerequisites

None

Steps

Follow these steps to search for an opportunity:

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

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

   2. Enter a partial name for the opportunity, using % as a wildcard, and click **Go**.

To search using **Advanced Search**:

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

    The Opportunity Search page opens.

2. Enter search filters.

3. Click **Search**.

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Sales Credits (Opportunity)

Use this feature to distribute sales credits to sales people and partners. When you create an opportunity, 100% of each purchased item is allocated to the opportunity creator in Forecast Credits. The Sales Credits feature is comprised of Forecast Credits and Other Credits; Forecast Credits are used for forecasting and must total 100% of the purchase item line, and Other Credits can equal any amount.

- Distribute sales credits
- Add a person to receive sales credits
- Add a partner to receive sales credits

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Distributing Sales Credits (Opportunity)

Prerequisites

None

Steps

Follow these steps to distribute sales credits:

1. From the **Opportunity** tab, select the **Opportunity** subtab.

    To search using **Quick Find**:

    1. Choose Opportunity from the drop down list.

    2. Enter a partial name for the opportunity, and click **Go**.

    To search using **Advanced Search**:

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

The Opportunity Search page opens.

2. Enter search filters.

3. Click **Search**.

2. Select an opportunity by clicking the link.

The Opportunity Detail page opens.

3. From the Purchase Items table select the line to split.

4. Click the **Split** button.

5. Enter a salesperson, or enter in a partial name using % as a wildcard. Click **Go**.

6. Select a salesperson from the search results table.

The same procedure is used to choose a Partner.

7. Enter the credit amount or percentage for the salesperson and/or partner. The total percentage must equal 100% for both.

8. Click **Update**.

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Adding a Person to Receive Sales Credits (Opportunity)

Prerequisites

None

Steps

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

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

To search using **Quick Find**:

1. Choose Opportunity from the drop down list.

2. Enter a partial name for the opportunity, and click **Go**.

To search using **Advanced Search**:

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

The Opportunity Search page opens.

2. Enter search filters.

    3. Click **Search**.

2. Select an opportunity by clicking the link.

The Opportunity Detail page opens.

3. From the Purchase Items table, click the **Split** button.

4. In the Salesperson field, enter a salesperson, or enter in a partial name using % as a wildcard. Click **Go**.

5. Choose a salesperson from the search results table.

6. Enter the credit amount or percentage for the salesperson. The total percentage must equal 100% for all Salespersons and Partners.

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Adding a Partner to Receive Sales Credits (Opportunity)

Prerequisites

None

Steps

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

1. From the **Opportunity** tab, select the **Opportunity** subtab.

To search using **Quick Find**:

    1. Choose Opportunity from the drop down list.

    2. Enter a partial name for the opportunity, and click **Go**.

To search using **Advanced Search**:

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

      The Opportunity Search page opens.

    2. Enter search filters.

    3. Click **Search**.

2. Select an opportunity by clicking the link.

The Opportunity Detail page opens.

3. From the Purchase Items table, click the **Split** button.

4. Within the Partner field, enter a Partner, or enter a partial name using % as a wildcard. 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. To enter Other Credits, select a Credit Type from the drop down list, credit amount or percentage, and choose a Salesperson or Partner. Click **Update**.

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

7. To enter Other Credits, choose a credit type from the drop down list, click **Update**.

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Adding New Contacts (Opportunity)

Prerequisites

None

Steps

Follow these steps to add a new contact:

1. From the **Opportunity** tab, search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

   2. Enter a partial name for the opportunity, and click **Go**.

   To search using **Advanced Search**:

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

      The Opportunity Search page opens.

   2. Enter search filters.

   3. Click **Search**.

2. Click an opportunity link to select it.

   The Opportunity Detail page opens.

3. Click the **Contacts** link.

4. Enter a person's name, or enter in a partial name using % as a wildcard. Click **Go**.

5. Select a person from the search results table.

6. Within the Contacts table, enter new information into the blank fields.

7. Click **Update**.

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Notes (Opportunity)

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

- Create a note

- Search for and view a note

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Creating Notes (Opportunity)

Prerequisites

None

Steps

Follow these steps to create a note:

1. From the **Opportunity** tab, search for an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

   2. Enter a partial name for the opportunity, and click **Go**.

   To search using **Advanced Search**:

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

      The Opportunity Search page opens.

