Oracle® Sales Online

Implementation Guide

Release 11*i*

Part No. B10565-02

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Oracle Sales Online Implementation Guide, Release 11*i*

Part No. B10565-02

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Oracle Sales Online Implementation Guide, Release 11*i*

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us at:

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Oracle Sales Online Documentation
500 Oracle Parkway
Redwood Shores, CA 94065, USA

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

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

Preface

Intended Audience

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

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

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

  If you have never used Oracle Sales Online, Oracle suggests you attend one or more of the Oracle Sales Online training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

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

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

How To Use This Guide

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

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

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

This guide includes the following chapters and appendixes:

- Chapter 1, the Introduction, includes an overview of the entire sales family of Oracle CRM applications as well as a separate overview of each of the products.
- Chapter 2, "Before You Begin," outlines the technologies and dependencies for the Oracle sales family of eBusiness Suite products and provides you with a list of technologies required to implement these products. Additionally, this chapter lists hardware and software requirements where applicable.
- Chapter 3, "Implementation Overview," includes a checklist of the steps required to implement each of the sales applications individually. You can use this chapter as a starting point for your implementation.
- Chapter 4,"Implementing Oracle Sales Applications," consists of the steps that are common for all the sales applications as well as the steps for Oracle Sales Online. The steps in this chapter follow the same order as the implementation guide checklists in the previous chapter. Not all steps are required for each application. Each step lists the applications that require that step.
- Chapter 5, "Implementation Tasks for Oracle TeleSales," provides the steps for the additional tasks required for implementintg Oracle TeleSales.
- Chapter6, "Verifying the Implementation," is intended to give you tasks to perform to make sure that the application was installed properly.
- Appendix A, "System Profile Options," includes a table of all of the relevant system profile options for the steps in this guide. Some of these profile options are also listed in the step where you set them, but some appear only in this table.
- Appendix B, "Concurrent Programs," lists the concurrent programs used by the three sales applications.
- Appendix C, "Lookups," lists the lookups for all three applications.
- Appendix D, "Implementing Oracle Sales Offline Edition," provides information about how to implement Oracle Sales Offline Edition.

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

If you are implementing a single application, you can use the appropriate checklist in Chapter 3, "Implementation Overview", as your starting point.

You can also go step-by-step through the procedures in Chapter s 4 and 5, skipping the steps that do not apply to your product.

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

About User Interfaces (HTML and Forms)

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

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

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

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

How This Guide Represents Navigation

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

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

For example:

Forms Navigation:

HRMS Setup > Organization

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

The HTML navigation path is composed of the following:

Tab > Subtab > Side Navigation Panel Heading > Link

For example:

HTML Navigation

Administration > Sales > Call Center > Campaign Assignment

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

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

For example:

Forms Navigation

Administration > Administration

HTML Navigation

Administration > Sales > Call Center > Campaign Assignment

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

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Sales Online.

If this guide refers you to other Oracle Applications documentation, use only the Release 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 at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Sales Online (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

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

Installing Oracle Applications, Release 11i

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

Oracle Applications Concepts

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications Product Update Notes, Release 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 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 Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

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.

Oracle Incentive Compensation Implementation Guide

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

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Sales Online and Oracle TeleSales and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization’s structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle 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 email alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use Oracle*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

Getting Started

This section of the contains the following chapters:

1

Introduction

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

1.1 Oracle Sales Family Overview

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

The Oracle sales family of applications includes:

- Sales Online
- TeleSales
- Incentive Compensation

- Partners Online
- Sales Intelligence

1.2 Oracle Sales Online Overview

Sales Online includes the following functionality:

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

Customer and Contact Management

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

Opportunity Management

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

Opportunity and Product Category Forecasting

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

Table 1–1, "Forecasting Levels in SalesOnline" details the forecasting levels available in Sales Online:

Table 1–1 Forecasting Levels in SalesOnline

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

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

Notes, Tasks, and Attachments

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

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

Interactions

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

Partners

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

Incentive Compensation

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

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

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

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

Collateral Fulfillment

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

Marketing Encyclopedia System

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

1.2.1 New in this Release

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 TeleSales.

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

- Flexible Security
- Opportunity Aging Report
- Opportunity Aging By Status Report

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.

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 now able to validate the address as governed by a profile option. Validation rules are set up in tax locations, provided by Oracle Accounts Receivables application.

Flexible Security

Flexible 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.

Opportunity Aging Report

This report allows sales representatives, sales managers, and sales executives to view a list of opportunities and to compare the aging trends of those opportunities. You can view opportunity days since creation, days past close and days until close. Additionally, users can select columns to display and sort on, or download the report to a spreadsheet.

Opportunity Aging By Status Report

This report allows sales representatives, sales managers, and sales executives to view a list of opportunities and compare aging trends by status. The report displays the number of days in each opportunity status which allows users to copare the progression of opportunities according to input criteria. Additionally, users can select columns to display and sort on, or download the report to a spreadsheet.

1.2.2 Obsolete in this Release

The following profiles in Oracle Sales Online are obsolete:

- OSO: Store Opportunities After Aggregation Due to Forecast Threshold
- 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: Territory Minimum Number of Records for Parallel Processing
- OS: Territory Number of Child Processes
- OS: Territory Records to Open for Processing Changed Accounts
- OSO: Max Attachment Size

The following concurrent programs are obsolete:

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

1.3 Oracle TeleSales Overview

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

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

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

1.3.1 New in This Release

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

- Section 1.3.2, "Contact Management Enhancements"
- Section 1.3.3, "CTI and Interaction Tracking Enhancements"
- Section 1.3.4, "Opportunity Enhancements"
- Section 1.3.5, "Universal Search Enhancements"
- Section 1.3.6, "Collateral Fulfillment Enhancement"
- Section 1.3.7, "Quick Entry of Orders"
- Section 1.3.8, "Universal Work Queue Enhancements"

1.3.2 Contact Management Enhancements

Contact Interest

You can keep track of the product interests associated with a particular contact. Users will now have the ability to record a professed interest in a particular product for their contacts.

Contact At A Glance Window

In this release a call center agent will have the ability to quickly view "at a glance" all activities related to the contact. At A Glance is a new feature that shows the summation and details of the individual business object all in one single view. Business objects include contact, person, and organization interest, lead, opportunity, quote, order, task, and notes. An agent can quickly prepare for a call with minimized clicks thus reducing the overall call time.

1.3.3 CTI and Interaction Tracking Enhancements

Direct Phone Dialing

New in this release is the ability to dial the phone number directly from the eBusiness Center. This feature leverages the CTI functionality. The phone number is hyperlinked in the eBusiness Center header and in the Address/Phone tab. By double-clicking the phone number the application automatically dials the number. This feature reduces the agent's need to manually dial the phone number using the Soft Phone.

Multiple Interaction Tracking

In this release the application supports simultaneous multiple interactions. An agent in a high volume contact center may require to handle multiple calls simultaneously, and to work in both media and non-media modes. For example, an agentcan accept a transferred call while on another call with a customer, and independent interactions and activities are simultaneously recorded against the customer record they are actively working with. This feature also records the active duration (the amount of time the agent is working with a particular customer) of a particular interaction.

This feature significantly increases the productivity of agents because they are no longer restricted to interacting with one customer at a time.

Enhanced call Wrap up

The call wrap up process is enhanced with the ability to enter notes for the interactions thus allowing the agent in their own words to describe the result of the call. Included as part of this enhancement is the ability to create follow-up actions such as scheduled callbacks and creation of tasks.

1.3.4 Opportunity Enhancements

Opportunity History

In the current release the application provides the ability to view the audit trail of opportunity updates over life cycle of the opportunity. In addition to this the application provides trending and reporting of this audit trail. The following new reports are available:

- **Opportunity Aging Report:** The Opportunity Aging 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:** The Opportunity Aging by Status Report provides sales representatives and sales managers 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.

Copy Opportunity

In this release when an opportunity is copied you can change the name of the opportunity before the copy is made. A new Opportunity Name field is introduced in the Opportunity Copy window.

Opportunity Owner

This release introduces the opportunity owner. One member of the opportunity sales team can be denoted as an opportunity owner. By default, the creator of the opportunity is designated as the owner. After the owner has been set only the owner can reassign the ownership to some other sales rep. The opportunity owner is available for reporting purposes. If territory assignment is implemented, then the opportunity owner is assigned. One person within the territory is assigned as the opportunity owner.

This functionality provides the ability to nominate one person on the sales team as the owner of the opportunity.

1.3.5 Universal Search Enhancements

Search Using Global Address and Customer Key

New in this release is the ability to search using the global address format and the customer key. Global address search allows users to search using the address field specifically designated for a particular country.

Customer Key search allows users to search using a unique identfier. Eligible identifiers are Phone Number, Email, Account, Tax ID, Party External System Reference Number, Install Base Serial Number, Install Base System Number, and Install Base External System Number.

1.3.6 Collateral Fulfillment Enhancement

Beginning with this release, in addition to mail and e-mail fulfillment of collateral, you can fax and print collateral.

1.3.7 Quick Entry of Orders

New in this release is the addition of the Order tab to the eBusiness Center. You can view historical orders placed, view or update existing order detail, and enter new orders directly via Oracle Order Management. For short sales cycles where users enter orders directly, this new integration significantly enhances the agent's ability to quickly close the cycle.

1.3.8 Universal Work Queue Enhancements

Take Action on Work Items Capability

In this release users can update and perform actions on work items directly in the Universal Work Queue. User can update individual items one at a time or perform mass updates directly on the work queue. In addition, users can take actions on the work item, for example create a task while working on an opportunity record.

1.3.9 Obsolete in This Release

This section covers what is now obsolete in Oracle TeleSales.

Profile Options

The following profile in Oracle TeleSales is obsolete:

- OTS: Enable Address Validation

2

Before You Begin

This chapter provides information about the mandatory and conditional dependencies for the Oracle E-Business Suite products. The products covered are Oracle Sales Online and Oracle TeleSales.

2.1 Related Documentation

The following are additional documents related to the modules discussed in this guide or referred to in implementation tasks.

- *Oracle Sales Online User Guide*
- *Oracle TeleSales User Guide*
- *Oracle CRM Application Foundation Implementation Guide*
- *Oracle CRM Application Foundation User Guide*
- *Oracle Applications System Administrator's Guide*
- *Using Oracle HRMS -- The Fundamentals*
- *Managing People Using Oracle HRMS Release 11i*
- *Multiple Organizations in Oracle Applications*
- *Oracle General Ledger User Guide*

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

2.2 Installation Verification

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

2.3 Application Procedures

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

2.3.1 Creating an FND User

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

Reference

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

Prerequisites

None

Responsibility

System Administrator

Navigation

Security > User > Define

Steps

1. In the User window, enter a new user name in the User Name field.
2. Enter a password in the Password field.
3. Re-enter the password for verification.
4. Select the employee's name from the list of Values (LOV) in the Person Field.
5. In the Responsibilities sub-tab, select the CRM HTML Administration responsibility from the drop-down list of values.
6. Save the new user.

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

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

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

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

2.3.2 Assigning AOL Responsibilities to the User

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

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

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

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

Reference

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

Prerequisites

None

Responsibility

System Administrator

Navigation

Security > User > Define

Steps

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

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

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

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

Reference

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

Prerequisites

None

Responsibility

System Administrator

Navigation

Security >Profile > System

Steps

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

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

2. Set at least one of the following:

   a. Set the Site value.

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

b. Set the Application value.

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

c. Set the Responsibility value.

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

d. Set the User value.

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

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

3. Save your work.

2.3.4 Creating an Employee

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

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

Reference

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

Prerequisites

None

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

People > Enter and Maintain

Steps

1. Click **New** in the find window.

   The People window opens.

2. Enter the following employee information in the appropriate form fields:

   - Last Name
   - First Name
   - Title

3. Select the person's gender from the drop-down list.
4. Select Employee from the type drop-down list.
5. Enter the person's social security number.
6. Save you work.

2.3.5 Creating a New Business Unit

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

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

Reference

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

Prerequisites

None

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

Work Structures > Organization > Description

Steps

1. Click **New** in the Find Organization window.
2. Enter the name for the Organization
3. Select Business Unit from the list of values (LOV) in the Type field.

   The current date populates the From Date field.
4. Enter the Organization location details from the LOV.
5. Save your work.
6. In the Organization Classification region, select the classification from the LOV.
7. Select the Enabled checkbox.
8. Save your work.
9. Click **Others** for additional information on the classification you selected.
10. Save your work.

2.3.6 Creating a Customer

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

Reference

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

Prerequisites

None

Responsibility

Receivables Manager

Navigation

Customers > Standard

Steps

1. In the Find/Enter Customers window, select Person from the Customer Type drop-down list.
2. Enter the name of the customer in the Name column.
3. Click **Find** to ascertain if the customer already exists.

   As this customer does not exist, the New button is enabled in the Decisions window.
4. Click **New**.

   The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.

   The Customer Addresses window opens.
6. Fill in the necessary information. Yellow fields are mandatory.
7. On the Business Purpose tab, fill in the Usage, Location and select the Primary checkbox. For example:
   - Usage: Marketing
   - Location: 6op9
   - Primary: Yes
8. On the Contacts: Telephones tab, enter a new contact and phone number.
9. Save your work.

Verify the Information

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

1. Open the Customer-Standard window again.
2. Enter the company name you entered above.
3. Click **Find** to query for the record you created in the Match Results window.
4. If the record is found, click the Contacts: Telephone tab.
5. Place the cursor in the Last Name field.

6. From the menu, select **View > Query by Example > Enter**.
7. Enter the contacts last name as the search criteria.
8. Click **View > Query by Example > Run**.

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

2.3.7 Creating a New Organization

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

Reference

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

Prerequisites

None

Responsibility

Receivables Manager

Navigation

Customers > Standards

Steps

1. In the Find/Enter Customer window, select Organization from the Customer Type drop-down list.
2. Enter the name of a test corporation in the Name field.
3. Click **Find** to ascertain if the customer already exists.

   As this customer does not exist, the New button is enabled.
4. Click **New**.

   The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.

The Customer Addresses window opens displaying the same business purpose table as on the first tab.

6. Fill in the necessary information. Yellow fields are mandatory.
7. On the Business Purpose tab, fill in the Usage, Location and select the Primary checkbox. For example:
   - Usage: Marketing
   - Location: 6op9
   - Primary: Yes
8. On the Contacts: Telephones sub-tab, enter a new contact and phone number.
9. Save your work.

2.3.8 Creating a Workflow With Notifications

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

Reference

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

Prerequisites

None

Responsibility

Workflow Administrator

Navigation

Workflow >Launch Processes

Steps

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

   The Initiate Workflow-WFDM page opens.
2. Enter values in the following fields:

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

3. Click **OK**.

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

4. If the status of the workflow is Error, click **Exception** in the Result column to see an explanation of the error.
5. Click **View Diagram** to see a graphical representation of the workflow process.

   Leave the View Diagram window open as you continue to check the workflow.

6. Save your work.

To Review the Progress of a Workflow

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

Steps

1. Login to your Personal Home Page.
2. In the list of Self Service Apps, choose the Workflow User Web Application responsibility.
3. In the Navigator, choose **Workflow >Find Notifications**.

   The Find Notifications page opens.

4. In the Type field, enter Document Management. In the To field, enter the document reviewer.
5. Click **Find**.

The Worklist window opens.

6. Click **Subject** to open the notification.

   If you see the notification, then workflow is set up correctly.

7. Click **Approve** to return to the Worklist window.

Further Verification

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

2.3.9 Creating a Supplier Contact

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

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

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

Reference

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

Prerequisites

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

Responsibility

Purchasing

Navigation

Supply Base > Suppliers

Steps

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

   If you want to prevent invoice or purchase order entry for this supplier after a certain date, then enter the date in the Inactive On field.
5. Enter supplier information in the appropriate tabs of the Suppliers window.

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

2.3.10 Defining Sales Credit Types

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

Reference

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

Prerequisites

None

Responsibility

Order Management Super User

Navigation

Setup > Sales > Credit Types

Steps

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

2.3.11 Setting Up Accounting Flexfields

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

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

Reference

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

Prerequisites

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

Responsibility

General Ledger Super User

Navigation

Setup > Financials > Flexfields > Descriptive > Segments

Steps

Consult the following manuals for more information:

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

2.4 Mandatory Dependencies

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

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

Application or Module	Dependent Applications
Core Sales	OSO, OTS
CRM Foundation Resource Manager	OSO, OTS
General Ledger	OSO, OTS
HRMS	OSO, OTS
Trading Community Architecture	OSO, OTS

2.5 Conditional Dependencies

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

Application or Module	Application(s) with Integration Points
Accounts Receivable	OSO, OTS
Bill of Materials	OSO, OTS
Collections	OSO, OTS
Configurator	OSO, OTS
Contracts	OTS

Application or Module	Application(s) with Integration Points
CRM Foundation Fulfillment	OSO, OTS
CRM Foundation Notes	OSO, OTS
CRM Foundation Task Manager	OSO, OTS
CRM Foundation Territory Manager	OSO, OTS
iMeeting	OTS
Install Base	OTS
Interaction Center	OSO, OTS
Interaction History	OSO, OTS
Inventory	OSO, OTS
iStore	OSO
Marketing Encyclopedia	OSO, OTS
Oracle Marketing	OSO, OTS
Order Capture	OSO, OTS
Order Management	OSO, OTS
Partner Relationship Management	OSO, OTS
Sales Compensation	OSO, OTS
TeleService	OSO, OTS
Universal Work Queue	OTS

Part II

Implementing Oracle Sales Applications

This section contains the following chapters:

3 Implementation Overview

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

- Section 3.1, "Implementation Task Sequence Overview"
- Section 3.1.1, "Implementation Task Sequence for Sales Online"
- Section 3.1.2, "Implementation Task Sequence for Oracle TeleSales"

3.1 Implementation Task Sequence Overview

This section provides implementers with a checklist of implementation steps for Oracle Sales Online and Oracle TeleSales. Find more information about each step by clicking the hyperlink, or, for the printed and PDF versions, following the page reference.