   2. Enter search filters.

3. Click **Search**.

2. Click an opportunity link to select it.

   The **Opportunity Detail** page opens.

3. Click the **Notes** link.

4. Select a Type from the drop down list and select the **Private** check box if you want the note to remain private.

5. Enter your notes in the Text box.

6. Click **Create.**

Note: You cannot edit notes once they are created.

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Searching and Viewing Notes (Opportunity)

Prerequisites

None

Steps

Follow these steps to view a note:

1. From the **Opportunity** tab, select an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

   2. Enter a partial name for the opportunity, and click **Go**.

   To search using **Advanced Search**:

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

      The Opportunity Search page opens.

   2. Enter search filters.

   3. Click **Search**.

2. Select an opportunity by clicking the opportunity link.

   The **Opportunity Detail** page opens.

3. Click the **Notes** link.

All notes for this organization are displayed in the Note History section.

4. To search for a specific note, select a Type from the drop down list and/or choose a date range.

5. Click **Search**.

The search results page will be displayed within the Notes History Table.

The first characters of the note are displayed in the table. Click the **Text** icon to see the entire note.

6. To view All Notes, do a search using blank selections for Type and Date Range. If there are more records than you have chosen to display, click **Next** at the bottom of the table to view more records.

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Sales Teams (Opportunity)

Sales teams represent all of the salespeople and partners that have ownership of a specific customer or opportunity. Sales team members can have full access or non-full access (view only) ownership. Unless a salesperson has an "Account Manager" role, they have access only to the records for which they are on the sales team. However, a salesperson can be part of a sales team in more than one way. For example, a sales person can have a manager role and salesperson role for the same customer or opportunity.

- Add a sales team member

- Add a partner to a sales team

- Remove a sales team member

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Adding a Sales Team Member (Opportunity)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

1. From the **Opportunity** tab, select an opportunity:

To search using **Quick Find**:

1. Choose Opportunity from the drop down list.

2. Enter a partial name for the opportunity, and click **Go**.

To search using **Advanced Search**:

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

    The Opportunity Search page opens.

2. Enter search filters.

3. Click **Search**.

2. Choose an opportunity by clicking the opportunity link.

    The **Opportunity Detail** page opens.

3. Click the Sales Team link.

4. In the Add a Salesperson field, enter the last name or partial name, using % as a wildcard. Click **Go**.

5. Within the Select an Employee table, click the salesperson link of the Salesperson you want to add.

6. Enter the applicable information.

7. Click **Update**.

Adding a Partner to a Sales Team (Opportunity)

Prerequisites

None

Steps

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

1. From the **Opportunity** tab, choose an opportunity by:

    To search using **Quick Find**:

    1. Choose Opportunity from the drop down list.

    2. Enter a partial name for the opportunity, and click **Go**.

To search using **Advanced Search**:

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

   The Opportunity Search page opens.

2. Enter search filters.

3. Click **Search**.

2. Select an opportunity by clicking the opportunity link.

   The Opportunity Detail page opens.

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

4. In the Add a Partner field, enter the last name or partial name of the partner using the % as a wildcard. Click **Go.**

   It is recommended that you search by last name only.

5. Choose a partner from the Partner Search Results table.

6. Click **Update.**

You can choose only from a list of partners whose organizations are specifically defined as a "sales" partner. Refer to the *Partner Relationship Management (also referred to as Partners Online) Concepts and Procedures Guide* for more detailed information.

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Removing Sales Team Members (Opportunity)

Prerequisites

The sales team member must exist on the sales team.

Steps

Follow these steps to remove a sales team member:

1. From the **Opportunity** tab, choose an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

   2. Enter a partial name for the opportunity, and click **Go**.

   To search using **Advanced Search**:

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

The Opportunity Search page opens.

2. Enter search filters.

3. Click **Search**.

2. Select an opportunity by clicking the opportunity link.

The **Opportunity Detail** page opens.

3. Find the salesperson on the table and select the Remove check box.

4. Click **Update.**

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Tasks (Opportunity)

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

- Create a task

- Maintain task details

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Creating a Task (Opportunity)

Prerequisites

None

Steps

Follow these steps to create a task:

1. From the **Opportunity** tab, choose an opportunity:

To search using **Quick Find**:

1. Choose Opportunity from the drop down list.

2. Enter a partial name for the opportunity, and click **Go**.

To search using **Advanced Search**:

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

       The Opportunity Search page opens.

    2.   Enter search filters.

    3.   Click **Search**.

2.   Select an opportunity by clicking the opportunity link.

     The **Opportunity Detail** page opens.

3.   Click the **Tasks** link.

4.   Click **Create**.

5.   Select a task **Type** from the drop down list. This is a required field.

6.   Enter a task **Name. This is a required field.**

7.   Optionally, enter a task **Description.**

8.   Select a **Priority** from the drop down list.

9.   Select a **Status** from the drop down list. This is a required field.

10. Select a Category from the drop down list.

11. If the task is private, not shown to others, select the Private checkbox.

12. In the Dates section, you can specify important information about the task.

    g.   Indicate the Use for Calendar by selecting the radio button that signifies if the task is planned, scheduled or actual.

    h.   Select start and end dates using the Calendar icon.

    i.   Select start and end times from the drop down lists.

13. In the Source section, you can specify what other items the task is related to. For example, the task is related to an appointment with another customer.

14. Click **Create.**

Note: Fields marked with an asterisk are required to create a new task.

When the Task Detail page opens, you have successfully created a task. You can update information from this page.

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Maintaining Task Details (Opportunity)

Prerequisites

The task must exist.

Steps

Follow these steps to maintain task details:

1. From the **Opportunity** tab, choose an opportunity:

   To search using **Quick Find**:

   1. Choose Opportunity from the drop down list.

   2. Enter a partial name for the opportunity, and click **Go**.

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

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

      The Opportunity Search page opens.

   2. Enter search filters.

   3. Click **Search**.

2. Select an opportunity by clicking the opportunity link.

   The **Opportunity Detail** page opens.

3. The following fields are view only:

   - Type
   - **Name**
   - Priority
   - Category
   - Status

4. Optionally, enter a task **Description.**

5. If the task is private, not shown to others, select the Private checkbox.

6. In the Dates section, you can specify important information about the task.

   a. Change the Use for Calendar by selecting the radio button that signifies if the task is planned, scheduled or actual.

   b. Change start and end dates using the Calendar icon.

    c. Change start and end times.

7. Click **Update.**

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Forecast Tab

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. You can forecast at two levels:

- **Product Category**

  Forecasting at the Product Category level provides salespeople with an easy way to forecast their sales at the product level by rolling up opportunity lines into product groupings.

- **Opportunity**

  Forecasting at the Opportunity level provides a tool for salespeople to create their own view and commitment of the opportunities that they or their sales representatives are working on. At this level, a manager can review, adjust, and commit to the numbers used in forecasting at the opportunity level.

Perform the following functions from the Forecast tab:

- Create and submit forecasts

- View forecast history

- Create product category worksheets

- Create opportunity level worksheets

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Creating and Submitting Forecasts

Prerequisites

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

Please note, actual submission of the forecast occurs when you synchronize. Your last submitted forecast will be contain your submitted forecast values.

Steps

Follow these steps to create and submit Forecasts:

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

2. Select the your sales group from the drop down list. If you work in multiple groups, you must submit multiple forecasts; one per group.

3. Select the **Period Type** and **Period Name** from the drop down lists.

4. Choose the **Forecast Category** from the drop down list.

5. The Forecast Category is a grouping of product categories for which you want to forecast.

6. Click **Apply**.

   Note: Your forecast currency is displayed. To change the forecast currency, go to the Profiles icon, select the Forecasting link.

7. Update Worst Case, Forecast, and Best Case with the amounts that you want to submit to management and click **Submit Forecast and Worksheets**.

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Viewing Forecast History

The Forecast History shows you a list of all previously submitted forecasts for a period. Please note, you can view forecast history after forecasts are saved AND submitted. If you save a forecast without submitting the forecast, you cannot view it within the forecast history.

Prerequisites

Submitted forecasts must exist.

Steps

Follow these steps to view forecast history:

1. From the **Forecast** tab, click the **Forecast History link**.

   The **Forecast History** page opens.