A printed copy of the checklist may be helpful to use as a guide for the implementation steps detailed in the next chapter of this document. Since all steps are not mandatory, you may find it helpful to identify those steps which you plan on covering before starting this process.

3.1.1 Implementation Task Sequence for Sales Online

This section covers the implementation steps for Oracle Sales Online. Some steps are optional if you do not plan to use the associated functionality within your business organization. Mandatory steps are indicated with a "Yes" in the "Mandatory" column.

General Considerations

For information on setting "User" related profile options, please refer to the Oracle Sales Online User Guide, section "Getting Started". These profile options are not part of the implementation process, however, they are important.

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

The implementation steps for Oracle Sales Online are outlined in the table below.

Mandatory	Description
Yes	Create organization and locations (See Section 4.1 on page 4-3.)
Yes	Set up customer model (See Section 4.2 on page 4-3.)
Yes	Set up classifications (See Section 4.3 on page 4-4.)
Yes	Set up relationships (See Section 4.4 on page 4-9.)
Yes	Set up global address formatting (See Section 4.5 on page 4-21.)
No	Set up address validation (See Section 4.6 on page 4-23.)
Yes	Create employees (See Section 4.7 on page 4-24.)
Yes	Set up users, security, and reporting hierarchy (See Section 4.8 on page 4-26.) Review factors that affect security (See Section 4.8.1 on page 4-26.) Review effects of security related profile options (See Section 4.8.2 on page 4-34) Review sample security setups (See Section 4.8.3 on page 4-42.) Define resource groups (SeeSection 4.8.5 on page 4-45.) Define responsibilities (See Section 4.8.6 on page 4-47.) Set up employees as users (See Section 4.8.7 on page 4-48.) Import employees and assign roles and resource groups (See Section 4.8.8 on page 4-49.) Set up system profile options (See Section 4.8.9 on page 4-52.) Set up default user role and sales group (See Section 4.8.10 on page 4-54.) Read about security restrictions (See Section 4.8.11 on page 4-54)
No	Set up flexible data security (See Section 4.9 on page 4-55)
No	Set up contact list management (See Section 4.10 on page 4-96)
Yes	Set up lead management (See Section 4.11 on page 4-102.)
No	Import leads (See Section 4.12 on page 4-103.)

Mandatory	Description
Yes	Set up opportunities and forecasting (See Section 4.13 on page 4-103.)
Yes	Create win probabilities (See Section 4.13.2 on page 4-109.)
Yes	Define or modify sales stages (See Section 4.13.3 on page 4-110.)
No	Set up sales methodology (See Section 4.13.4 on page 4-111.)
No	Set up the calendar (See Section 4.13.5 on page 4-113.)
Yes	Define credit types in Order Management (See Section 4.13.6 on page 4-114.)
Yes	Set up opportunity status (See Section 4.13.7 on page 4-115.)
Yes	Set up interest types (See Section 4.13.8 on page 4-116.)
Yes	Setting up interest codes (See Section 4.13.9 on page 4-118.)
No	Set up plan element mapping (See Section 4.13.10 on page 4-119.)
No	Load inventory categories (See Section 4.13.11 on page 4-120.)
Yes	Set up forecast categories (See Section 4.13.12 on page 4-121)
Yes	Set up forecast category mapping (See Section 4.13.13 on page 4-122.)
No	Set up budget/revenue (See Section 4.13.14 on page 4-123.)
Yes	Set up multiple currencies (See Section 4.14 on page 4-125.)
Yes	Set up currency codes (See Section 4.14.1 on page 4-126)
Yes	Set up calendar types (See Section 4.14.2 on page 4-127.)
Yes	Set up accounting calendar (See Section 4.14.3 on page 4-128.)
Yes	Set up the default currency and selecting the calendar (See Section 4.14.4 on page 4-129.)
Yes	Set up type mapping (See Section 4.14.6 on page 4-130.)
Yes	Set the profile options for multiple currencies (See Section 4.14.7 on page 4-131.)
	Set up reporting currency mapping (See Section 4.14.8 on page 4-131.)
Yes	Enter GL daily conversion rates (See Section 4.14.9 on page 4-132.) Only if more than one currency is used.
Yes	Enter currency conversion dates for periods (See Section 4.14.10 on page 4-134.) Only if more than one currency is used.
Yes	Define conversion rates for periods (See Section 4.14.10.1 on page 4-134.)
Yes	Run concurrent programs (See Section 4.14.11 on page 4-135.)
No	Set up quoting (See Section 4.15 on page 4-136.)
No	Set up flexfields (See Section 4.16 on page 4-137.)
No	Set up the home page (See Section 4.17 on page 4-139.)

Mandatory	Description
No	Set up menu administration (See Section 4.19 on page 4-157.)
No	Set up CRM Foundation Modules (See Section 4.20 on page 4-160.) Set up notes (See Section 4.20.1 on page 4-161.) Set up interaction tracking (See Section 4.20.2 on page 4-162.) Set up tasks (See Section 4.20.3 on page 4-162.) Set up calendar (See Section 4.20.4 on page 4-163.) Set up fulfillment (See Section 4.20.5 on page 4-163.)
No	Set up territories (See Section 4.21 on page 4-164.) Set up and use territory assignment program (See Section 4.22 on page 4-165)
No	Attach custom JSP pages (See Section 4.23 on page 4-189)
No	Add a custom report to reports page (See Section 4.24 on page 4-190)
No	Exclude a tab or function (See Section 4.25 on page 4-192)
No	Set minimum number of search characters for lists of values (See Section 4.26 on page 4-194)
No	Set up Partners Online (See Section 4.27 on page 4-196.)
No	Set up marketing source codes (See Section 4.28 on page 4-197.)
No	Set up Marketing Encyclopedia System (See Section 4.29 on page 4-198.)
No	Set up Incentive Compensation (See Section 4.30 on page 4-198.)
No	Add competitors to Marketing (See Section 4.31 on page 4-198)
No	Set up Sales Offline (See Section D.1 on page D-1)
No	Set up WebMail Integration (See Section 4.32 on page 4-199)

3.1.2 Implementation Task Sequence for Oracle TeleSales

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

Mandatory	Description
Yes	Create organization and locations (See Section 4.1 on page 4-3.)
Yes	Set up customer model (See Section 4.2 on page 4-3.)
Yes	Set up classifications for customers (See Section 4.3 on page 4-4.)

Mandatory	Description
Yes	Set up relationships for parties in the database. At minimum, you must make sure that the Create Party flag is set to Y for all of the relationships you use. (See Section 4.4 on page 4-9.)
Yes	Set up global address formatting (See Section 4.5 on page 4-21.)
No	Set up address validation (See Section 4.6 on page 4-23)
Yes	Create employees (See Section 4.7 on page 4-24.)
Yes	Set up users, security, and reporting hierarchy (See Section 4.8 on page 4-26.) Review factors that affect security (See Section 4.8.1 on page 4-26.) Review effects of security related profile options (See Section 4.8.2 on page 4-34) Review sample security setups (See Section 4.8.3 on page 4-42.) Define resource groups (SeeSection 4.8.5 on page 4-45.) Define responsibilities (See Section 4.8.6 on page 4-47.) Set up employees as users (See Section 4.8.7 on page 4-48.) Import employees and assign roles and resource groups (See Section 4.8.8 on page 4-49.) Set up system profile options (See Section 4.8.9 on page 4-52.) Set up default user role and sales group (See Section 4.8.10 on page 4-54.) Read about security restrictions (See Section 4.8.11 on page 4-54)
Yes	Set up lead management (See Section 4.11 on page 4-102.)
No	Import leads (See Section 4.12 on page 4-103.)
Yes	Set up opportunities and forecasting (See Section 4.13 on page 4-103.) Create win probabilities (See Section 4.13.2 on page 4-109.) Define or modify sales stages (See Section 4.13.3 on page 4-110.) Set up sales methodology (See Section 4.13.4 on page 4-111.) Set up the calendar (See Section 4.13.5 on page 4-113.) Define credit types in Order Management (See Section 4.13.6 on page 4-114.) Set up opportunity status (See Section 4.13.7 on page 4-115.) Set up interest types (See Section 4.13.8 on page 4-116.) Setting up interest codes (See Section 4.13.9 on page 4-118.) Set up plan element mapping (See Section 4.13.10 on page 4-119.) Load inventory categories (See Section 4.13.11 on page 4-120.)

Mandatory	Description
No	Set up multiple currencies (See Section 4.14 on page 4-125.) Set up calendar types (See Section 4.14.2 on page 4-127.) Set up accounting calendar (See Section 4.14.3 on page 4-128.) Set up the default currency and selecting the calendar (See Section 4.14.4 on page 4-129.) Set up type mapping (See Section 4.14.6 on page 4-130.) Set the profile options for multiple currencies (See Section 4.14.7 on page 4-131.) Set up reporting currency mapping (See Section 4.14.8 on page 4-131.) Enter GL daily conversion rates (See Section 4.14.9 on page 4-132.) Enter currency conversion dates for periods (Pseudo Period Rates.). (See Section 4.14.10 on page 4-134.) Define conversion rates for periods (See Section 4.14.10.1 on page 4-134.) Run Concurrent Programs (See Section 4.14.11 on page 4-135.) Set up forecast category mapping (See Section 4.13.13 on page 4-122.) Set up budget/revenue (See Section 4.13.14 on page 4-123.)
No	Set up quoting (See Section 4.15 on page 4-136.)
No	Set up flexfields (See Section 4.16 on page 4-137.)
No	Set up CRM Foundation Modules (See Section 4.20 on page 4-160.) Set up notes (See Section 4.20.1 on page 4-161.) Set up interaction tracking (See Section 4.20.2 on page 4-162.) Set up tasks (See Section 4.20.3 on page 4-162.) Set up calendar (See Section 4.20.4 on page 4-163.) Set up fulfillment (See Section 4.20.5 on page 4-163.)
No	Set up territories (See Section 4.21 on page 4-164) Set up and use territory assignment program (See Section 4.22 on page 4-165)
No	Set up Partners Online (See Section 4.27 on page 4-196.)
No	Set up marketing source codes (See Section 4.28 on page 4-197.)
No	Set up the Marketing Encyclopedia System (See Section 4.29 on page 4-198.)
No	Set up Incentive Compensation (See Section 4.30 on page 4-198.)
No	Se up the profile option for Quick Menu (See Section 5.1 on page 5-2.)
No	Customize the interface by setting default tabs and hiding tabs (SeeSection 5.2 on page 5-2.)

Mandatory	Description
No	Set up custom tabs (See Section 5.3 on page 5-6.)
No	Set up the ability to launch HTML-based applications. (See Section 5.4 on page 5-9.)
No	Set up the ability of agents to view maps for addresses via integration with a mapping application. (See Section 5.5 on page 5-9.)
Yes	Set up the Universal Work Queue (See Section 5.6 on page 5-10.)
No	Set up marketing events using Oracle Marketing. (See Section 5.7 on page 5-14.)
No	Set up marketing collateral (See Section 5.8 on page 5-15.)
No	Set up scripting (See Section 5.9 on page 5-18.)
No	Set up call center applications (See Section 5.10 on page 5-18.)
No	Assign marketing source codes to agents. (See Section 5.11 on page 5-19.)
No	Set up eMail Center (See Section 5.12 on page 5-22.)
No	Enable interaction tracking and set up automatic interaction tracking and wrap-up. (See Section 5.13 on page 5-22.)
No	Enable web directory assistance (See Section 5.14 on page 5-33.)
No	Set up the application for non-sales users
No	Set up relationship plan (See Section 5.15 on page 5-36.)
No	Set up address validation (See Section 5.16 on page 5-36.)
No	Set up the dashboard (See Section 5.17 on page 5-36.)
No	Set up the At a Glance window (See Section 5.18 on page 5-36.)
No	Set up Web Collaboration (See Section 5.19 on page 5-44.)
No	Set up Universal Search to include Collections objects (See Section 5.20 on page 5-44.)
No	Set up integration with Oracle Order Management (See Section 5.21 on page 5-45.)
No	Set up integration with Contracts (See Section 5.22 on page 5-46.)

4

Implementing Oracle Sales Applications

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

- Chapter 5, "Implementation Tasks for Oracle TeleSales"

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

Perform the following steps:

- Section 4.1, "Creating Organizations and Locations"
- Section 4.2, "Setting Up the Customer Model"
- Section 4.3, "Setting Up Classifications"
- Section 4.4, "Setting Up Relationships"
- Section 4.5, "Setting Up Global Address Formatting"
- Section 4.6, "Setting Up Address Validation"
- Section 4.7, "Creating Employees"
- Section 4.8, "Setting Up Users, Security, and Reporting Hierarchy"
- Section 4.9, "Setting Up Flexible Data Security"
- Section 4.10, "Setting Up Contact List Management"
- Section 4.11, "Setting Up Lead Management"
- Section 4.12, "Importing Leads"

4.1 Creating Organizations and Locations

Responsibility

US HRMS Manager

Navigation

HRMS Setup > Organization

Applies to: Sales Online, TeleSales

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

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

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

For more information about security, please refer to Section 4.8, "Setting Up Users, Security, and Reporting Hierarchy".

Reference

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

4.2 Setting Up the Customer Model

Applies to: Sales Online, TeleSales

You must add new customer categories to be used when creating new customers by following the instructions in the "Customers" chapter of the *Oracle Receivables User Guide*.

4.3 Setting Up Classifications

Applies to: Sales Online, TeleSales

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

Example

For example, if you want to know the industry sector to which a party belongs, you can use a pre-defined class category, such as 'SIC 1987', which includes the 1987 version of standard industrial classification codes. You can also define your class categories for you own purposes. For example, you may define a class category to determine if there is a special business consideration, special pricing arrangement, or special term for a party.

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

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

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

Prerequisites

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

The user interface allows you to enter complex hierarchical classifications, however, the hierarchy is not displayed on the screen. Therefore, it is important that you have mapped out the parent and child relationships of each classification node in the tree before you begin to input the information.

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

See Also

Refer to the section about Restrictions for important information.

Forms Responsibility

Oracle Sales Administrator

Forms Navigation

Administration > Sales > takes you to HTML

HTML Responsibility

Oracle Sales Online Super User

HTML Navigation

Administration > General > Customer Administration > Classification

Steps

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

1. Click **Create**.

   The Create Classification page appears.

2. Enter a name for your classification scheme in Class.
3. Enter a meaning for the classification.
4. Optionally, enter a description.
5. Select one or more boxes which represent the rules that will govern the relationships between the different nodes in your classification scheme hierarchy. The available rules are:

   - Allow Multiple Parents: Selecting this box means that any node in your hierarchy can have more than one parent. Leaving this box unselected permits only one parent.
   - Allow Leaf Nodes Only: Restricts you to assigning only the leaf nodes of any class code hierarchy. This means only those codes that have no

children. Leaving this box unselected means that you can use any class codes for this class category.

- Allow Multiple Assignments: Selecting this box permits sales application agents or salespeople to classify a customer, an opportunity, or other object using more than one code from the class category you are creating. Leaving this box unselected restricts agents or salespeople to using only one code.

6. Use the Owner Table drop-down list to select HZ-PARTIES. This is the only table where you can set up classifications. In this release, you can only set up classifications for customers.
7. Use the Column drop-down list to select PARTY_ID. This is the only column where you can set up classifications.
8. Optionally, you can enter a SQL *Where* condition in the Condition column.
9. Click **Create**.

   The Class Detail page appears. You are now ready to create the classification codes for the classification you have created.
10. Click **Classification Codes**.

    The Classifications page appears.
11. Enter all of the codes, both the nodes and leaves in the hierarchy, by making entries in the following fields:
    - Code: This is the name you will use to build your classification hierarchy.
    - Meaning: This is what the user sees when they use your classification scheme.
    - Description: An optional description.
12. Click **Update**.

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

    This is done by adding child codes, so you must start at the top of the hierarchy and work your way down.
13. To create a classification hierarchy of the classification codes, then, for each code:

    a. Click the link in the Code column.

       The Classification Detail page appears.

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

The Child Code region lists all codes in the level below this code in the hierarchy.

b. In the Add a Class Code field, enter the code name or a partial code name for the code(s) you want to enter as children. You can use the % sign for any missing letters.

c. Click **Go**.

   The Select Class Code page appears listing the results of your search. You can keep this page open and use the search at the top to search for additional source codes.

d. Select the Select boxes for any codes you want to add as children.

e. Click **Go**.

   The Classification Detail page appears. The Child Code column now lists the child nodes you have selected.

f. Enter the required Start Date for each child node. You can use the date button to select the date from the calendar.

g. Click **Update**.

   You are now ready to add additional child nodes. You can go back to the Select Class Code page to search for additional child codes to add to this node. Or you can click on the link of any of the child nodes on this page to add children to those nodes.

14. Set up the concurrent program *Refresh of Customer Classification Denormalization* to perform a data refresh that will populate the denorm table `as_hz_class_code_denorm`.

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

    - The first time you install the patch which contains the classification feature. This will populate the denorm table, `as_hz_class_code_denorm`.
    - Every time you enter or update classification related data that is not updated from the Oracle Sales Online Administration tab. For example, if you enter or update data in *AR quick code lookups* forms.

- Every time you install a TCA or FND patch that has added more seeded data for classifications.
- If the profile *OS: Enable Real Time Denormalization for Customer Classification* is set to No. This means that data entered or updated from the Oracle Sales Online Administration tab is not denormalized in real time.

15. Set the profile *OS: Enable Real Time Denormalization for Customer Classification*. The default value is Yes. If the profile is set to Yes, real time denormalization for code relations is enabled. This means that data entered or updated from the Oracle Sales Online Administration tab will be denormalized into `as_hz_class_code_denorm` in real time. If this profile is set to No, there is no denormalization performed online.