2. You can click the **Opportunity** or **Product Category Worksheet** link to view either worksheet.

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Opportunity Worksheet

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

■ Create an opportunity level forecast

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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 without having to go down to the opportunity level.

■ Create a product category level forecast

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Creating Opportunity Level Forecasts Using Opportunity Worksheets

Prerequisites

None

Steps

Follow these steps to create opportunity worksheets:

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

   The **Opportunity Worksheet** page opens.

2. From the drop down list select the **Sales Group**, for which you want to forecast.

3. Select the **Period Type** and **Period Name** from the drop down lists.

4. Select the Forecast Category from the drop down list.

5. From the "**Create Worksheet Using**" radio buttons, select one of the following options:

   Previously Saved Values (default): If you are forecasting for the first time, the value is based on the 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 and status of opportunity equal to Won; then the Worst case, Forecast, and Best case amounts are all defaulted to the Opportunity amount.

Pipeline defaults use the following criteria:

Worst Case: Total Won Amount=Sum of all won opportunities

Forecast: Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability

Best Case: Total sum of all forecastable opportunities

Subordinate Submitted Values: This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.

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. Save the worksheet by clicking the **Save** button. The forecast will not be submitted by saving the worksheet, you must click the **Submit Forecast and Worksheets** button on the Forecast main page.

Please note, actual submission of the forecast occurs when you synchronize. Your last submitted forecast will be contain your submitted forecast values.

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Creating Product Level Forecasts Using Product Category Worksheets

Prerequisites

None

Steps

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

1. From the **Forecast** tab, click the **Product Category** subtab.

   The **Product Category Worksheet** page opens.

2. From the drop down list select the **Sales Group**, for which you want to forecast.

3. Select the **Period Type** and **Period Name** from the drop down lists.

4. Select the Forecast Category from the drop down list.

5. From the **Create Worksheet Using** radio buttons, select one of the following options:

   Previously Saved Values (default): If you are forecasting for the first time, the value is based on the 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.

   Pipeline defaults use the following criteria:

   Worst Case: Total Won Amount=Sum of all won opportunities

   Forecast: Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability

   Best Case: Total sum of all open opportunities

   Subordinate Submitted Values: This includes values submitted by subordinates. If there are no subordinate submitted values, the default of previously saved values will be used.

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. Save the worksheet by clicking the **Save** button. The forecast will not be submitted by saving the worksheet, you must click the Submit button.

Please note, actual submission of the forecast occurs when you synchronize. Your last submitted forecast will be contain your submitted forecast values.

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Customer Tab

The Customer tab is comprised of two subtabs, Organization and Person. Within the tabs, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be equally supported. See Understanding Trading Community Architecture" for more information.

By default, the Customer tab opens to the Organization page. Click the Person subtab to open the Person page.

Use the Customer tab to create and maintain the following:

- Organizations
- People

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Organization Subtab

Within the Customer tab you will find Organization and Person subtabs. The Organization subtab will help you perform the tasks outlined in the following section.

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

- Create organizations
- Maintain organization details
- Search organizations
- Create and maintain relationships
- Create and maintain opportunities
- Create and maintain notes
- Create and maintain sales team members
- Create and maintain tasks

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Creating a New Organization

Prerequisites

None

Steps

Follow these steps to create a new organization:

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

2. From the Organization Summary page, click the **Create** button.

3. Enter the required information and other important information.

    ■   Address is a required field. You may choose multiple address types if the specific address may serve as the bill to and the ship to address.

    ■   If you want to enter person relationships, you can add an existing person by entering the last name in the Add a Person field and clicking **Go**.

    ■   If you want to enter organization relationships, you must add an existing organization by entering the partial organization name in the Add an Organization field and clicking **Go**. You cannot create a new organization on this page.

4. After you have completed entering the information, scroll to the bottom of the page, click **Create**.

5. You have successfully created an organization when the Organization Main Detail page opens. The organization number is generated after you synchronize the database.

Note: The address you enter on this page becomes the primary address by default.

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Maintaining Organization Details

Prerequisites

None

Steps

Follow these steps to edit an existing organization:

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

To search using **Quick Find**:

1. Choose Organization from the drop down list.

2. Enter a partial name of the organization, and click **Go**.

To search using **Advanced Search**:

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

    The Organization Search page opens.