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

Restrictions

- Currently, one classification with multiple parents is not supported. In the Classification Category lookup, we only show categories for which the ALLOW_MULTI_PARENT_FLAG is N.
- Classification codes can have parent child relationships with other classification codes in the same classification category. This can create a hierarchical structure with indefinite depth. This could cause a performance problem for search functionality. To ease this problem, we will only allow a maximum depth of 4 levels.
- The column ADDITIONAL_WHERE_CLAUSE in HZ_CLASS_CATEGORY_USES is used to provide restrictions on classification categories. The following three restriction are currently supported:
    - WHERE PARTY_TYPE='ORGANIZATION'
    - WHERE PARTY_TYPE='PERSON'
    - WHERE PARTY_TYPE='PARTY_RELATIONSHIP'
- The report will only return code assignment for a person, organization, person-to-organization relationship, or person-to-person relationship. Although the user can assign codes to the organization-to-organization relationship, we do not provide reporting functionality for these code assignments. This is because security is only provided for person, organization, person-to-person and person-to-organization relationships.

- For the Task Classification Report, the Party-Task association is based on Source, not References. For example, if the classification filter criteria matches a party, the tasks directly associated with the party (in the JTF_TASK. SOURCE_OBJECT_ID) will be returned. But if there are tasks associated with an opportunity belonging to a party, and the task is related to the party (using References), then such tasks will not be shown in the report.

4.4 Setting Up Relationships

Applies to: Sales Online, TeleSales

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

You must make sure each relationship your implementation uses has the Create Party (CREATE_PARTY) flag set to Yes. Follow the steps described in Table 4.4.5, "Setting Up Relationships for Customers Upgrading from Previous Releases" on page 4-20.

You can also:

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

Please note, the create_party_flag will always be selected if HZ.J is installed.

About Relationships in Sales Applications

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

- Business relationships between two individuals, such as "reports to".
- Personal relationships between two individuals, such as "parent of" and "child of".
- Relationships between individuals and organizations, such as "employee of" and "manager of".
- Relationships between different organizations, such as "subsidiary of".

- Relationships between outside organizations and your own internal organizations. For example, "competitor of".

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

A relationship consists of:

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

Relationship Subjects, Objects, and Party Types

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

About Setting Up the Automatic Capture of Reciprocal Relationships

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

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

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

4.4.1 Modifying Seeded Relationships

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

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

Lookups fall into three categories. They are listed below:

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

The following table lists all of the seeded relationship codes for the lookup PARTY_RELATIONS_TYPE with an explanation for each:

Code	Explanation
ADVERTISER	Advertiser
AFFILIATE_TO	Affiliate
AGREEMENT_SIGNER_OF	The party that signs agreements on behalf of another party
AUNT_OF	Aunt
BENEFICIARY_OF	Beneficiary

Code	Explanation
BILL_CONSOLIDATOR_FOR	Bill Consolidator For
BILL_CONSOLIDATOR_AT	Bill Consolidator At
BILL_PRESENTER_FOR	Bill Presenter For
BILL_PUBLISHER_AT	Bill Publisher At
BILL_PUBLISHER_FOR	Bill Publisher For
BILLER_AT	When an organization is a registered biller.
BILLER_FOR	Biller For
BILLTO_OF	The alternate billing party for the buyer.
BOARD_MEMBER_OF	Board Member
BROTHER_OF	Brother
BUSINESS_PARTNER_FOR	Business Partner
CEO_OF	CEO
CFO_OF	CFO
CHANNEL_FOR	Channel
CIO_OF	CIO
COMPETITOR_OF	Competitor
CONSULTANT_FOR	Consultant
CONTACT_OF	Contact
COUSION_OF	Cousin
CUSTOMER_OF	Customer
DAUGHTER_OF	Daughter
DEPENDENT_OF	Dependent
DIVISION_OF	Division
DOMESTIC_ULTIMATE_OF	Domestic Ultimate of
EMPLOYEE_OF	Employee
FATHER_OF	Father
FIELD_SERVICE_PROVIDER_FOR	Field Service Provider
GENERAL_EMPLOYEE_OF	General Employee

Code	Explanation
GLOBAL_ULTIMATE_OF	Global Ultimate of
GUARANTOR_FOR	Guarantor
GUARDIAN_OF	Guardian
HEADQUARTERS_OF	Headquarters of
KEY_DECISION_,MAKER_FOR	Key Decision Maker
LEGAL_COUNSEL_FOR	Legal Counsel
MEMBER_OF	Member
MOTHER_OF	Mother
OWNED_BY	Owned
PARENT_OF	Parent
PARTNER_OF	Partner
PARENT_OF	Parent
PAYFROM_OF	The alternate party to pay for a buyer.
PAYTO_OF	The alternate payee name for the seller.
PUBLISHER	Publisher
REPAIR_DEPOT_PROVIDER_FOR	Repair Depot Provider
REPORTS_TO	Reports To
SELLER_FOR	Seller
SELLER_FOR	Seller
SHIPTO_OF	The alternate shipping party for the buyer
SIBLING_OF	Sibling
SISTER_OF	Sister
SON_OF	Son
SPOUSE_OF	Spouse
STOCK_HOLDER_OF	Stock Holder
STUDENT_OF	Student
SUBSIDIARY_OF	Subsidiary
UNCLE_OF	Uncle
VENDOR_OF	Vendor

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

4.4.2 Setting Up Relationship Usage and Reciprocal Relationships

Use this procedure to:

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

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > General > Customer Administration > Relationship

Responsibility

Oracle Sales Online Super User

Steps

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

1. Click **Create**.

   The Create Relationships page opens.

4.4.3 Setting Up Reciprocal Relationships

Navigation

Administration > General > Customer Administration > Relationship

Responsibility

Oracle Sales Online Super User

Steps

If you are setting up a reciprocal relationship:

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

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

4.4.4 Setting Up Non-Reciprocal Relationships

Navigation

Administration > General > Customer Administration > Relationship

Responsibility

Oracle Sales Online Super User

Steps

If you are setting up a non-reciprocal relationship:

1. Enter the name of the relationship setup you are creating in the Relationship field. This name is for implementer use only. It helps you identify the setup you are creating. It is not visible to users of sales applications.
2. Select the relationship that you want to setup using the Forward Relationship Code drop-down list.
3. Select the same relationship code for the Backward Relationship as you have selected for the Forward Relationship code.
4. Using the Subject Name drop-down list, select the party to which this relationship setup applies.
5. Using the Object Name drop-down list, select the party that can be the object of this relationship. Valid parties for sales applications are: Person and Organization.
6. Enter Non Directional for the Directional Code.
7. Select the Enabled box. This is required.
8. Select the Create Party box. This is required as sales applications create a new party in the database whenever a new relationship is entered.
9. Click **Create**.

Guidelines

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

Each row of the table consists of the following columns:

- **Relationship**: This is the relationship from PARTY_RELATIONS_TYPE that is used to capture a relationship between two parties in the database.

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

The following table lists all seeded relationships including reciprocal relationships.

Relationship	Reverse Relationship	Subject Type	Object Type
Affiliate to		Organization	Organization
Agreement signer of		Organization	Organization
Associate of	Associate of	Person	Person
Beneficiary of	Benefactor of	Person	Person
Benefactor of	Beneficiary of	Person	Person
Beneficiary of	Benefactor of	Organization	Person
Benefactor of	Beneficiary of	Person	Organization
Board member of		Person	Organization
Competitor of	Competitor of	Organization	Organization
Contact of		Person	Organization
Contact of		Person	Person
Customer of	Seller to	Person	Organization
Seller to	Customer of	Organization	Person
Customer of	Seller to	Organization	Organization

Relationship	Reverse Relationship	Subject Type	Object Type
Seller to	Customer of	Organization	Organization
Dependent of	Guardian of	Person	Person
Guardian of	Dependent of	Person	Person
Division of	Headquarters of	Organization	Organization
Headquarters of	Division of	Organization	Organization
Domestic ultimate of	Domestic subsidiary of	Organization	Organization
Domestic subsidiary of	Domestic ultimate of	Org	Org
Employee of	Employer of	Person	Organization
Employer of	Employee of	Organization	Person
Global ultimate of	Global subsidiary of	Organization	Organization
Global subsidiary of	Global ultimate of	Organization	Organization
Guarantor for	Dependent of	Organization	Organization
Dependent of	Guarantor for	Organization	Organization
Member of	Contains member	Person	Organization
Contains member	Member of	Organization	Person
Member of	Contains member	Person	Group
Contains member	Member of	Group	Person
Member of	Contains member	Organization	Group
Contains member	Member of	Group	Organization
Parent of	Child of	Person	Person
Child of	Parent of	Person	Person
Partner of	Partner of	Organization	Organization
Payfrom of		Organization	Organization
Payto of		Organization	Organization
Repair depot provider for		Organization	Organization
Reports to	Manager of	Person	Person
Manager of	Reports to	Person	Person
Shipto of		Organization	Organization

Relationship	Reverse Relationship	Subject Type	Object Type
Sibling of	Sibling of	Person	Person
Spouse of	Spouse of	Person	Person
Stock holder of		Person	Organization
Stock holder of		Organization	Organization
Student of		Person	Organization
Subsidiary of	Parent of	Organization	Organization
Parent of	Subsidiary of	Organization	Organization
VAD of		Organization	Organization
Relative of	Relative of	Person	Person
Domestic partner of	Domestic partner of	Person	Person
Var of		Organization	Organization

4.4.5 Setting Up Relationships for Customers Upgrading from Previous Releases

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

Forms Responsibility

Oracle Sales Administrator

Forms Navigation

Administration > takes you to HTML

HTML Responsibility

Oracle Sales Online Super User

HTML Navigation

Administration > General > Customer Administration > Relationship

Steps

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

1. For each relationship in the table used by your implementation:
   a. Select the link for a relationship.

      The Relationship Detail page appears.
   b. Make sure that the Create Party box is selected.
   c. Click **Update**.
2. Bounce the Apache server.

4.5 Setting Up Global Address Formatting

Applies to: Sales Online, TeleSales

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

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

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

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

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

  There are six preset address formats that are available:

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

It is important to confirm that you have set up each country that you are doing business with to ensure that the proper address format can be used.

Use the following procedure to map address styles.

Responsibility

Oracle Sales Administrator

Navigation

Receivables Manager > Countries and Territories

Steps

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

4.5.1 Differences Between Oracle Receivables and Sales Setups

This section covers the differences between the setup required by sales applications and those you must perform as described in the "Customers" chapter of the *Oracle Receivables User Guide*.

- Descriptive Flexfield details:

  DESCRIPTIVE FLEXFIELD NAME: Remit Address HZ

  Title: Address

  Application: Oracle Receivables

  Table: HZ_LOCATIONS
- Additional profile option for Default Country behavior: *OSO: Default Country*.
- If there is no address style associated with a country, then sales applications use the setting of *OS: Default Address Style* as the default address style instead of the standard address format in Oracle Receivables. The seeded default value of this option is AS_DEFAULT.
- Sales applications include the following additional address style in addition to the address styles provided by Oracle Receivables:

  Oracle Sales Default Address Style: AS_DEFAULT (This is set as the default for the profile option *OS: Default Address Style*).

The following table lists the columns for the AS_DEFAULT style.

Table Name	Database Column
HZ_LOCATIONS	ADDRESS1
HZ_LOCATIONS	ADDRESS2
HZ_LOCATIONS	ADDRESS3
HZ_LOCATIONS	ADDRESS4
HZ_LOCATIONS	STATE
HZ_LOCATIONS	COUNTY
HZ_LOCATIONS	CITY
HZ_LOCATIONS	POSTAL_CODE

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

4.6 Setting Up Address Validation

The address validation functionality checks for valid addresses when a user creates or updates an address. If the address is not valid, the application will prompt the user to amend the address to a valid address.

To turn on or off this functionality, set the system profile option for Oracle Sales Online and the system parameter from Oracle Accounts Receivable.

Applies to: Sales Online, TeleSales

Responsibility

Sales Online User, Sales Online Manager, System Administrator

Navigation

For Oracle Sales Online:

Oracle Sales Setup > System Profiles

Steps

Set the profile option *OS: Perform Address Validation* to Yes. The default is No.

Navigation

For Oracle Accounts Receivable:

Receivables Manager > Setup > System > System Options > Tax

Steps

Set the Oracle Accounts Receivables system parameter *Address Validation* to:

- Error: User will receive an error if the address entered is invalid
- Warning: User will receive a warning if the address entered is invalid, but user can continue to commit the changes to the database
- No Validation: No check is performed on the address

4.7 Creating Employees

Applies to: Sales Online, TeleSales

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

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

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

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

4.7.1 With Full Oracle HRMS License

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

Responsibility

US HRMS Manager

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

Navigation

People > Enter and Maintain

Steps

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

4.7.2 With Shared Oracle HRMS License

Responsibility

Oracle Sales Administrator

Navigation

CRM Foundation > Resource Manager > Maintain Employee > Employee

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

Steps

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

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

4.8 Setting Up Users, Security, and Reporting Hierarchy

Applies to: Sales Online, TeleSales

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

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

Note: If you are using Flexible Data Security with Oracle Sales Online, this section will not affect your security settings.

See Section 4.9, "Setting Up Flexible Data Security".

4.8.1 Factors That Affect Security

The ability to access, view, and update customer, lead, and opportunity information is determined by a combination of settings.

Responsibilities determine the menus and functions that are available to users within that responsibility. The Resource Manager setup of roles, groups, and hierarchies determines how opportunities are rolled up for reports and forecasting within the CRM sales family.

Profile options are a set of changeable options that affect the way your application looks and behaves. System Administrators control how applications operate by setting user profile options to the values you want.

Sales teams can be built for either a consumer (a party of type Person) or an organization. A sales team is a set of salespersons who have been assigned manually or automatically using Territory Management. The ability to access, view, or update a particular customer can be based on sales team membership.

Within sales applications, there are three main Roles: Administrator, Manager, and Agent/Representative. Roles further categorize the user's access to information.

A Resource Group is a set of employees within your organization. Groups can be organized into hierarchies that mirror the reporting structure of your sales organization.

Here is a more detailed look at the elements that affect information access:

- Responsibilities
- Roles
- Resource Groups
- Territory Management and Sales Team Assignment
- System Profile Options
- Customer Sales Teams
- Lead Sales Team
- Opportunity Sales Team

Responsibilities

Responsibilities allow users to access only those functions that are appropriate to their positions within a company. Responsibilities are associated with a menu, a hierarchical arrangement of application functions that define the range of functionality that is available to that responsibility. You can assign one or more responsibilities to each user.

Please refer to the *Oracle Applications System Administrators Guide* for more information.

Roles

Within sales applications, there are three main roles: Administrator, Manager, and Agent/Representative. Use Resource Manager to assign at least one role to every sales employee.

Although roles and responsibilities can often have the same name, they perform different functions. Responsibilities are a general feature of all Oracle applications and control what features of the application a user can access. By contrast, roles control what customer, lead, and opportunity information users can view and modify.

Here are the available roles as delivered with the application without modification to any profiles:

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

The level of access that these roles provide is dependent on the setting of profiles *OS: Customer Access Privilege, OS: Sales Lead Access Privilege,* and *OS: Opportunity Access Privilege.* These profiles can override any restrictions based on roles.

Resource Groups

A Group is a set of employees within your organization. Groups can be organized into hierarchies that mirror the reporting structure of your sales organization. The hierarchy that you build determines the following:

- How opportunity information is rolled up.
- How customer, lead, and opportunity information that is created by a sales employee is accessed by other members of the sales organization.

  For example, an employee with the role of Manager that is assigned to a group in the hierarchy has access to customer, lead, and opportunity information created by individuals in that group and in subordinate groups.

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

Territory Management and Sales Team Assignment

Territory Management assigns customers, leads, and opportunities to sales employees based on configurable business rules. A Sales Team is a set of salespersons who have been assigned manually or automatically using Territory Management. A Territory Administrator creates territories within the structure of a territory hierarchy. The Territory Administrator then enables the territory definitions. After completing these steps, you run a concurrent program with Territory Management to return a set of employees assigned to a particular business object.

System Profile Options

System Profile Options determine the level of access provided by sales teams, groups, and roles. Some profile options determine whether certain roles have the ability to create new customers, leads, and opportunities. Other profile options determine whether certain roles are allowed to update specific lead and opportunity attributes.

You can set user profile options at these different levels: site, responsibility, and user.

- **Site**: Option settings pertain to all users at an installation site.
- **Responsibility**: Option settings pertain to all users currently signed on under the responsibility.
- **User**: Option settings pertain to an individual user, identified by the application user name.

Profile values can be set at one or more levels. However, a User setting overrides a Responsibility setting, which overrides a Site setting.

Please refer to the *Oracle Applications System Administrators Guide* for more information regarding managing profile options.

There are seven categories of security related system profile options:

General Access Privilege: These profile options determine how each of the three roles (Administrator, Manager, and Agent/Representative) are allowed to view, create, and update.

- OS: Opportunity Access Privilege
- OS: Customer Access Privilege
- OS: Lead Access Privilege

Creation: These profile options determine whether a particular user is allowed to create a new organization, person, or contact.

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

Creation of Opportunities and Leads: This profile option determines whether a user can create opportunities and leads for all customers or only for those customers that the user can access.

- OS: Enable Customer LOV Security

Ownership Change: These profile options determine whether a user is allowed to change the owner of a lead or opportunity.

- OS: Privilege to Change Lead Owner
- OS: Privilege to Change Opportunity Owner

View-Only Access: These profile options can be used to bypass existing security and give view-only access to organization detail, person detail, and opportunity detail pages.

- OSO: Organization Detail Security Check (applies to Oracle Sales Online only)
- OSO: Person Detail Security Check (applies to Oracle Sales Online only)
- OSO: Opportunity Detail Security Check (applies to Oracle Sales Online only)
- OSO: Quick Find Security Check (applies to Oracle Sales Online only)

Internal Partner and Competitor Visibility: These profile options allow users to view the partners and competitors of their internal organization whether or not they are granted access to the partner or competitor information with other profile options.