2. Enter search filters.

3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the organization for which you are searching.

2. The page updates, displaying the matching records.

2. To select an organization, click the organization's link.

    The **Organization Detail** page opens.

3. Add or edit information.

4. Before editing or adding address information, click **Update** to save your current changes.

5. Add or edit address.

    By default the address entered on the Create Organization page is the primary address. You can edit addresses by clicking the address link.

    To create a new address, click the Create Address button. Up to four new address lines can be created on the Create Address page.

6. Click **OK** to return to the Organization Detail Main page.

7. Click **Update.**

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Searching for an Organization

Prerequisites

None

Steps

Follow these steps to search for an organization:

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

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

    To search using **Quick Find**:

    1. Choose Organization from the drop down list.

    2. Enter the full or partial name for the organization.

    3. Click **Go.**

    To search using **Advanced Search**:

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

        The Organization Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the organization name for which you are searching.

    2. The page updates, displaying the matching records.

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Creating and Maintaining Relationships

There are two types of relationships you can create from the Organization subtab, Organization to Organization and Person to Organization. Please refer to the Person subtab section for information about creating Person to Organization and Person to Person relationships.

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Creating an Organization to Organization Relationship

Prerequisites

None

Steps

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

1. From the **Customer** tab, search for an organization:

    To search for an organization using **Quick Find**:

    1. Choose Organization from the drop down list.

    2. Enter a partial name of the organization, using % as a wildcard,

    3. Click **Go**.

    To search using **Advanced Search**:

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

        The Organization Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the organization for which you are searching.

    2. The page updates, displaying the matching records.

2. Click the organization with which you want to create a relationship from the search results page. The organization will populate the related organization field, a required field, on the relationship detail page.

3. Click the **Relationships** link.

4. In the **Add an Organization** field, enter the name, or partial name.

5. Click **Go**.

6. From the Search Results page, click the organization link to select the organization.

7. Choose a **Relationship** from the drop down list.

8. Select a start date. This is a required field.

9. Click **Update.**

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Creating a Person to Organization Relationship

Prerequisites

None

Steps

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

1. From the **Customer** tab, search for an organization.

    To search using **Quick Find**:

    1. Choose Organization from the drop down list.

    2. Enter a partial name of the organization, using % as a wildcard.

    3. Click **Go**.

    To search using **Advanced Search**:

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

        The Organization Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the organization for which you are searching.

    2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

    The **Organization Detail** page opens.

3. Click the **Relationships** link.

4. In the **Add a Person** field, enter the name, or partial name.

5. Click **Go.**

6. Choose from the list of people.

7. Choose a **Relationship** from the drop down list.

8. Select a Start Date. This is a required field.

9. Click **Update.**

Creating and Maintaining Opportunities

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

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

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

    To search using **Quick Find**:

    1. Choose Organization from the drop down list.

    2. Enter a partial name of the organization, and click **Go**.

    To search using **Advanced Search**:

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

        The Organization Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the organization for which you are searching.

    2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

    The **Organization Detail** page opens.

3. Click the **Opportunities** link.

    You will see a summary of all opportunities for the specific organization.

    You can edit information regarding Sales Stage, Win Probability, Status, and Close Date, by changing the display options within the Opportunity Table. The amount can only be changed from the Opportunity Detail page.

4. **Click the Create button to create a new opportunity.**

   The organization name will default to the name of the organization that you have created or the organization for which you are viewing the details.

5. Enter a different customer name from the default name, Opportunity Description, Status, and Channel. Additionally, enter any other information that applies.

6. Click **Create**.

   The Opportunity Detail page opens.

7. Optionally, enter additional information on the Opportunity Detail page or click the link to return to the organization detail.

   The opportunity that you have created will appear in the opportunity summary table.

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Notes (Organization)

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

- Create a note

- View a note

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Creating a Note (Organization)

Prerequisites

None

Steps

Follow these steps to create a note:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

2. Enter a partial name of the organization, and click **Go**.

To search using **Advanced Search**:

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

   The Organization Search page opens.

2. Enter search filters.

3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the organization for which you are searching.

2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.