- OS: View Partner Party Detail
- OS: View Competitor Party Detail

Sales Admin Update / Manager Update: These profile options increase the access of the sales administrator role and manager role. Employees with the sales administrator role can access the same information as employees with the manager role. Alternatively, employees with the sales administrator role can update the same customers, leads, and opportunities as the manager's subordinates.

- OS: Sales Admin Update Access

- OS: Manager Update Access

For example, setting *OS: Customer Access Privilege* to **Full** allows employees to update customer information even if they are not on the customer's sales team. Other system profile options merely refine access set elsewhere. Setting the profile option *OS: Manager Update Access* to **Update data,** for example, gives managers access to the opportunities and leads of their subordinates.

Customer Sales Teams

Sales teams can be built for either a consumer (a party of type Person) or an organization. A sales team is a set of salespersons who have been assigned manually or automatically to a party using Territory Management. The ability to access, view, or update a particular customer can be based on sales team membership.

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

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

- Users can control who has access to information on a customer sales team by selecting the Keep box next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.
- A user on a sales team for a customer gains automatic access to all of the records of any contact with a relationship to that organization. Users need not be on the sales teams for both the consumer and the organization. It is sufficient for them to be on the organization sales team to have access to personal information.
- All agents or salespeople on an opportunity sales team have view access, but to allow them to make changes the opportunity creator must select the Full Access box next to their names. Members with an unselected box have read-only access.

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

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

Lead Sales Team

Sales teams can be built for a lead. A sales team is a set of salespersons who have been assigned, manually or automatically, using Territory Management. The ability to access, view, or update a particular lead can be based on sales team membership.

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

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

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

  The automatic lead assignment program uses the same territories as Territory Management. It assigns the first person in the territory as the lead owner and the remaining people as sales team members.
- Members of the lead sales team for a specific customer who are assigned the role of **Account Manager** can view all leads for that customer regardless who these leads are assigned to. The default setting for this role is controlled by the system profile option *OS: Customer Sales Team Default Role Type.*

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

Opportunity Sales Team

Sales teams can be built for an opportunity. A sales team is a set of salespersons who have been assigned, manually or automatically, using Territory Management. The ability to access, view, or update a particular opportunity can be based on sales team membership.

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

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

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

- Sales team members are assigned either automatically, by the Territory Management module, or manually, by the creator of the opportunity. The creator of an opportunity is automatically put on the sales team with full modification privileges.
- All agents or salespeople on an opportunity sales team have view access, but to allow them to make changes the opportunity creator must select the Full Access box next to their names. Members with an unselected box have read-only access.
- Sales team members can control who has access to information on the opportunity sales team by selecting the Keep box next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.
- The customer record creator or sales team member can select a role for each sales team member. Selecting the role of **Account Manager** gives a sales team member the ability to view all of the opportunities and leads for the customer. The default setting of the Role field is controlled by the system profile option *OS: Opportunity Sales Team Default Role Type.*

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

4.8.2 Effects of Security Related Profile Options

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

4.8.2.1 Access to Customer Information

The following table describes the effect of different settings on access to customer information. A customer can be either a consumer (party type of Person) or an organization. This table is organized by the different settings of the profile option *OS: Customer Access Privilege* as this profile option has the biggest impact on access to customer data.

OS: Customer Access Privilege	Who Can View	Who Can Create	Who Can Update
Full	Employees with any role can view all customers.	Employees with Manager, Agent, and Representative roles can create customers. The Administrator role cannot create customers.	Employees with any role can update all customers.
Prospecting	Employees with any role can view all customers.	Employees with Manager, Agent, and Representative roles can create customers. The Administrator role cannot create customers.	Employees with any role can update customer information provided they are on the sales team with Full acess.) Employees with the Manager role can access customer information for their subordinates. If *OS: Manager Update Access* is set to **Update data,** then the managers can update any customer information their subordinates can view. If this system profile is set to **Inherit data,** then the managers can only update information their subordinates can update.

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

The following table describes the effect of different settings for the profile listed.

OS: Create Organization Privilege	Who Can Create
Yes (default)	User with Manager or Representative roles can create organizations. Administrator role cannot create.
No	User cannot create organizations.

The following table describes the effect of different settings for the profile listed.

OS: Create Person Privilege	Who Can Create
Yes (default)	User with Manager or Representative roles can create people. Administrator role cannot create.
No	User cannot create people.

The following table describes the effect of different settings for the profile listed.

OS: Create Contact Relationship Privilege	Who Can Create
Yes (default)	User with Manager or Representative roles can create contact relationships. Administrator role cannot create.
No	User cannot create organizations.

The following table describes the effect of different settings for the profile listed.

OSO: Organization Detail Security Check	Who Can View
Yes (default)	If set to Yes, then security check will be performed on the user. If access to organization details is not allowed by other profile options, then access is denied.
No	If set to No, then security check will not be performed. View access is given to organization details. Create or update access depends on the related profile options.

The following table describes the effect of different settings for the profile listed.

OSO: Organization Person Security Check	Who Can View
Yes	If set to Yes, then security check will be performed on the user. If access to person details is not allowed by other profile options, then access is denied.
No	If set to No, then security check will not be performed. View access is given to person details, create or update access depends on the related profile options.

The following table describes the effect of different settings for the profile listed.

OSO: Quick Find Security Check	Applies to	Description
Yes (default)	Organization and Person	If set to Yes, then security is checked. The Quick find result displays only those records for which the user has access.

OSO: Quick Find Security Check	Applies to	Description
No	Organization and Person	If set to No, then security is not checked and Quick find result displays all records. However, user cannot view details of organizations or people if they try to drill down to details if user does not have access. User will receive an error message.

4.8.2.2 Access to Opportunity Information

The following table shows the different levels of access to opportunity information depending on a variety of system profile settings and role assignments. This table is organized by the different settings of the profile option *OS: Opportunity Access Privilege* as this profile option has the biggest impact on access to opportunity data.

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

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

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

The following table describes the effect of different settings for the profile listed.

OSO: Opportunity Security Check	Applies to	Description
Yes (default)	Opportunity	If set to Yes, then security check will be performed on the user. If access to opportunity details is not allowed by other profile options, then access is denied.
No	Opportunity	If set to No, then security check will not be performed. View access is given to opportunity details

The following table describes the effect of different settings for the profile listed.

OS: Privilege to Change Opportunity Owner	Applies to	Description
Yes	Opportunity	Current owner and person with this profile set to Yes can change opportunity owner.
No (default)	Opportunity	Current owner and person with this profile set to No cannot change opportunity owner.

4.8.2.3 Access to Sales Leads

The following table shows the different levels of access to lead information depending on a variety of system profile settings and role assignments. This table is organized by the different settings of the profile option *OS: Lead Access Privilege* as this profile option has the biggest impact on access to lead data.

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

There is a lead sales team in addition to a lead owner. The security for leads is similar to opportunities except that there is no Org Full (Full access by HR organization) setting for *OS: Lead Access Privilege*.

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

- If you are not a sales lead owner or an owner doesn't exist among your subordinates, then you cannot change the owner flag on the sales team.
- If the sales lead access profile is set to Full, then you can update any sales leads.
- You can reassign the ownership of a lead only if you are the lead owner or if one of the people working for you in the sales group hierarchy is the lead

owner. Implementers can grant other sales team members the ability to reassign ownership by setting the profile *OS: Privilege to Change Lead Owner* to Yes. These individuals must have write access.

- Full access flag is always checked for owner.

The following table describes the effect of different settings for the profile listed.

OS: Lead Access Privilege	Who Can View	Who Can Create	Who Can Update
Full	All employees with any role.	Employees with the Manager, Agent, and Representative roles can create a lead provided they are on the sales team for the customer. Administrator roles cannot create leads.	All employees with any role.
Prospecting	All employees with any role.	Employees with the Manager, Agent, and Representative roles can create a lead provided they are on the sales team for the customer. Administrator roles cannot create leads.	Employees with the Agent or Representative role can update the lead provided they are on the sales team with the Full Access box selected. Employees with the role of Manager and the ***OS: Manager Update Access*** set to **Update data** can update the leads accessible to subordinates. A setting of **Inherit data** means they inherit the view and update privileges of their subordinates.

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

The following table describes the effect of different settings for the profile listed.

OS: Privilege to Change Lead Owner	Applies to	Description
Yes	Leads	Current owner and person with this profile set to Yes can change lead owner.
No (default)	Leads	Current owner and person with this profile set to No cannot change lead owner.

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

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

Similarly, if a user cannot update the organization or person, then they cannot update the addresses of the organization or person.

4.8.2.5 Access by Managers and Administrators

These profile options increase the access of the sales administrator role and manager role.

The following table describes the effect of different settings for the profile listed.

OS: Sales Admin Update Access	Who Can Update
Inherit Update Read / View (default)	An employee with the 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. There are three types of access: 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. Update data: The administrator can update the same data as the manager of the group. View Data: Administrators can only view the data created by the manager's subordinates.

The following table describes the effect of different settings for the profile listed.

OS: Manager Update Access	Who Can Update
Inherit Update Read / View (default)	This profile option sets the level of access for sales team members with the role of 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: Inherit data: Inherit access privilege from subordinate. Update data: Update. View data: View data only

Please refer to the *Oracle Applications System Administrators Guide* for additional information about the effects of different settings.

4.8.3 Sample Security Setups

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

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

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

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

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

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

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

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

To do so, you set the profiles *OS: Customer Access Privilege, OS: Lead Access Privilege*, and *OS: Opportunity Access Privilege* at the responsibility level. The TeleSales Manager responsibility is set to **Full.** The TeleSales Agent responsibility is set to **Sales Team.**

When Sue Pierce logs into the application and selects the TeleSales Manager responsibility, she is granted the rights to view and modify all customer, lead, and opportunity data.

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

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

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

Case 2: Restricted Access for Both Managers and Sales Representatives

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

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

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

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

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

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

4.8.4 Overview of Setup Steps

The following topic gives an overview of the steps you will follow to setup the users, security, and reporting hierarchy for this application.

Steps

1. Replicate the reporting hierarchy within your sales organization using Resource Groups in Resource Manager. This determines how forecasting of opportunity information is aggregated. See Section 4.8.5, "Defining Resource Groups" on page 4-45.
2. Create custom responsibilities. See Section 4.8.6, "Defining Responsibilities" on page 4-47.
3. Set up the employees as users of your sales application. See Section 4.8.7, "Setting Up Employees as Users" on page 4-48.
4. Set up the system profile options which, in combination with the resource groups and roles, determine what information employees can view and modify. See Section 4.8.9, "Setting Up System Profile Options to Give Users Access" on page 4-52.
5. Import the employees you have created, give them a role, and assign them to the resource groups you have created. See Section 4.8.8, "Importing Employees and Assigning Roles and Resource Groups" on page 4-49.

4.8.5 Defining Resource Groups

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

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

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

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

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

Responsibility

Oracle Sales Administrator

Navigation

CRM Foundation > Resource Manager > Maintain Resources > Groups

Steps

1. In the Define Groups window, search for a resource group:

   a. Click **Find** on the application toolbar to open the Find Group window.

   b. Select a group name from the list of values in the Group Name field and click the **Find** button. The application populates the Results section with the group name search results.

   c. Select a group name in the Results table. The application populates the Define Groups window with the group information.

   To create a new group:

   d. Enter a group name in the Name field.

   e. Enter a brief description of the group in the Description field.

   f. Enter the effective dates for the group in the Start and End fields.

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

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

   To add each group to the group hierarchy:

   h. On the Parent Groups tab, enter the group, if any, that is above the current group in the group hierarchy.

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

i. On the Child Groups tab, enter the groups that are below the current group in the group hierarchy.

j. On the Usages tab, use the LOV to enter `Sales and TeleSales`. You must make this entry for the group to be recognized by the application.

k. Click **Save** on the toolbar.

Reference

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

4.8.6 Defining Responsibilities

All Oracle applications products are installed with predefined responsibilities. These responsibilities are specific to the application that you are implementing.

Responsibility

Oracle Sales Administrator

Navigation

CRM Foundation > Resource Manager

Steps

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

1. Create a region similar to the application function security region, ASF_FUNC_SEC_REG, by copying it.
2. Set up the value of FUNCTION_SECURITY_REGION profile to the region that you created for your application.

3. Set up the value of *OSO: Application Utility Class* profile to `oracle.apps.asf.util.OsoAppUtility.java.`

Reference

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

4.8.7 Setting Up Employees as Users

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

Responsibility

System Administrator

Navigation

Security > User > Define

Steps

1. Enter a user name and password. You are asked to reenter the password a second time.
2. Use the Person List of Values (LOV) to select the employee that will be using the user name and password.
3. Assign one or more responsibilities to the user. The available responsibilities are:
   - TeleSales Agent
   - TeleSales Marketing Agent
   - TeleSales Manager
   - TeleSales Administrator
   - Sales Online Representative
   - Sales Online Manager
4. Click **Save** in the toolbar.

4.8.8 Importing Employees and Assigning Roles and Resource Groups

Use this procedure to import employees from Oracle HRMS.

Prerequisites

You must set up the employees in HRMS first.

Responsibility

Oracle Sales Administrator

Navigation

CRM Foundation > Resource Manager > Maintain Resources > Import Resources

Steps

The Selection Criterion window appears.

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

   The employees that match your search criteria appear.
4. Select the boxes for the employees you want to import as resources into your sales application. The next step will assign a single role to each of the selected resources.
5. Click **Create Resource**.

   The Default Values window appears.
6. Use the Role LOV to select one of the available roles to assign to the resources. See Roles on page 4-27 for an explanation of role types.

   For Oracle TeleSales the available roles are:

   - TeleSales Administrator
   - TeleSales Manager
   - TeleSales Agent

   For other sales applications, the available roles are:

- Sales Manager
- Sales Administrator
- Sales Representative

Note: TeleSales roles are specific to TeleSales.

7. Click **OK**.

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

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

9. Click **Save Resource**.

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

10. To add additional roles to any of the employees perform the following steps. A TeleSales user must also have a Sales role type.

    a. Navigate to CRM Foundation > Resource Manager > Maintain Resources > Resources

    b. In the Find Resources window, click **Find**.

    c. Select the employee.

    d. Click **Resource Details**.

       The Resource window displays information about the employee.

    e. Click **New** on the toolbar.

    f. On the Role tab, use the Role Type LOV to select Sales.

    g. Use the Role LOV to select the role.

    h. Add any additional role for this employee by repeating the above two steps.

    i. Click **Save** on the toolbar and close the Resource window.

11. Assign sales groups to each employee and select the roles they are going to have in each. For each employee:

a. Navigate to CRM Foundation > Resource Manager > Maintain Resources > Resources.

b. In the Find Resources window, click **Find**.

c. Select the employee.

d. Click **Resource Details**.

   The Resource window displays information about the employee.

e. In the Groups region of the Groups tab, use the Name LOV to assign a group to the employee.

f. In the Group Member Roles region, use the Name LOV to select one or more roles for this employee in the group.

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

h. Repeat the above three steps for each group to which you want to assign the employee.

Guidelines

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

Reference

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

4.8.9 Setting Up System Profile Options to Give Users Access

Use this procedure to give your employees different levels of access to information by setting system profile options. These system profile options, in combination with the role and group each employee is assigned to, determine what information a user can view and modify.

Note: Security profile options give you a flexible way to set up data access privileges for your sales organization. However, it is possible to set profile options that create invalid data access rules in the application. For example, users with access to a customer's leads and opportunities must also have access to the customer information. You should not restrict customer access by setting *OS: Customer Access Privilege* to **Sales Team** while providing complete access to all opportunities by setting *OS: Opportunity Access Privilege* to **Full.** The application does not automatically check for this type of setting to make sure that it is valid. You must run the concurrent program *Setup Checking for Sales Applications* and view the error log to find these types of errors.

Prerequisites

Familiarity with system profiles and concurrent programs.

Responsibility

Oracle Sales Administrator

Navigation

Profiles > System

Steps

1. Set the following profile options. These apply to all sales applications. (For detailed information of available settings, see the table of system profile options provided in this guide and the explanation of lead security in Section 4.8, "Setting Up Users, Security, and Reporting Hierarchy" on page 4-26.)

   - OS: Customer Access Privilege
   - OS: Opportunity Access Privilege
   - OS: Lead Access Privilege

- OS: Privilege to Change Lead Owner
- OS: Manager Update Access
- OS: Sales Admin Update Access
- OS: Always Add Creator to Customer Sales Team
- OS: Create Organization Privilege
- OS: Create Person Privilege
- OS: Create Contact Privilege

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

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

   For Agents, Representatives, Managers, and Administrators, setting these profiles to Yes restricts access (gives view-only access to opportunity, organization, and person detail pages). Setting to No does not restrict access.

   The following three profiles control access to detail pages.

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

   Setting these profiles to Yes gives competitors and partners view-only access to customer and opportunity details:

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

3. If you are implementing Oracle Sales Online and you want to restrict the Quick Find feature to only retrieving information users can access, then set *OSO: Quick Find Security Check* to Yes. This enables security for the Quick Find feature.

4. To restrict sales application users to creating opportunities only for customers they can view set the profile *OS: Enable Customer LOV Security* set to Yes.

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

5. Under the Oracle Sales Administrator responsibility, navigate to **Concurrent Requests > Run**.

6. Run the concurrent program *Setup Checking for Sales Applications*. Enter No when the Parameters window prompts you with the question: "Only for 11*i* upgrade?".

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

4.8.10 Setting Up Default User Role and Sales Group

You can set up a default user role and sales group for each user with multiple groups and roles by setting the system profile options:

- OTS: Default User Role

Set the default, save it, and exit the System Profile Values window. Then re-enter the Profile Values window to set the next profile option.

- OTS: Default User Group

By setting a default, users no longer have to choose a role and group each time they launch the eBusiness Center (TeleSales). Users can also set this default up themselves.

4.8.11 Security Restrictions

- For Oracle TeleSales only, you can set up a default user role and sales group for employees with multiple roles and sales groups. This makes it possible for users to use the application without having to select a role and group first. See Section 4.8.10, "Setting Up Default User Role and Sales Group" on page 4-54.
- If you are using Flexible Data Security with Oracle Sales Online, the steps in this section will not affect your security settings. See Section 4.9, "Setting Up Flexible Data Security" for implementing the flexible data security model.

4.9 Setting Up Flexible Data Security

Applies to: Sales Online

While the regular security set up meets the needs of many users, the flexible data security model may be used for those with special security requirements. This model is designed to provide custom flexibility in allowing access to entities/objects (organizations, persons, contacts, and opportunities), sub-entities (organization relationships, classifications, and sales teams), and lists of values.

Please note, using flexible data security is optional.

This section includes the following topics:

- Section 4.9.1, "Overview of Flexible Data Security"
- Section 4.9.2, "Setting the Profile Option to Yes"
- Section 4.9.3, "Identifying Objects"
- Section 4.9.4, "Identifying Sub-entities"
- Section 4.9.5, "Identifying Functions and Menus"
- Section 4.9.6, "Setting Up Instance Sets"
- Section 4.9.7, "Creating a Data Grant"
- Section 4.9.8, "Providing Security to New Menus"
- Section 4.9.9, "Effects of Sub-Entity Security Settings"

4.9.1 Overview of Flexible Data Security

Terms

The basic concept behind flexible security is that each user (or responsibility) can be granted access to create, update, and view an entity or sub-entity.

- Objects (Entities)
- Sub-entity
- Functions
- Grants
- LOVs

Objects (Entities)

Within Sales Online the supported objects are:

- Opportunity
- Organization
- Person
- Contact
- Organization to Organization Relationship
- Address
- Phone

Sub-entity

A sub-entity is group of functions associated with an object (entity). For example, an organization has sub-entities including: organization relationships, organization classifications, and organization sales teams.

Functions

Each object has functions associated with it. For example:

- Create
- Update
- View

Grants

Grants are defined as the authorization given to a user to access a function. Therefore, for every object you may grant user access to zero, one, two, or three of the available options.

LOVs

Lists of Values are also included in this data security model. The list types are:

- Classification Category
- Relationship Type
- Customer Category
- Address Type

- Phone Type

Assumptions

Flexible data security may affect the performance of the application. This is dependent on the number and complexity of the rules you established for your business organization.

Reference

The *Oracle Applications System Administrators Guide* includes detailed information and set up steps for flexible data security.

4.9.2 Setting the Profile Option to Yes

Responsibility

System Administrator

Navigation

Oracle Sales Setup > System Profiles

Steps

To enable flexible security, set the site level profile *OSO: Use Flexible Data Security* to Yes. The default is No.

4.9.3 Identifying Objects

Navigation

Login to Security Administration > Click Objects > Select Oracle Sales from the Application ID drop down menu

Follow instructions as outlined in the *Oracle Applications System Administrators Guide*.

The following table describes the available Oracle Sales Online objects.

Object	Table	Display Name	Primary Key
AS_OPPORTUNITY	AS_LEADS_ALL	Opportunity	LEAD_ID
AS_ORGANIZATION	HZ_PARTIES	Organization	PARTY_ID

Object	Table	Display Name	Primary Key
AS_PERSON	HZ_PARTIES	Person	PARTY_ID
AS_CONTACT	HZ_PARTIES	Contact	PARTY_ID
AS_ORG_2_ORG_RELATIONSHIP	HZ_RELATIONSHIPS	Organization to Organization Relationship	RELATIONSHIP_ID
AS_ADDRESS	HZ_PARTY_SITES	Address	PARTY_SITE_ID
AS_PHONE	HZ_CONTACT_POINTS	Phone	CONTACT_POINT_I D
AS_LOOKUP	FND_LOOKUP_VALUES	Lookup	LOOKUP_CODE, LOOKUP_TYPE
AS_LOOKUP_TYPE	FND_LOOKUP_TYPES	Lookup Type	LOOKUP_TYPE

4.9.4 Identifying Sub-entities

After a user is granted access to the entity (object), then it must be determined which sub-entities of that object are accessible.

Each sub-entity is represented by two FND functions. One function is for determining the viewability, and the other for determining the updatability of the sub-entity.

Reference

See Section 4.9.4.1, "Examples of Sub-entity Security Setups".

4.9.4.1 Examples of Sub-entity Security Setups

This section includes some examples of setting up sub-entity security.

Example 1

If Mary has access to the entity Organizations, then the system administrator must determine if Mary will also have access to the sub-entities associated with Organizations. Can Mary view, update, and create the relationships of an organization?

Example 2

John has access to view an opportunity in which the Amount is greater $1,000. He can also view Contacts, and update Competitors and Internal Sales Team members for those opportunities.

To set John up, the System Administrator follows these guidelines:

- Remove the global grant, which is the default, and assign AS_OPPTY_VIEW and AS_OPPTY_UPDATE
- Create a new menu called CUSTOM_MENU1.
- Assign the functions, AS_OPPTY_VIEW, AS_OPPTY_CNTCT_VIEW, AS_OPPTY_CMPTR_UPDATE, AS_OPPTY_ISLSTM_UPDATE, AS_OPPTY_CMPTR_VIEW, AS_OPPTY_ISLSTM_VIEW to the menu.
- Create an instance set called OPPTY_IS_AMOUNT with the where clause "where amount > 1000" for object AS_OPPORTUNITY.
- Grant the access to John for the object AS_OPPORTUNITY, instance set = OPPTY_IS_AMOUNT, menu = CUSTOM_MENU1.

Assuming there are two opportunities with amounts greater than 1,000, when John logs in and goes to the Opportunity tab he should see those two opportunities.

John cannot update contacts or the opportunity detail page. He does have access to update competitors and internal sales team members.

Example 3

Assume you want to assign every user with Sales Super User responsibility to have view access to all Opportunities but only be able to update the contacts and sales teams for opportunities with an amount greater than one million dollars.

- Assign the seeded menu AS_OPPTY_VIEW to the responsibility "Sales Super User" with no instance set.
- Create a new menu, for example, called CUSTOM_MENU2.
- Assign the functions, AS_OPPTY_CNTCT_UPDATE and AS_OPPTY_ISLSTM_UPDATE to the menu.
- Create an instance set called OPPTY_1M_AMOUNT with the where clause "where amount > 1,000,000" for object AS_OPPORTUNITY.
- Grant the access to John for the object AS_OPPORTUNITY, instance set = OPPTY_1M_AMOUNT, menu = CUSTOM_MENU2.

Consider that there are two opportunities with amounts greater than $1,000,000 and a total of fifty opportunities. When Larry, a Sales Super User, logs in and goes to the Opportunity tab he should see all fifty opportunities. When Larry navigates to the opportunity detail page, he should see the two opportunities that meet the greater than 1,000,000 criteria. However, he will not be able to update contacts and sales team members.

Restrictions

Certain pages are read-only. These include Interactions and 360 Degree View. This means that you cannot create privileges that will allow a user to create or update these functions.

4.9.5 Identifying Functions and Menus

A *function* is the smallest unit of securable product functionality. Function definitions are registered with the security system and represent actions that can be performed on an object or on the system in general. Granting a function to users gives them permission to perform that function.

A *menu* is a named container for a set of menu entries. Each menu entry points to a function and or a submenu or both.

Table of Functions and Menus

The following is a table of function and menu definitions with their related objects. This information is necessary when assigning grants to users in later steps.

Related Object	Sub-Entity	Menu	Functions
AS_OPPORTUNIT Y	Opportunities	AS_OPPTY_CREATE	AS_OPPTY_CREATE
AS_OPPORTUNIT Y		AS_OPPTY_VIEW	AS_OPPTY_VIEW
			AS_OPPTY_LOG_VIEW
	Leads		AS_OPPTY_LEAD_VIEW
	Attachments		AS_OPPTY_ATTCH_VIEW
	Tasks		AS_OPPTY_TASK_VIEW
	Notes		AS_OPPTY_NOTE_VIEW
	Partners		AS_OPPTY_PRTNR_VIEW
	Classifications		AS_OPPTY_CLASS_VIEW
	Quotes		AS_OPPTY_QUOTE_VIEW
	External Sales Team		AS_OPPTY_ESLSTM_VIEW
	Internal Sales Team		AS_OPPTY_ISLSTM_VIEW
	Win / Loss		AS_OPPTY_CLOSE_VIEW
	Competitors		AS_OPPTY_CMPTR_VIEW
	Contacts		AS_OPPTY_CNTCT_VIEW
AS_OPPORTUNIT Y		AS_OPPTY_UPDATE	AS_OPPTY_UPDATE
			AS_OPPTY_LOG_UPDATE
	Leads		AS_OPPTY_LEAD_UPDATE
	Attachments		AS_OPPTY_ATTCH_UPDATE
	Tasks		AS_OPPTY_TASK_UPDATE
	Notes		AS_OPPTY_NOTE_UPDATE
	Partners		AS_OPPTY_PRTNR_UPDATE
	Classifications		AS_OPPTY_CLASS_UPDATE
	Quotes		AS_OPPTY_QUOTE_UPDATE
	External Sales Team		AS_OPPTY_ESLSTM_UPDATE
	Internal Sales Team		AS_OPPTY_ISLSTM_UPDATE
	Win / Loss		AS_OPPTY_CLOSE_UPDATE
	Competitors		AS_OPPTY_CMPTR_UPDATE
	Contacts		AS_OPPTY_CNTCT_UPDATE
AS_ORGANIZATI ON		AS_ORGANIZATION_CREA TE	AS_ORGANIZATION_CREATE

Related Object	Sub-Entity	Menu	Functions
AS_ORGANIZATION		AS_ORGANIZATION_VIEW	AS_ORGANIZATION_VIEW
	360 Views-Events		AS_ORGANIZATION_EVENT_VIEW
	360 Views-Campaigns		AS_ORGANIZATION_CAPGN_VIEW
	360 Views-Projects		AS_ORGANIZATION_PRJCT_VIEW
	360 Views-Returns		AS_ORGANIZATION_RETRN_VIEW
	360 Views-Products		AS_ORGANIZATION_INSTL_VIEW
	360 Views Service Requests		AS_ORGANIZATION_SRREQ_VIEW
	360 Views-Invoices		AS_ORGANIZATION_INVCE_VIEW
	360 Views-Orders		AS_ORGANIZATION_ORDER_VIEW
	Accounts		AS_ORGANIZATION_ACCNT_VIEW
	Attachments		AS_ORGANIZATION_ATTCH_VIEW
	Interactions		AS_ORGANIZATION_INRCT_VIEW
	Tasks		AS_ORGANIZATION_TASK_VIEW
	External Sales Team		AS_ORGANIZATION_ESLSTM_VIEW
	Internal Sales Team		AS_ORGANIZATION_ISLSTM_VIEW
	Notes		AS_ORGANIZATION_NOTE_VIEW
	Quotes		AS_ORGANIZATION_QUOTE_VIEW
	Opportunities		AS_ORGANIZATION_OPPTY_VIEW
	Leads		AS_ORGANIZATION_LEAD_VIEW
	Relationships		AS_ORGANIZATION_RELAT_VIEW
	Classifications		AS_ORGANIZATION_CLASS_VIEW

Related Object	Sub-Entity	Menu	Functions
AS_ORGANIZATION		AS_ORGANIZATION_UPDATE	AS_ORGANIZATION_UPDATE
	360 Views-Events		AS_ORGANIZATION_EVENT_UPDATE
	360 Views-Campaigns		AS_ORGANIZATION_CAPGN_UPDATE
	360 Views-Projects		AS_ORGANIZATION_PRJCT_UPDATE
	360 Views-Returns		AS_ORGANIZATION_RETRN_UPDATE
	360 Views-Products		AS_ORGANIZATION_INSTL_UPDATE
	360 Views Service Requests		AS_ORGANIZATION_SRREQ_UPDATE
	360 Views-Invoices		AS_ORGANIZATION_INVCE_UPDATE
	360 Views-Orders		AS_ORGANIZATION_ORDER_UPDATE
	Accounts		AS_ORGANIZATION_ACCNT_UPDATE
	Attachments		AS_ORGANIZATION_ATTCH_UPDATE
	Interactions		AS_ORGANIZATION_INRCT_UPDATE
	Tasks		AS_ORGANIZATION_TASK_UPDATE
	External Sales Team		AS_ORGANIZATION_ESLSTM_UPDATE
	Internal Sales Team		AS_ORGANIZATION_ISLSTM_UPDATE
	Notes		AS_ORGANIZATION_NOTE_UPDATE
	Quotes		AS_ORGANIZATION_QUOTE_UPDATE
	Opportunities		AS_ORGANIZATION_OPPTY_UPDATE
	Leads		AS_ORGANIZATION_LEAD_UPDATE
	Relationships		AS_ORGANIZATION_RELAT_UPDATE
	Classifications		AS_ORGANIZATION_CLASS_UPDATE
AS_PERSON		AS_PERSON_CREATE	AS_PERSON_CREATE

Related Object	Sub-Entity	Menu	Functions
AS_PERSON		AS_PERSON_VIEW	AS_PERSON_VIEW
	360 Views-Events		AS_PERSON_EVENT_VIEW
	360 Views-Campaign		AS_PERSON_CAPGN_VIEW
	360 Views-Projects		AS_PERSON_PRJCT_VIEW
	360 Views-Returns		AS_PERSON_RETRN_VIEW
	360 Views-Products		AS_PERSON_INSTL_VIEW
	360 View-Service Request		AS_PERSON_SRREQ_VIEW
	360 Views-Invoices		AS_PERSON_INVCE_VIEW
	360 Views-Orders		AS_PERSON_ORDER_VIEW
	Accounts		AS_PERSON_ACCNT_VIEW
	Attachments		AS_PERSON_ATTCH_VIEW
	Interactions		AS_PERSON_INRCT_VIEW
	Tasks		AS_PERSON_TASK_VIEW
	External Sales Team		AS_PERSON_ESLSTM_VIEW
	Internal Sales Team		AS_PERSON_ISLSTM_VIEW
	Notes		AS_PERSON_NOTE_VIEW
	Quotes		AS_PERSON_QUOTE_VIEW
	Opportunities		AS_PERSON_OPPTY_VIEW
	Leads		AS_PERSON_LEAD_VIEW
	Relationships		AS_PERSON_RELAT_VIEW
	Classifications		AS_PERSON_CLASS_VIEW

Related Object	Sub-Entity	Menu	Functions
AS_PERSON		AS_PERSON_UPDATE	AS_PERSON_UPDATE
	360 Views-Events		AS_PERSON_EVENT_UPDATE
	360 Views-Campaign		AS_PERSON_CAPGN_UPDATE
	360 Views-Projects		AS_PERSON_PRJCT_UPDATE
	360 Views-Returns		AS_PERSON_RETRN_UPDATE
	360 Views-Products		AS_PERSON_INSTL_UPDATE
	360 View-Service Request		AS_PERSON_SRREQ_UPDATE
	360 Views-Invoices		AS_PERSON_INVCE_UPDATE
	360 Views-Orders		AS_PERSON_ORDER_UPDATE
	Accounts		AS_PERSON_ACCNT_UPDATE
	Attachments		AS_PERSON_ATTCH_UPDATE
	Interactions		AS_PERSON_INRCT_UPDATE
	Tasks		AS_PERSON_TASK_UPDATE
	External Sales Team		AS_PERSON_ESLSTM_UPDATE
	Internal Sales Team		AS_PERSON_ISLSTM_UPDATE
	Notes		AS_PERSON_NOTE_UPDATE
	Quotes		AS_PERSON_QUOTE_UPDATE
	Opportunities		AS_PERSON_OPPTY_UPDATE
	Leads		AS_PERSON_LEAD_UPDATE
	Relationships		AS_PERSON_RELAT_UPDATE
	Classifications		AS_PERSON_CLASS_UPDATE
AS_CONTACT		AS_CONTACT_CREATE	AS_CONTACT_CREATE
AS_CONTACT		AS_CONTACT_VIEW	AS_CONTACT_VIEW
	Attachments		AS_CONTACT_ATTCH_VIEW
	Tasks		AS_CONTACT_TASK_VIEW
	Notes		AS_CONTACT_NOTE_VIEW
	Interactions		AS_CONTACT_INRCT_VIEW
	Classifications		AS_CONTACT_CLASS_VIEW
AS_CONTACT		AS_CONTACT_UPDATE	AS_CONTACT_UPDATE
	Attachments		AS_CONTACT_ATTCH_UPDATE
	Tasks		AS_CONTACT_TASK_UPDATE
	Notes		AS_CONTACT_NOTE_UPDATE
	Interactions		AS_CONTACT_INRCT_UPDATE
	Classifications		AS_CONTACT_CLASS_UPDATE
AS_ADDRESS		AS_ADDRESS_VIEW	AS_ADDRESS_VIEW

Related Object	Sub-Entity	Menu	Functions
AS_ADDRESS		AS_ADDRESS_UPDATE	AS_ADDRESS_UPDATE
AS_ORG_2_ORG_RELATIONSHIP		AS_OORELAT_CREATE	AS_OORELAT_CREATE
AS_ORG_2_ORG_RELATIONSHIP		AS_OORELAT_VIEW	AS_OORELAT_VIEW
	Partner Profile		AS_OORELAT_PFILE_VIEW
	Attachments		AS_OORELAT_ATTCH_VIEW
	Tasks		AS_OORELAT_TASK_VIEW
	Notes		AS_OORELAT_NOTE_VIEW
	Interactions		AS_OORELAT_INRCT_VIEW
	Classifications		AS_OORELAT_CLASS_VIEW
AS_ORG_2_ORG_RELATIONSHIP		AS_OORELAT_UPDATE	AS_OORELAT_UPDATE
	Partner Profile		AS_OORELAT_PFILE_UPDATE
	Attachments		AS_OORELAT_ATTCH_UPDATE
	Tasks		AS_OORELAT_TASK_UPDATE
	Notes		AS_OORELAT_NOTE_UPDATE
	Interactions		AS_OORELAT_INRCT_UPDATE
	Classifications		AS_OORELAT_CLASS_UPDATE
AS_PHONE		AS_PHONE_VIEW	AS_PHONE_VIEW
AS_PHONE		AS_PHONE_UPDATE	AS_PHONE_UPDATE
AS_LOOKUP_TYPE		AS_LOOKUP_CLASS_CAT_VIEW	AS_LOOKUP_CLASS_CAT_VIEW
AS_LOOKUP_TYPE		AS_LOOKUP_CLASS_CAT_UPDATE	AS_LOOKUP_CLASS_CAT_UPDATE
AS_LOOKUP		AS_LOOKUP_CUST_CAT_VIEW	AS_LOOKUP_CUST_CAT_VIEW
AS_LOOKUP		AS_LOOKUP_CUST_CAT_UPDATE	AS_LOOKUP_CUST_CAT_UPDATE
AS_LOOKUP		AS_LOOKUP_RELAT_TYPE_VIEW	AS_LOOKUP_RELAT_TYPE_VIEW
AS_LOOKUP		AS_LOOKUP_RELAT_TYPE_UPDATE	AS_LOOKUP_RELAT_TYPE_UPDATE
AS_LOOKUP		AS_LOOKUP_ADDRESS_TYPE_VIEW	AS_LOOKUP_ADDRESS_TYPE_VIEW
AS_LOOKUP		AS_LOOKUP_ADDRESS_TYPE_UPDATE	AS_LOOKUP_ADDRESS_TYPE_UPDATE

Related Object	Sub-Entity	Menu	Functions
AS_LOOKUP		AS_LOOKUP_PHONE_TYPE_VIEW	AS_LOOKUP_PHONE_TYPE_VIEW
AS_LOOKUP		AS_LOOKUP_PHONE_TYPE_UPDATE	AS_LOOKUP_PHONE_TYPE_UPDATE

4.9.6 Setting Up Instance Sets

An instance set is a group of related object instances within an object type. The set is specified as a predicate on the keys or attributes of the object type. You can create new instance sets to meet your particular business requirements. These instance sets are used to give grants in the Section 4.9.7, "Creating a Data Grant".