3. Click the **Notes** link.

4. Select a Type from the drop down list.

5. Enter your notes in the text box.

6. Click **Create.**

Note: You cannot edit notes once they are created.

Viewing a Note (Organization)

Prerequisites

None

Steps

Follow these steps to view a note:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

   2. Enter a partial name of the organization, and click **Go**.

To search using **Advanced Search**:

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

   The Organization Search page opens.

2. Enter search filters.

3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the organization for which you are searching.

2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.

3. Click the **Notes** link.

4. Select a Type from the drop down list.

5. Choose the date range 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.

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

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

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Sales Teams (Organization)

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

- Add a sales team member

- Add a partner to a sales team

■ Remove a sales team member

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Adding Sales Team Members (Organization)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

   2. Enter a partial name of the organization, and click **Go**.

   To search using **Advanced Search**:

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

      The Organization Search page opens.

   2. Enter search filters.

   3. Click **Search**.

   To search using the Alpha bar:

   1. Click the letter or number corresponding to the organization for which you are searching.

   2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

   The Organization Detail page opens.

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

4. Enter the last name of the sales representative in the Add a Salesperson field.

5. Click **Go.**

6. Choose from the company drop down list, click **Go.**

7. Click the salesperson link, and click **Update**.

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Adding Partners to Sales Teams (Organization)

Prerequisites

None

Steps

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

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

    To search using **Quick Find**:

    1. Choose Organization from the drop down list.

    2. Enter a partial name of the organization, and click **Go**.

    To search using **Advanced Search**:

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

        The Organization Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the organization for which you are searching.

    2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

    The Organization Detail page opens.

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

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

    It is recommended that you search by last name only.

5. Select the partner from the search results list, and click **Update**.

Choose from the list of partners whose organizations are defined as a "sales" partner.

Removing Sales Team Members (Organization)

Prerequisites

None

Steps

Follow these steps to remove a sales team member:

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

   To search using **Quick Find**:

   1. Choose Organization from the drop down list.

   2. Enter a partial name of the organization, and click **Go**.

   To search using **Advanced Search**:

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

      The Organization Search page opens.

   2. Enter search filters.

   3. Click **Search**.

   To search using the Alpha bar:

   1. Click the letter or number corresponding to the organization for which you are searching.

   2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

   The **Organization Detail** page opens.

3. Click the Sales Team link.

4. Locate the salesperson that you want to remove from the sales team.

5. Select the **Remove** check box.

6. Click **Update.**

Tasks (Organization)

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

- Create a task

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Creating a Task (Organization)

Prerequisites

None

Steps

Follow these steps to create a task:

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

    To search using **Quick Find**:

    1. Choose Organization from the drop down list.

    2. Enter a partial name of the organization, and click **Go**.

    To search using **Advanced Search**:

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

        The Organization Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the organization for which you are searching.

    2. The page updates, displaying the matching records.

2. Select an organization by clicking the organization link.

    The **Organization Detail** page opens.

3. Click the **Tasks** link.

4. Click **Create**.

   The Create Task page opens.

5. Select Task Type from the drop down list.

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 a Due Date by clicking the calendar icon.

11. When you create a task, it is automatically assigned to the task creator.

12. 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.

13. Click **Create.**

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

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Person Subtab

Within the Customer tab you will find the Person subtab. The Person subtab helps you to perform the tasks outlined below.

The following tasks can be performed from the Person subtab:

- Create a person

- Maintain person details

- Search for a person

- Create and maintain relationships

- Create and maintain opportunities

- Create and maintain notes

- Create and maintain sales teams

- Create and maintain tasks

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Creating a Person

Prerequisites

None

Steps

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

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

2. Click **Create.**

3. Enter business information, personal information, and notes.

   An asterisk indicates a required field.

4. Click **Create**.

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Maintaining Person Details

Prerequisites

The person must exist.

Steps

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

1. From the **Customer** tab, select the **Person** subtab:

   To search using **Quick Find**:

   1. Choose Person from the drop down list.

   2. Enter the partial name of the person, and click **Go**.

   To search using **Advanced Search**:

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

      The People Search page opens.

2. Enter search filters.

3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the person for which you are searching.

2. The page updates, displaying the matching records.

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

The **Person Detail** page opens.