Navigation

Security Administration > Objects

Steps

To create a new instance set, select an object and click the **Create New Instance** button.

Follow the directions as listed in the *Oracle System Administrators Guide*.

See Also

Section 4.9.6.1, "Using Security Context to Create Instance Sets" on page 4-78

Table of Sample Instance Sets

The following are tables of sample instance sets provided by Oracle Sales Online.

AS_OPPORTUNITY

The following is a table of sample instance sets for opportunity.

Instance Set Name	Predicate	Display Name	Description
OPPTY_VIEW_ORG	&TABLE_ALIAS.ORG_ID = FND_PROFILE.Value('ORG_ID')	Opportunity View for Organization Full Access	Opportunity View for Organization Full Access
OPPTY_VIEW_REP	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Opportunity View for Sales Representative	Opportunity View for Sales Representative
OPPTY_VIEW_ST_MGR	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.SALESFORCE_ID = RM.RESOURCE_ID)	Opportunity View for Manager Sales Team Access	Opportunity View for Manager Sales Team Access
OPPTY_VIEW_ST_ADMIN	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND AAA.SALESFORCE_ID = RM.SALESFORCE_ID)	Opportunity View for Admin Sales Team Access	Opportunity View for Admin Sales Team Access
OPPTY_VIEW_AM_REP	&TABLE_ALIAS.CUSTOMER_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.SALESFORCE_ROLE_CODE = 'AM' AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Opportunity View for Account Manager (Sales Representative)	Opportunity View for Account Manager (Sales Representative)
OPPTY_VIEW_AM_MGR	&TABLE_ALIAS.CUSTOMER_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE AAA.SALESFORCE_ROLE_CODE = 'AM' AND RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.SALESFORCE_ID = RM.RESOURCE_ID)	Opportunity View for Account Manager (Manager)	Opportunity View for Account Manager (Manager)
OPPTY_VIEW_AM_ADMIN	&TABLE_ALIAS.CUSTOMER_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE AAA.SALESFORCE_ROLE_CODE = 'AM' AND RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND AAA.SALESFORCE_ID = RM.SALESFORCE_ID)	Opportunity View for Account Manager (Admin)	Opportunity View for Account Manager (Admin)

Instance Set Name	Predicate	Display Name	Description
OPPTY_UPDATE_R	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Opportunity Update for Sales Representative	Opportunity Update for Sales Representative
OPPTY_UPDATE_U_MGR	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID AAA.SALESFORCE_ID AND ((RM.PARENT_RESOURCE_ID <> RM.RESOURCE_ID) OR (RM.PARENT_RESOURCE_ID = RM.RESOURCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')))	Opportunity Update for Manager (Update)	Opportunity Update for Manager (Update)
OPPTY_UPDATE_U_ADMIN	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND ((RM.SALESFORCE_ID <>AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID')) OR (RM.SALESFORCE_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') ANDAAA.TEAM_LEADER_FLAG ='Y')))	Opportunity Update for Admin (Update)	Opportunity Update for Admin (Update)
OPPTY_UPDATE_I_MGR	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')	Opportunity Update for Manager (Inherit)	Opportunity Update for Manager (Inherit)
OPPTY_UPDATE_I_ADMIN	&TABLE_ALIAS.LEAD_ID IN (SELECT AAA.LEAD_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')	Opportunity Update for Admin (Inherit)	Opportunity Update for Admin (Inherit)

Instance Set Name	Predicate	Display Name	Description
OPPTY_UPDATE_AM_U_MGR	&TABLE_ALIAS.CUSTOMER_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALLAAA,AS_RPT_MANAGERS_V RM WHERE AAA.SALESFORCE_ROLE_CODE = 'AM' AND RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID)	Opportunity Update for Account Manager (Manager Update)	Opportunity Update for Account Manager (Manager Update)
OPPTY_UPDATE_AM_U_ADMIN	&TABLE_ALIAS.CUSTOMER_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE AAA.SALESFORCE_ROLE_CODE = 'AM' AND RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID)	Opportunity Update for Account Manager (Admin Update)	Opportunity Update for Account Manager (Admin Update)

AS_ORGANIZATION

The following is a table of sample instance sets for organization.

Instance Set Name	Predicate	Display Name	Description
ORG_VIEW_REP	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Organization View for Sales Representative	Organization View for Sales Representative
ORG_VIEW_ST_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.SALESFORCE_ID = RM.RESOURCE_ID)	Organization View for Manager Sales Team Access	Organization View for Manager Sales Team Access
ORG_VIEW_ST_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND AAA.SALESFORCE_ID = RM.SALESFORCE_ID)	Organization View for Admin Sales Team Access	Organization View for Admin Sales Team Access

Instance Set Name	Predicate	Display Name	Description
ORG_UPDATE_R	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Organization Update for Sales Representative	Organization Update for Sales Representative
ORG_UPDATE_U_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND ((RM.PARENT_RESOURCE_ID <> RM.RESOURCE_ID) OR (RM.PARENT_RESOURCE_ID = RM.RESOURCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')))	Organization Update for Manager (Update)	Organization Update for Manager (Update)
ORG_UPDATE_U_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND ((RM.SALESFORCE_ID <> AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID')) OR (RM.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.TEAM_LEADER_FLAG = 'Y')))	Organization Update for Admin (Update)	Organization Update for Admin (Update)
ORG_UPDATE_I_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Organization Update for Manager (Inherit)	Organization Update for Manager (Inherit)

Instance Set Name	Predicate	Display Name	Description
ORG_UPDATE_I_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Organization Update for Admin (Inherit)	Organization Update for Admin (Inherit)

AS_PERSON

The following is a table of sample instance sets for person.

Instance Set Name	Predicate	Display Name	Description
PER_VIEW_REP	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Person View for Sales Representative	Person View for Sales Representative
PER_ORG_CONTACT_VIEW_REP	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES'ANDREL.OBJECT_TABLE_NAME= 'HZ_PARTIES')	Person (Organization Contact) View for Sales Representative	Person (Organization Contact) View for Sales Representative
PER_VIEW_ST_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.SALESFORCE_ID = RM.RESOURCE_ID)	Person View for Manager Sales Team Access	Person View for Manager Sales Team Access

Instance Set Name	Predicate	Display Name	Description
PER_ORG_CONTACT_VIEW_ST_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES' AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.SALESFORCE_ID = RM.RESOURCE_ID)	Person (Organization Contact) View for Manager Sales Team Access	Person (Organization Contact) View for Manager Sales Team Access
PER_VIEW_ST_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND AAA.SALESFORCE_ID = RM.SALESFORCE_ID)	Person View for Admin Sales Team Access	Person View for Admin Sales Team Access
PER_ORG_CONTACT_VIEW_ST_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES' AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND AAA.SALESFORCE_ID = RM.SALESFORCE_ID)	Person (Organization Contact) View for Admin Sales Team Access	Person (Organization Contact) View for Admin Sales Team Access
PER_UPDATE_R	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Person Update for Sales Representative	Person Update for Sales Representative

Instance Set Name	Predicate	Display Name	Description
PER_ORG_CONTACT_UPDATE_R	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES' AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Person (Organization Contact) Update for Sales Representative	Person (Organization Contact) Update for Sales Representative
PER_UPDATE_U_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND ((RM.PARENT_RESOURCE_ID <> RM.RESOURCE_ID) OR (RM.PARENT_RESOURCE_ID = RM.RESOURCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')))	Person Update for Manager (Update)	Person Update for Manager (Update)
PER_ORG_CONTACT_UPDATE_U_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION', 'PERSON') AND REL.SUBJECT_TABLE_NAME = HZ_PARTIES' AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND ((RM.PARENT_RESOURCE_ID <> RM.RESOURCE_ID) OR (RM.PARENT_RESOURCE_ID = RM.RESOURCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')))	Person (Organization Contact) Update for Manager (Update)	Person (Organization Contact) Update for Manager (Update)

Instance Set Name	Predicate	Display Name	Description
PER_UPDATE_U_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND ((RM.SALESFORCE_ID <> AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID')) OR (RM.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.TEAM_LEADER_FLAG = 'Y')))	Person Update for Admin (Update)	Person Update for Admin (Update)
PER_ORG_CONTACT_UPDATE_U_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES' AND RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND ((RM.SALESFORCE_ID <> AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID')) OR (RM.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.TEAM_LEADER_FLAG = 'Y')))	Person (Organization Contact) Update for Admin (Update)	Person (Organization Contact) Update for Admin (Update)
PER_UPDATE_I_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Person Update for Manager (Inherit)	Person Update for Manager (Inherit)

Instance Set Name	Predicate	Display Name	Description
PER_ORG_CONTACT_UPDATE_I_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_MANAGERS_V RM, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES' AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Person (Organization Contact) Update for Manager (Inherit)	Person (Organization Contact) Update for Manager (Inherit)
PER_UPDATE_I_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Person Update for Admin (Inherit)	Person Update for Admin (Inherit)
PER_ORG_CONTACT_UPDATE_I_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT REL.SUBJECT_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM, HZ_PARTIES P, HZ_RELATIONSHIPS REL WHERE AAA.CUSTOMER_ID = REL.OBJECT_ID AND REL.OBJECT_ID = P.PARTY_ID AND P.PARTY_TYPE IN ('ORGANIZATION','PERSON') AND REL.SUBJECT_TABLE_NAME = 'HZ_PARTIES' AND REL.OBJECT_TABLE_NAME = 'HZ_PARTIES' AND RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID = AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Person (Organization Contact) Update for Admin (Inherit)	Person (Organization Contact) Update for Admin (Inherit)

AS_CONTACT

The following is a table of sample instance sets for contact.

Instance Set Name	Predicate	Display Name	Description
CNT_VIEW_REP	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Contact View for Sales Representative	Contact View for Sales Representative
CNT_VIEW_ST_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND AAA.SALESFORCE_ID = RM.RESOURCE_ID)	Contact View for Manager Sales Team Access	Contact View for Manager Sales Team Access
CNT_VIEW_ST_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA, AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND AAA.SALESFORCE_ID = RM.SALESFORCE_ID)	Contact View for Admin Sales Team Access	Contact View for Admin Sales Team Access
CNT_UPDATE_R	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))	Contact Update for Sales Representative	Contact Update for Sales Representative
CNT_UPDATE_U_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID =AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULl AND AAA.SALES_LEAD_ID IS NULL AND((RM.PARENT_RESOURCE_ID <> RM.RESOURCE_ID) OR (RM.PARENT_RESOURCE_ID =RM.RESOURCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y')))	Contact Update for Manager (Update)	Contact Update for Manager (Update)

Instance Set Name	Predicate	Display Name	Description
CNT_UPDATE_U_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID =AAA.SALESFORCE_ID AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND((RM.SALESFORCE_ID <> AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID')) OR(RM.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') ANDAAA.TEAM_LEADER_FLAG ='Y')))	Contact Update for Admin (Update)	Contact Update for Admin (Update)
CNT_UPDATE_I_MGR	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_MANAGERS_V RM WHERE RM.PARENT_RESOURCE_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID') AND RM.RESOURCE_ID =AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Contact Update for Manager (Inherit)	Contact Update for Manager (Inherit)
CNT_UPDATE_I_ADMIN	&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA,AS_RPT_ADMINS_V RM WHERE RM.PARENT_SALES_GROUP_ID =AS_SEC_CONTEXT.GET_ATTR_VALUE('SALES_GROUP_ID') AND RM.SALESFORCE_ID =AAA.SALESFORCE_ID AND AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL)	Contact Update for Admin (Inherit)	Contact Update for Admin (Inherit)

4.9.6.1 Using Security Context to Create Instance Sets

The package `AS_SEC_CONTEXT.GET_ATTR_VALUE` is a PL/SQL function that returns the sales group ID and the sales force ID of the user that is currently logged in. This information is used to build the "where" clause as part of the predicate when you are creating a new instance set.

The context ID initialized by the framework:

- SALESFORCE_ID: The resource ID of the logged in user.

- SALES_GROUP_ID: The ID of the sales group to which the user belongs. If a user belongs to multiple sales groups, then this ID will be that of the group that the user selected for the current session.

Example

&TABLE_ALIAS.PARTY_ID IN (SELECT AAA.CUSTOMER_ID FROM AS_ACCESSES_ALL AAA WHERE AAA.TEAM_LEADER_FLAG = 'Y' AND AAA.LEAD_ID IS NULL AND AAA.SALES_LEAD_ID IS NULL AND AAA.SALESFORCE_ID = AS_SEC_CONTEXT.GET_ATTR_VALUE('SALESFORCE_ID'))

4.9.7 Creating a Data Grant

The System Administrator creates data grants for users based on the business requirements of that user. You can assign all users, a group of users, or a single user with data grant access to a menu or function set.

The default setting, without changing any grants, is set to Global. This means that if the profile option is turned on and no further changes are made to the grants, all users have access to view, update, and create all opportunities, organizations, persons, contacts, addresses, phones, organization to organization relationships, and lookup values.

Navigation

Security Administration > Grants

See Example 1 and Example 2

Reference

For more information on grants, please refer to the *Oracle Applications System Administrators Guide*.

Please note, function grants should not be used for this application.

The following table lists examples of grants, menus, and instance sets.

Object	Menus	Instance Set
AS_OPPORTUNITY	AS_OPPTY_CREATE	Global
AS_OPPORTUNITY	AS_OPPTY_VIEW	OPPTY_VIEW_REP OPPTY_VIEW_ST_MGR
AS_OPPORTUNITY	AS_OPPTY_UPDATE	OPPTY_UPDATE_R

Object	Menus	Instance Set
AS_ORGANIZATION	AS_ORGANIZATION_CREATE	Global
AS_ORGANIZATION	AS_ORGANIZATION_UPDATE	ORG_VIEW_REP ORG_VIEW_ST_MGR
AS_PERSON	AS_PERSON_CREATE	Global
AS_PERSON	AS_PERSON_VIEW	PER_VIEW_REP PER_VIEW_ST_MGR PER_ORG_CONTACT_VIEW_REP PER_ORG_CONTACT_VIEW_ST_MGR
AS_PERSON	AS_PERSON_UPDATE	PER_UPDATE_R
AS_CONTACT	AS_CONTACT_CREATE	Global
AS_CONTACT	AS_CONTACT_VIEW	CNT_VIEW_REP CNT_VIEW_ST_MGR
AS_CONTACT	AS_CONTACT_UPDATE	CNT_UPDATE_R
AS_ADDRESS	AS_ADDRESS_VIEW	Global
AS_ADDRESS	AS_ADDRESS_UPDATE	Global
AS_PHONE	AS_PHONE_VIEW	Global
AS_PHONE	AS_PHONE_UPDATE	Global
AS_ORG_2_ORG_RELATIONSHIP	AS_OORELAT_CREATE	Global
AS_ORG_2_ORG_RELATIONSHIP	AS_OORELAT_VIEW	Global
AS_ORG_2_ORG_RELATIONSHIP	AS_OORELAT_UPDATE	Global
AS_LOOKUP_TYPE	AS_LOOKUP_CLASS_CAT_VIEW	Global
AS_LOOKUP_TYPE	AS_LOOKUP_CLASS_CAT_UPDATE	Global
AS_LOOKUP	AS_LOOKUP_CUST_CAT_VIEW	Global
AS_LOOKUP	AS_LOOKUP_CUST_CAT_UPDATE	Global
AS_LOOKUP	AS_LOOKUP_RELAT_TYPE_VIEW	Global
AS_LOOKUP	AS_LOOKUP_RELAT_TYPE_UPDATE	Global
AS_LOOKUP	AS_LOOKUP_ADDRESS_TYPE_VIEW	Global
AS_LOOKUP	AS_LOOKUP_ADDRESS_TYPE_UPDATE	Global

Object	Menus	Instance Set
AS_LOOKUP	AS_LOOKUP_PHONE_TYPE_VIEW	Global
AS_LOOKUP	AS_LOOKUP_PHONE_TYPE_UPDATE	Global

Example 1

For user JOHN with full access to create, view, or update any opportunities, assign global instance access for all opportunity menu as shown in the table below.