3. Add or edit information.

4. Optionally, enter phone number and e-mail address.

5. Click **Update**.

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Searching for a Person

Prerequisites

None

Steps

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

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

To search using **Quick Find**:

1. Choose Person from the drop down list.

2. Enter the partial name of the person, and click **Go**.

To search using **Advanced Search**:

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

The People Search page opens.

2. Enter search filters.

3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the person for which you are searching.

2. The page updates, displaying the matching records.

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Creating and Maintaining Relationships (Person)

From the Person subtab, you can create two types of relationships; Person to Organization and Person to Person. Each relationship is created by clicking the Relationship link from the Person subtab.

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Creating a Person to Organization Relationship

Prerequisites

None

Steps

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

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

   The People page opens.

2. Search for a person by selecting Person from the Quick Find drop down list, entering the full or partial name of the person in the Quick Find field, and clicking **Go**. You can also use the Alpha bar (A...Z) filter to search for a person.

3. Select from the Search Results by clicking the person's link.

4. From the Person Detail page, click the **Relationships** link.

To add an organization from the Organization Detail page, follow these steps:

1. From the Person to Organization Relationships section, in the **Add an Organization** field, enter the name, or partial name and click **Go**.

   The Select an Organization page opens.

2. Choose an organization from the list of search results.

3. Choose a **Relationship Type** from the drop down list and select the check box for Decision Maker and Reference, if applicable.

4. Click **Update.**

Note: To remove a relationship, select the **Remove** check box. Click **Update**.

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Creating a Person to Person Relationship

Prerequisites

None

Steps

Follow these steps to create a person to person relationship:

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

   The People page opens.

2. Search for a person by selecting Person from the drop down list, entering the full or partial name of the person in the Quick Find field, and clicking **Go**. You can also use the Alpha bar (A...Z) filter to search for a person.

3. Select from the search results page by clicking the person's link.

4. From the Person Detail page, click the Relationship link.

To add a person from the Person Detail page, follow these steps:

1. In the Person to Person Relationship section, in the **Add a Person** field, enter the name, or partial name and click **Go**.

2. Choose a person from the list of search results.

   The person information will default into the table.

3. Select relationship type from the drop down list, and start and end dates, if applicable.

4. Click **Update.**

Note: To remove a relationship, select the **Remove** check box. Click **Update**.

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Creating and Maintaining Opportunities (Person)

Prerequisites

None

Steps

Follow these steps to create a new opportunity:

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

    To search using **Quick Find**:

    1. Choose Person from the drop down list.

    2. Enter the partial name of the person, and click **Go**.

    To search using **Advanced Search**:

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

        The People Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the person for which you are searching.

    2. The page updates, displaying the matching records.

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

    The **Person Detail** page opens.

3. Click the **Opportunities** link.

4. Click the **Create** button to display the Create Opportunity page.

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Notes (Person)

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

- Create a note

- View a note

Creating a Note (Person)

Prerequisites

None

Steps

Follow these steps to create a note:

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

    To search using **Quick Find**:

    1. Choose Person from the drop down list.

    2. Enter the partial name of the person, and click **Go**.

    To search using **Advanced Search**:

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

        The People Search page opens.

    2. Enter search filters.

    3. Click **Search** button.

    To search using the Alpha bar:

    1. Click the letter or number corresponding to the person for which you are searching.

    2. The page updates, displaying the matching records.

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

    The **Person Detail** page opens.

3. Click the **Notes** link.

4. Select a Type from the drop down list.

5. Optionally, select the box labeled Private if you do not want your sales team members to view this note.

6. Enter your notes in the text box, and click **Create**.

Note: You cannot edit notes once they are created.

Viewing a Note (Person)

Prerequisites

None

Steps

Follow these steps to view a note:

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

   To search using **Quick Find**:

   1. Choose Person from the drop down list.

   2. Enter the partial name of the person, and click **Go**.

   To search using **Advanced Search**:

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

      The People Search page opens.

   2. Enter search filters.

   3. Click **Search**.

   To search using the Alpha bar:

   1. Click the letter or number corresponding to the person for which you are searching.

   2. The page updates, displaying the matching records.

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

   The **Person Detail** page opens.

3. Click the **Notes** link.

4. Select a Type from the drop down list.

5. Choose the date range 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.

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

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Sales Teams (Person)

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

- Add a sales team member

- Add a partner to a sales team

- Remove a sales team member

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Adding a Sales Team Member (Person)

Prerequisites

None

Steps

Follow these steps to add a sales team member:

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

    To search using **Quick Find**:

    1. Choose Person from the drop down list.

    2. Enter the partial name of the person, and click **Go**.

    To search using **Advanced Search**:

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

        The People Search page opens.

    2. Enter search filters.

    3. Click **Search**.

    To search using the Alpha bar:

1. Click the letter or number corresponding to the person for which you are searching.

2. The page updates, displaying the matching records.

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

   The **Person Detail** page opens.

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

4. In the Add a Salesperson field, enter the last name or partial name using % as a wildcard.

5. Click **Go.**

6. From the Select an Employee table, click the link of the salesperson that you want to add.

7. Enter applicable information.

8. Click **Update.**

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Adding a Partner to a Sales Team (Person)

Prerequisites

None

Steps

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

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

   To search using **Quick Find**:

   1. Choose Person from the drop down list.

   2. Enter the partial name of the person, and click **Go**.

   To search using **Advanced Search**:

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

      The People Search page opens.

   2. Enter search filters.

   3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the person for which you are searching.

2. The page updates, displaying the matching records.

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

    The **Person Detail** page opens.

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

4. In the Add a Partner field, enter the partner's last name or partial name using % as a wildcard. Click **Go.**

    It is recommended that you search by last name only.

5. Choose a partner from the Partner search results table.

6. Click **Update.**

Choose from a list of partners whose organizations are defined as a "sales" partner.

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Removing a Sales Team Member (Person)

Prerequisites

None

Steps

Follow these steps to remove a sales team member:

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

    To search using **Quick Find**:

    1. Choose Person from the drop down list.

    2. Enter the partial name of the person, and click **Go**.

    To search using **Advanced Search**:

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

        The People Search page opens.

    2. Enter search filters.

   3. Click **Search**.

   To search using the Alpha bar:

   1. Click the letter or number corresponding to the person for which you are searching.

   2. The page updates, displaying the matching records.

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

   The **Person Detail** page opens.

3. Locate the sales person that you want to remove from the sales team.

4. Select the **Remove** check box.

5. Click **Update.**

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Tasks (Person)

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

   ■   Create a task

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Creating a Task (Person)

Prerequisites

None

Steps

Follow these steps to create a task:

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

   To search using **Quick Find**:

   1. Choose Person from the drop down list.

   2. Enter the partial name of the person, and click **Go**.

To search using **Advanced Search**:

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

   The People Search page opens.

2. Enter search filters.

3. Click **Search**.

To search using the Alpha bar:

1. Click the letter or number corresponding to the person for which you are searching.

2. The page updates, displaying the matching records.

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

   The **Person Detail** page opens.

3. Click the **Tasks** link.

4. Click **Create**.

5. Select Task Type from the drop down list.

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 a Due Date by clicking the calendar icon.

11. When you create a task, it is automatically assigned to the task creator.

12. Optionally, select the opportunity, organization, or person you want to relate the task to, click **Go.**

13. Click **Create.**

When the Task Detail page opens, you have successfully created a task. You can edit information from this page.

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Mobile Tab

Oracle Sales Online (OSO) has a Mobile tab that you use to interface with the Field Sales/Laptop application. This tab enables you to selectively download organizations or persons to your laptop computer. Downloading organizations or persons is a twofold process. First, you login to OSO and specify what you want to download and then you login to Field Sales/Laptop to accept the download.

Complete the following steps to download organizations or persons to your laptop computer:

1. Login to OSO.

2. Select the Mobile tab.

3. Select the Organization subtab.

   You may use any of your saved queries to display organizations.

4. Use the columns on the left to select or deselect the organizations you want to download.

   Optionally, click **Select All** to select all organizations or **Deselect All** to deselect all organizations.

5. Click **Update**.

   OSO saves your selections.

6. Logon to Field Sales/Laptop and click **Sync**.

   The organizations you selected in OSO are downloaded on your laptop.

7. Repeat this procedure, clicking the Persons subtab instead of the Organization subtab, to download persons.