Grantee Type	Grantee Key	Menu Name	Object Name	Instance Set Name
USER	JOHN	AS_OPPTY_CREATE	AS_OPPORTUNITY	Null
USER	JOHN	AS_OPPTY_VIEW	AS_OPPORTUNITY	Null
USER	JOHN	AS_OPPTY_UPDATE	AS_OPPORTUNITY	Null

Example 2

A user MARY with opportunity Sales Team view access and Read Only Manager Update profile will have the following grants. (She can still create any opportunity.) See the table below for setting details.

Grantee Type	Grantee Key	Menu Name	Object Name	Instance Set Name
USER	MARY	AS_OPPTY_CREATE	AS_OPPORTUNITY	Global
USER	MARY	AS_OPPTY_VIEW	AS_OPPORTUNITY	OPPTY_VIEW_REP
USER	MARY	AS_OPPTY_VIEW	AS_OPPORTUNITY	OPPTY_VIEW_ST_MGR
USER	MARY	AS_OPPTY_VIEW	AS_OPPORTUNITY	OPPTY_VIEW_AM_REP
USER	MARY	AS_OPPTY_VIEW	AS_OPPORTUNITY	OPPTY_VIEW_AM_MGR
USER	MARY	AS_OPPTY_UPDATE	AS_OPPORTUNITY	OPPTY_UPDATE_R

Table With Regular Security Settings vs. Flexible Data Security Settings

Below is a table that shows the mapping between the original security settings and the corresponding flexible data security grants needed.

Functionality	Menu Name	Setting	Grants
Opportunity Create	AS_OPPTY_CREATE	Admin (cannot create opportunity)	No grant
		Manager or Sales Representative (can create opportunity)	Global grant
Opportunity View	AS_OPPTY_VIEW	Global Full	Global grant
		Org Full	OPPTY_VIEW_ORG
		Prospecting	Global grant
		Sales Team (Manager or Sales Representative)	OPPTY_VIEW_REP, OPPTY_VIEW_ST_MGR, OPPTY_VIEW_AM_REP, OPPTY_VIEW_AM_MGR
		Sales Team (Admin)	OPPTY_VIEW_REP, OPPTY_VIEW_ST_MGR, OPPTY_VIEW_AM_REP, OPPTY_VIEW_AM_ADMIN
Opportunity Update	AS_OPPTY_UPDATE	Global Full	Global grant
		Org Full	OPPTY_VIEW_ORG
		Prospecting/Sales Team with read-only	OPPTY_UPDATE_R
		Prospecting/Sales Team with inherit (Manager)	OPPTY_UPDATE_I_MGR
		Prospecting/Sales Team with inherit (Admin)	OPPTY_UPDATE_I_ADMIN
		Prospecting/Sales Team with update (Manager)	OPPTY_UPDATE_U_MGR, OPPTY_UPDATE_AM_U_MGR
		Prospecting/Sales Team with update (Admin)	OPPTY_UPDATE_U_ADMIN, OPPTY_UPDATE_AM_U_ADMIN
Organization Create	AS_ORGANIZATION_ CREATE	Admin (cannot create organization)	No grant
		Manager or Sales Representative (can create organization)	Global grant
Organization View	AS_ORGANIZATION_ VIEW	Full	Global grant
		Prospecting	Global grant
		Sales Team (Manager or Sales Representative)	ORG_VIEW_REP, ORG_VIEW_ST_MGR
		Sales Team (Admin)	ORG_VIEW_REP, ORG_VIEW_ST_ADMIN

Functionality	Menu Name	Setting	Grants
Organization Update	AS_ORGANIZATION_ UPDATE	Full	Global grant
		Prospecting / Sales Team with read-only	ORG_UPDATE_R
		Prospecting / Sales Team with inherit (Manager or Sales Representative)	ORG_UPDATE_I_MGR
		Prospecting / Sales Team with inherit (Admin)	ORG_UPDATE_I_ADMIN
		Prospecting / Sales Team with update (Manager or Sales Representative)	ORG _UPDATE_U_MGR
		Prospecting / Sales Team with update (Admin)	ORG_UPDATE_U_ADMIN
Person Create	AS_PERSON_CREATE	Admin (cannot create person)	No grant
		Manager or Sales Representative (can create person)	Global grant
Person View	AS_PERSON_VIEW	Full	Global grant
		Prospecting	Global grant
		Sales Team (Manager or Sales Representative)	PER_VIEW_REP, PER_VIEW_ST_MGR, PER_ORG_CONTACT_VIEW_REP, PER_ORG_CONTACT_VIEW_ST_M GR
		Sales Team (Admin)	PER_VIEW_REP, PER_VIEW_ST_ADMIN, PER_ORG_CONTACT_VIEW_REP, PER_ORG_CONTACT_VIEW_ST_AD MIN
Person Update	AS_PERSON_UPDATE	Full	Global
		Prospecting / Sales Team with read-only	PER_UPDATE_R, PER_ORG_CONTACT_UPDATE_I_R
		Prospecting / Sales Team with inherit (Manager or Sales Representative	PER_UPDATE_I_MGR, PER_ORG_CONTACT_UPDATE_I_M GR
		Prospecting / Sales Team with inherit (Admin)	PER_UPDATE_I_ADMIN, PER_ORG_CONTACT_UPDATE_I_A DMIN
		Prospecting / Sales Team with update (Manager of Sales Representative)	PER_UPDATE_U_MGR, PER_ORG_CONTACT_UPDATE_U_ MGR
		Prospecting / Sales Team with update (Admin)	PER_UPDATE_U_ADMIN, PER_ORG_CONTACT_UPDATE_U_ ADMIN

Functionality	Menu Name	Setting	Grants
Contact Create	AS_CONTACT_CREATE	Admin (cannot create contact)	No grant
		Manager or Sales Representative (can create contact)	Global grant
Contact View	AS_CONTACT_VIEW	Full	Global grant
		Prospecting	Global grant
		Sales Team (Manager or Sales Representative)	CNT_VIEW_REP, CNT_VIEW_ST_MGR
		Sales Team (Admin)	CNT_VIEW_REP, CNT_VIEW_ST_ADMIN
Contact Update	AS_CONTACT_UPDATE	Full	Global grant
		Prospecting / Sales Team with read-only	CNT_UPDATE_R
		Prospecting / Sales Team with inherit (Manager or Sales Representative)	CNT_UPDATE_I_MGR
		Prospecting / Sales Team with inherit (Admin)	CNT_UPDATE_I_ADMIN
		Prospecting / Sales Team with update (Manager or Sales Representative)	CNT_UPDATE_U_MGR
		Prospecting / Sales Team with update (Admin)	CNT_UPDATE_U_ADMIN

4.9.8 Providing Security to New Menus

If you have created a new menu (see Section 4.19.5, "Create Your Own Menu Using Page You Have Created") and want to add security functionality to that menu, this section is applicable.

Overview

The mapping between the menu entry and the security functions is maintained in Property Manager. Each pair of view and update functions corresponds to a cue card entry. The key is the concatenation of:

```
subentitysecurity.<object type>.<object attribute>.<view/update>
```

<object type> is the cue card object while <object attribute> is the cue card attribute. <view / update> is *view* for view function and *update* for update function. And the value will be the corresponding function of the cue card entry.

The System Administrator can change the Value to point to a different FND function, but should not change the Key. The Administrator can add new entries for custom sub-entity pages.

Responsibility

System Administrator

Navigation

Click Setting > System > Advanced > ASF application

A list of key / value pairs is displayed.

Organization

Below is the table of the default sub-entity security related data of the property manager.

Key	Value
subentitysecurity.ORGZN.CLASS.view	AS_ORGANIZATION_CLASS_VIEW
subentitysecurity.ORGZN.CLASS.update	AS_ORGANIZATION_CLASS_UPDATE
subentitysecurity.ORGZN.RELAT.view	AS_ORGANIZATION_RELAT_VIEW
subentitysecurity.ORGZN.RELAT.update	AS_ORGANIZATION_RELAT_UPDATE
subentitysecurity.ORGZN.LEADS.view	AS_ORGANIZATION_LEAD_VIEW
subentitysecurity.ORGZN.LEADS.update	AS_ORGANIZATION_LEAD_UPDATE
subentitysecurity.ORGZN.OPPTY.view	AS_ORGANIZATION_OPPTY_VIEW
subentitysecurity.ORGZN.OPPTY.update	AS_ORGANIZATION_OPPTY_UPDATE
subentitysecurity.ORGZN.QUOTE.view	AS_ORGANIZATION_QUOTE_VIEW
subentitysecurity.ORGZN.QUOTE.update	AS_ORGANIZATION_QUOTE_UPDATE
subentitysecurity.ORGZN.NOTES.view	AS_ORGANIZATION_NOTE_VIEW
subentitysecurity.ORGZN.NOTES.update	AS_ORGANIZATION_NOTE_UPDATE
subentitysecurity.ORGZN.ISLSTM.view	AS_ORGANIZATION_ISLSTM_VIEW
subentitysecurity.ORGZN.ISLSTM.update	AS_ORGANIZATION_ISLSTM_UPDATE
subentitysecurity.ORGZN.ESLSTM.view	AS_ORGANIZATION_ESLSTM_VIEW
subentitysecurity.ORGZN.ESLSTM.update	AS_ORGANIZATION_ESLSTM_UPDATE
subentitysecurity.ORGZN.TASKS.view	AS_ORGANIZATION_TASK_VIEW
subentitysecurity.ORGZN.TASKS.update	AS_ORGANIZATION_TASK_UPDATE
subentitysecurity.ORGZN.INRCT.view	AS_ORGANIZATION_INRCT_VIEW
subentitysecurity.ORGZN.INRCT.update	AS_ORGANIZATION_INRCT_UPDATE
subentitysecurity.ORGZN.ATTCH.view	AS_ORGANIZATION_ATTCH_VIEW

Key	Value
subentitysecurity.ORGZN.ATTCH.update	AS_ORGANIZATION_ATTCH_UPDATE
subentitysecurity.ORGZN.ACCNT.view	AS_ORGANIZATION_ACCNT_VIEW
subentitysecurity.ORGZN.ACCNT.update	AS_ORGANIZATION_ACCNT_UPDATE
subentitysecurity.ORGZN.ORDER.view	AS_ORGANIZATION_ORDER_VIEW
subentitysecurity.ORGZN.ORDER.update	AS_ORGANIZATION_ORDER_UPDATE
subentitysecurity.ORGZN.INVCE.view	AS_ORGANIZATION_INVCE_VIEW
subentitysecurity.ORGZN.INVCE.update	AS_ORGANIZATION_INVCE_UPDATE
subentitysecurity.ORGZN.SRVCE.view	AS_ORGANIZATION_SRVCE_VIEW
subentitysecurity.ORGZN.SRVCE.update	AS_ORGANIZATION_SRVCE_UPDATE
subentitysecurity.ORGZN.PRDCT.view	AS_ORGANIZATION_PRDCT_VIEW
subentitysecurity.ORGZN.PRDCT.update	AS_ORGANIZATION_PRDCT_UPDATE
subentitysecurity.ORGZN.RETRN.view	AS_ORGANIZATION_RETRN_VIEW
subentitysecurity.ORGZN.RETRN.update	AS_ORGANIZATION_RETRN_UPDATE
subentitysecurity.ORGZN.PRJCT.view	AS_ORGANIZATION_PRJCT_VIEW
subentitysecurity.ORGZN.PRJCT.update	AS_ORGANIZATION_PRJCT_UPDATE
subentitysecurity.ORGZN.CMPGN.view	AS_ORGANIZATION_CAPGN_VIEW
subentitysecurity.ORGZN.CMPGN.update	AS_ORGANIZATION_CAPGN_UPDATE
subentitysecurity.ORGZN.EVENT.view	AS_ORGANIZATION_EVENT_VIEW
subentitysecurity.ORGZN.EVENT.update	AS_ORGANIZATION_EVENT_UPDATE

Person

Below is the table of the default sub-entity security related data of the property manager.

Key	Value
subentitysecurity.CNTCT.CLASS.view	AS_PERSON_CLASS_VIEW
subentitysecurity.CNTCT.CLASS.update	AS_PERSON_CLASS_UPDATE
subentitysecurity.CNTCT.RELAT.view	AS_PERSON_RELAT_VIEW
subentitysecurity.CNTCT.RELAT.update	AS_PERSON_RELAT_UPDATE
subentitysecurity.CNTCT.LEADS.view	AS_PERSON_LEAD_VIEW
subentitysecurity.CNTCT.LEADS.update	AS_PERSON_LEAD_UPDATE
subentitysecurity.CNTCT.OPPTY.view	AS_PERSON_OPPTY_VIEW

Key	Value
subentitysecurity.CNTCT.OPPTY.update	AS_PERSON_OPPTY_UPDATE
subentitysecurity.CNTCT.QUOTE.view	AS_PERSON_QUOTE_VIEW
subentitysecurity.CNTCT.QUOTE.update	AS_PERSON_QUOTE_UPDATE
subentitysecurity.CNTCT.NOTES.view	AS_PERSON_NOTE_VIEW
subentitysecurity.CNTCT.NOTES.update	AS_PERSON_NOTE_UPDATE
subentitysecurity.CNTCT.ISLSTM.view	AS_PERSON_ISLSTM_VIEW
subentitysecurity.CNTCT.ISLSTM.update	AS_PERSON_ISLSTM_UPDATE
subentitysecurity.CNTCT.ESLSTM.view	AS_PERSON_ESLSTM_VIEW
subentitysecurity.CNTCT.ESLSTM.update	AS_PERSON_ESLSTM_UPDATE
subentitysecurity.CNTCT.TASKS.view	AS_PERSON_TASK_VIEW
subentitysecurity.CNTCT.TASKS.update	AS_PERSON_TASK_UPDATE
subentitysecurity.CNTCT.INRCT.view	AS_PERSON_INRCT_VIEW
subentitysecurity.CNTCT.INRCT.update	AS_PERSON_INRCT_UPDATE
subentitysecurity.CNTCT.ATTCH.view	AS_PERSON_ATTCH_VIEW
subentitysecurity.CNTCT.ATTCH.update	AS_PERSON_ATTCH_UPDATE
subentitysecurity.CNTCT.ACCNT.view	AS_PERSON_ACCNT_VIEW
subentitysecurity.CNTCT.ACCNT.update	AS_PERSON_ACCNT_UPDATE
subentitysecurity.CNTCT.ORDER.view	AS_PERSON_ORDER_VIEW
subentitysecurity.CNTCT.ORDER.update	AS_PERSON_ORDER_UPDATE
subentitysecurity.CNTCT.INVCE.view	AS_PERSON_INVCE_VIEW
subentitysecurity.CNTCT.INVCE.update	AS_PERSON_INVCE_UPDATE
subentitysecurity.CNTCT.SRVCE.view	AS_PERSON_SRVCE_VIEW
subentitysecurity.CNTCT.SRVCE.update	AS_PERSON_SRVCE_UPDATE
subentitysecurity.CNTCT.PRDCT.view	AS_PERSON_PRDCT_VIEW
subentitysecurity.CNTCT.PRDCT.update	AS_PERSON_PRDCT_UPDATE
subentitysecurity.CNTCT.RETRN.view	AS_PERSON_RETRN_VIEW
subentitysecurity.CNTCT.RETRN.update	AS_PERSON_RETRN_UPDATE
subentitysecurity.CNTCT.PRJCT.view	AS_PERSON_PRJCT_VIEW
subentitysecurity.CNTCT.PRJCT.update	AS_PERSON_PRJCT_UPDATE
subentitysecurity.CNTCT.CMPGN.view	AS_PERSON_CAPGN_VIEW
subentitysecurity.CNTCT.CMPGN.update	AS_PERSON_CAPGN_UPDATE
subentitysecurity.CNTCT.EVENT.view	AS_PERSON_EVENT_VIEW

Key	Value
subentitysecurity.CNTCT.EVENT.update	AS_PERSON_EVENT_UPDATE

Contact

Since the organization contact and person contact are considered the same object under the security model, but different objects under the cue card structure, we will repeat the mapping twice for the cue card objects.

Below is the table of the default sub-entity security related data of the property manager.

Key	Value
subentitysecurity.ORGCNT.CLASS.view	AS_CONTACT_CLASS_VIEW
subentitysecurity.ORGCNT.CLASS.update	AS_CONTACT_CLASS_UPDATE
subentitysecurity.ORGCNT.NOTES.view	AS_CONTACT_NOTE_VIEW
subentitysecurity.ORGCNT.NOTES.update	AS_CONTACT_NOTE_UPDATE
subentitysecurity.ORGCNT.TASKS.view	AS_CONTACT_TASK_VIEW
subentitysecurity.ORGCNT.TASKS.update	AS_CONTACT_TASK_UPDATE
subentitysecurity.ORGCNT.INRCT.view	AS_CONTACT_INRCT_VIEW
subentitysecurity.ORGCNT.INRCT.update	AS_CONTACT_INRCT_UPDATE
subentitysecurity.ORGCNT.ATTCH.view	AS_CONTACT_ATTCH_VIEW
subentitysecurity.ORGCNT.ATTCH.update	AS_CONTACT_ATTCH_UPDATE
subentitysecurity.CNTCNT.CLASS.view	AS_CONTACT_CLASS_VIEW
subentitysecurity.CNTCNT.CLASS.update	AS_CONTACT_CLASS_UPDATE
subentitysecurity.CNTCNT.NOTES.view	AS_CONTACT_NOTE_VIEW
subentitysecurity.CNTCNT.NOTES.update	AS_CONTACT_NOTE_UPDATE
subentitysecurity.CNTCNT.TASKS.view	AS_CONTACT_TASK_VIEW
subentitysecurity.CNTCNT.TASKS.update	AS_CONTACT_TASK_UPDATE
subentitysecurity.CNTCNT.INRCT.view	AS_CONTACT_INRCT_VIEW
subentitysecurity.CNTCNT.INRCT.update	AS_CONTACT_INRCT_UPDATE
subentitysecurity.CNTCNT.ATTCH.view	AS_CONTACT_ATTCH_VIEW
subentitysecurity.CNTCNT.ATTCH.update	AS_CONTACT_ATTCH_UPDATE

Organization to Organization Relationship

Below is the table of the default sub-entity security related data of the property manager.

Key	Value
subentitysecurity.ORGORG.CLASS.view	AS_OORELAT_CLASS_VIEW
subentitysecurity.ORGORG.CLASS.update	AS_OORELAT_CLASS_UPDATE
subentitysecurity.ORGORG.NOTES.view	AS_OORELAT_NOTE_VIEW
subentitysecurity.ORGORG.NOTES.update	AS_OORELAT_NOTE_UPDATE
subentitysecurity.ORGORG.TASKS.view	AS_OORELAT_TASK_VIEW
subentitysecurity.ORGORG.TASKS.update	AS_OORELAT_TASK_UPDATE
subentitysecurity.ORGORG.INRCT.view	AS_OORELAT_INRCT_VIEW
subentitysecurity.ORGORG.INRCT.update	AS_OORELAT_INRCT_UPDATE
subentitysecurity.ORGORG.ATTCH.view	AS_OORELAT_ATTCH_VIEW
subentitysecurity.ORGORG.ATTCH.update	AS_OORELAT_ATTCH_UPDATE
subentitysecurity.ORGORG.PRPRF.view	AS_OORELAT_PFILE_VIEW
subentitysecurity.ORGORG.PRPRF.update	AS_OORELAT_PFILE_UPDATE

Opportunity

Below is the table of the default sub-entity security related data of the property manager.

Key	Value
subentitysecurity.OPPTY.CMPTR.view	AS_OPPTY_CMPTR_VIEW
subentitysecurity.OPPTY.CMPTR.update	AS_OPPTY_CMPTR_UPDATE
subentitysecurity.OPPTY.CNTCT.view	AS_OPPTY_CNTCT_VIEW
subentitysecurity.OPPTY.CNTCT.update	AS_OPPTY_CNTCT_UPDATE
subentitysecurity.OPPTY.ISLSTM.view	AS_OPPTY_ISLSTM_VIEW
subentitysecurity.OPPTY.ISLSTM.update	AS_OPPTY_ISLSTM_UPDATE
subentitysecurity.OPPTY.ESLSTM.view	AS_OPPTY_ESLSTM_VIEW
subentitysecurity.OPPTY.ESLSTM.update	AS_OPPTY_ESLSTM_UPDATE
subentitysecurity.OPPTY.CLASS.view	AS_OPPTY_CLASS_VIEW
subentitysecurity.OPPTY.CLASS.update	AS_OPPTY_CLASS_UPDATE
subentitysecurity.OPPTY.LEADS.view	AS_OPPTY_LEAD_VIEW

Key	Value
subentitysecurity.OPPTY.LEADS.update	AS_OPPTY_LEAD_UPDATE
subentitysecurity.OPPTY.QUOTE.view	AS_OPPTY_QUOTE_VIEW
subentitysecurity.OPPTY.QUOTE.update	AS_OPPTY_QUOTE_UPDATE
subentitysecurity.OPPTY.CLOSE.view	AS_OPPTY_CLOSE_VIEW
subentitysecurity.OPPTY.CLOSE.update	AS_OPPTY_CLOSE_UPDATE
subentitysecurity.OPPTY.PRTCH.view	AS_OPPTY_PRTNR_VIEW
subentitysecurity.OPPTY.PRTCH.update	AS_OPPTY_PRTNR_UPDATE
subentitysecurity.OPPTY.NOTES.view	AS_OPPTY_NOTE_VIEW
subentitysecurity.OPPTY.NOTES.update	AS_OPPTY_NOTE_UPDATE
subentitysecurity.OPPTY.TASKS.view	AS_OPPTY_TASK_VIEW
subentitysecurity.OPPTY.TASKS.update	AS_OPPTY_TASK_UPDATE
subentitysecurity.OPPTY.ATTCH.view	AS_OPPTY_ATTCH_VIEW
subentitysecurity.OPPTY.ATTCH.update	AS_OPPTY_ATTCH_UPDATE

If a new custom sub-entity page is defined by creating additional entries for the cue card of main entity (opportunity, organization, person, relationship), Administrators should define new FND functions for these customized new sub-entities as well. Administrators should also define mapping of the cue card entries to the corresponding FND functions for these customized new sub-entities.

4.9.9 Effects of Sub-Entity Security Settings

This section covers the effects of the flexible data security settings discussed in the previous sections.

When a user clicks a submenu, also referred to as a cue card, the security settings check for view and update privileges of that cue card attribute/object. If view privilege is denied, an error message is displayed to notify the user. Based on the update privilege, some sub-entities will render the Update button accordingly. Some sub-entities have their own security model and therefore will ignore the provided update privilege. Other sub-entities are read-only pages and therefore will also ignore the provided update privilege.

Organization

Below is a table listing of the sub-entities for each main entity and the corresponding action against the provided privilege.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
Classifications	Yes	Do not render Update button and print out warning message if update privilege is not granted. If update privilege is granted, the sub-entity security will be observed.
Relationships	Yes	Do not render Update button and print out warning message if update privilege is not granted. If update privilege is granted, the sub-entity security will be observed.
Leads	Yes	Ignore the privilege because this sub-entity has its own security model.
Opportunities	Yes	Ignore the privilege because this sub-entity has its own security model.
Quotes	No	Ignore the privilege because this page is read-only.
Notes	Yes	Ignore the privilege because this sub-entity has its own security model.
Internal Sales Team	No	Do not render Update button and print out warning message if update privilege is not granted.
External Sales Team	No	Do not render Update button and print out warning message if update privilege is not granted.
Tasks	Yes	Ignore the privilege because this sub-entity has its own security model.
Interactions	No	Ignore the privilege because this page is read-only.
Attachments	No	Ignore the privilege.
Accounts	No	Ignore the privilege.
360 Views - Orders	No	Ignore the privilege because this page is read-only.
360 Views - Invoices	No	Ignore the privilege because this page is read-only.
360 Views - Service Requests	No	Ignore the privilege because this page is read-only.
360 Views - Products	No	Ignore the privilege because this page is read-only.
360 Views - Returns	No	Ignore the privilege because this page is read-only.
360 Views - Projects	No	Ignore the privilege because this page is read-only.
360 Views - Campaigns	No	Ignore the privilege because this page is read-only.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
360 Views - Events	No	Ignore the privilege because this page is read-only.

Person

Below is a table listing of the sub-entities for each main entity and the corresponding action against the provided privilege.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
Classifications	Yes	Do not render Update button and print out warning message if update privilege is not granted. If update privilege is granted, the sub-entity security will be observed.
Relationships	Yes	Do not render Update button and print out warning message if update privilege is not granted. If update privilege is granted, the sub-entity security will be observed.
Leads	Yes	Ignore the privilege because this sub-entity has its own security model.
Opportunities	Yes	Ignore the privilege because this sub-entity has its own security model.
Quotes	No	Ignore the privilege because this page is read-only.
Notes	Yes	Ignore the privilege because this sub-entity has its own security model.
Internal Sales Team	No	Do not render Update button and print out warning message if update privilege is not granted.
External Sales Team	No	Do not render Update button and print out warning message if update privilege is not granted.
Tasks	Yes	Ignore the privilege because this sub-entity has its own security model.
Interactions	No	Ignore the privilege because this page is read-only.
Attachments	No	Ignore the privilege.
Accounts	No	Ignore the privilege.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
360 Views - Orders	No	Ignore the privilege because this page is read-only.
360 Views - Invoices	No	Ignore the privilege because this page is read-only.
360 Views - Service Requests	No	Ignore the privilege because this page is read-only.
360 Views - Products	No	Ignore the privilege because this page is read-only.
360 Views - Returns	No	Ignore the privilege because this page is read-only.
360 Views - Projects	No	Ignore the privilege because this page is read-only.
360 Views - Campaigns	No	Ignore the privilege because this page is read-only.
360 Views - Events	No	Ignore the privilege because this page is read-only.

Contact

Below is a table listing of the sub-entities for each main entity and the corresponding action against the provided privilege.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
Classifications	Yes	Do not render Update button and print out warning message if update privilege is not granted. If update privilege is granted, the sub-entity security will be observed.
Interactions	No	Ignore the privilege because the page is read-only.
Notes	Yes	Ignore the privilege because this sub-entity has its own security model.
Tasks	Yes	Ignore the privilege because this sub-entity has its own security model.
Attachments	No	Ignore the privilege.

Organization to Organization Relationship

Below is a table listing of the sub-entities for each main entity and the corresponding action against the provided privilege.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
Classifications	Yes	Do not render Update button and print out warning message if update privilege is not granted. If update privilege is granted, the sub-entity security will be observed.
Interactions	No	Ignore the privilege because the page is read-only.
Notes	Yes	Ignore the privilege because this sub-entity has its own security model.
Tasks	Yes	Ignore the privilege because this sub-entity has its own security model.
Attachments	No	Ignore the privilege.
Partner Profile	No	Do not render Update button and print out warning message if update privilege is not granted.

Opportunity

Below is a table listing of the sub-entities for each main entity and the corresponding action against the provided privilege.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
Contacts	No	Do not render Update button and print out warning message if update privilege is not granted.
Competitors	No	Do not render Update button and print out warning message if update privilege is not granted.
Win/Loss	No	Do not render Update button and print out warning message if update privilege is not granted.
Internal Sales Team	No	Do not render Update button and print out warning message if update privilege is not granted.

Sub-entity	Has Independent Security Model?	Action Against Update Privilege
External Sales Team	No	Do not render Update button and print out warning message if update privilege is not granted.
Quotes	No	Do not render Update button and print out warning message if update privilege is not granted.
Classifications	No	Do not render Update button and print out warning message if update privilege is not granted.
Partners	No	Ignore the privilege because the page is read-only.
Notes	Yes	Ignore the privilege because this sub-entity has its own security model.
Tasks	Yes	Ignore the privilege because this sub-entity has its own security model.
Attachments	No	Ignore the privilege.
Leads	Yes	Ignore the privilege because the page is read-only.

Notes About Security

The following section lists some important notes about flexible data security.

- If you have previously set up the regular security model but you have decided to implement the flexible data security model, the existing security profile settings will not be migrated to the new security model.
- With the regular security model, user security settings override the responsibility level and site level settings. However, under the flexible data security model, every rule is union-ed together, this overriding of settings is not feasible.
- Within the flexible data security model the idea of "current responsibility" does not apply. If a user has more than one responsibility, the API will check the access for all the user’s responsibilities. Therefore, a user is permitted to access the same set of instances regardless of the current responsibility.
- With the flexible data security model, primary addresses and phone should always be both viewable and updatable. Some pages show the primary addresses for parties and the query is retrieving the address from the denormalized columns of the party table. Security check is not feasible for the addresses displayed.

4.10 Setting Up Contact List Management

Applies to: Sales Online

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

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

See Also

Section 4.10.1, "Creating Custom Filters"

Steps

Setting up contact lists consists of the following steps:

- Run the concurrent program *Purge Deleted Lists*. See also Section B.1, "Running Concurrent Programs" and Section B.2, "Table of Concurrent Programs" on page B-2.
- All profiles are shipped with default values. There are no mandatory profiles to be set in this step.

The following table is a summary of the default values shipped with the seeded data.

Profile Name	Profile User Name	Usage	Default
ASF_CLSHT_USER_COMMENTS_LENGTH	OSO: Call Sheet Comment Length	The length of truncation of notes in View Comments column of Call Sheet table.	20
ASF_CLSHT_DEFAULT_TASK_PRIVATE_FLAG	OSO: Call Sheet Default Task Private Flag	The default task private flag when a quick task is to be created.	Y
ASF_CLSHT_USER_COMMENT_ONLY	OSO: Call Sheet User Comments Only	Whether only notes created by the current user or all notes created, for this contact, should be shown.	N
ASF_CLSHT_USER_TASKS_ONLY	OSO: Call Sheet User Tasks Only	Whether only tasks owned by the current user or all tasks should be shown.	N

Profile Name	Profile User Name	Usage	Default
ASF_CLSHT_CHECK_ACCESS	OSO: Check Call Sheet Access	If the value is Y, access will be checked and contacts that the rep does not have access to will not appear in the call sheet. Otherwise, we will show all entries in that list.	N
	OSO: Create a list with filter conditions	If set to No, a contact list will be created manually by default. This profile is also available from the Profiles > Customer page.	No
ASF_LIST_DEFAULT_PUBLIC_FLAG	OSO: List Creation Default Public Flag	If a list is created, it will be public by default on the List Creation page.	N
ASF_LIST_PRIMARY_ADDR_ONLY	OSO: List Entries Show Primary Address Only	If set to Y, only the primary address of the contact is shown in list entry tables.	N
ASF_LIST_MIN_PURGE_AGE_IN_DAYS	OSO: List Purge Minimum Number of Days	Minimum age of list in days before its entries can be purged.	10
ASF_LIST_DEFAULT_ADDRESS_STATUS	OSO: List Query Default Address Status	Default address status radio button value in Address Filter page. The default value will be ignored if no Country is picked on that page.	A (A/I/B)
ASF_LIST _DEFAULT_CONTACT_STATUS	OSO: List Query Default Contact Status	Default contact status radio button value in Contact General Filter page.	A (A/I/B)
ASF_LIST_DEFAULT-RELATION_OBJ_TYPE	OSO: List Query Default Relationship Type	Whether by default contacts for organizations or for persons are to be queried.	ORG (ORG/PER)
ASF_CLSHT_NUM_OF_DAYS_WEEKLY	OSO: Number of Days in Call Sheet Weekly Calendar	How many days to be shown in weekly calendar.	5
ASF_CLSHT_START_DAY_WEEKLY	OSO: The Starting Day in Call Sheet Weekly Calendar	The starting day of the week in the weekly calendar.	Monday (Sun-Sat)
JTF_TASK_DEFAULT_TASK_PRIORITY	Task Manager: Default Task Priority	The default task priority when a quick task is to be created.	n/a
JTF_TASK_DEFAULT_TASK_STATUS	Task Manager: Default Task Status	The default task status when a quick task is to be created.	n/a
JTF_TASK_DEFAULT_TASK_TYPE	Task Manager: Default Task Type	The default task type when a quick task is to be created.	n/a

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

Steps

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

   The Find System Profile Values window appears.

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

   The profiles are displayed in the System Profile Values window.

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

The following lookups are included for contact list management:

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

4.10.1 Creating Custom Filters

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

Applies to: Sales Online

Responsibility

System Administrators can create custom filters using three steps:

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

Steps

1. Registration of a Filter Page:

   a. When a new filter page is created, an entry in the FND Lookup `ASF_LIST_QUERY_FILTERS` will need to be created. The code of that entry will be a unique identifier for the filter section, e.g., “ADDRESS”. The meaning will be a displayable name, like “Address Filter”. This will be used as the page title and the filter condition type in the List Properties page.

   b. Also a new FND function needs to be created. That function’s HTML call should be “`asfListQueryMain.jsp?LISTQCODE=<lookup code defined above>`”. This function needs to be under the menu trees for responsibilities of this application. Then customer needs to define an AK attribute, whose prompt is the code of this function. This prompt needs to be added to `ASF_FUNC_SEC_REG` AK region as a region item. Afterwards, the system administrator needs to use the cue-card Administration page to make that new page appear in the List Filters cue-card.

   c. Create a property for ASF application in Oracle JTF’s property management pages. The property name should be "`list.queryFilters.<lookup code defined above>`". It should have one value "`CLASS$<class name>`". That class name should be the full class name of a class which implements `oracle.app.asf.list.ListQueryFIlter` interface.

2. Section JSP:

   Each filter section JSP must satisfy the following requirements.

   a. Logic relationship between different filter pages is “AND”.

   b. All HTML form elements should be named as `<section name>.OBJ.<fieldname>`.

   c. Section name must be prefixed with “asfListFlt”. So a possible field could have a name “`asfListFltTransaction.OBJ.amount`”. Each filter page needs to have a unique section name.

d. There must be a hidden field called `<section name>.OBJ.LISTQCODE`. The content of the field has to be the code of the entry in FND Lookup `ASF_LIST_QUERY_FILTERS` for that filter page.

e. Customer will only need to provide the filter page which renders their filters. All filter pages will share same main and render JSP pages.

3. VO Java Class:

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

   a. Provide information about the filter, e.g., JSP file name.

   b. Based on the value that is in the HTML request, SQL segments will be appended. It should be implemented in this way so that if all fields relevant to a table do not have a value, that table should not even appear in the FROM clause.

   c. Two SQL segments should be generated in this class: database table names and alias for FROM clause, and conditions in WHERE clause. The generated WHERE clause piece will be appended with the other WHERE clauses connected by “AND”.

   This interface will have the following methods:

   - public void initialize (javax.servlet.jsp.PageContext pageContext, javax.servlet.http.HttpServletRequest request) throws java.lang. Exception: Initialize a ListQueryFilter class instance with current PageContext and a request, from which all data in requests can be obtained.

   - public void initialize (javax.servlet.jsp.PageContext pageContext, String queryType) throws java.lang. Exception: Initialize a ListQueryFilter class instance with the current PageContext instance, and a query type name. This type is the code in the FND Lookup entry for this filter page. With the query type, saved QueryParameters can be retrieved from JTT’s personalization schema. Within this method, `oracle.apps.asf.list.ListQueryManager class`, which takes a PageContext instance in its constructor, can be used. This method is used to modify filter conditions for an existing list. It is not required to be implemented for this release.

   - public static String getJSPFileName()

     Return the name of filter section’s JSP file name, like “asfListQueryPersFlt.jsp”.

- public static String getFunctionName()

  Return the name of filter section's FND function name, like "ASF_LIST_QUERY_PERS".

- public static String getListQueryCode()

  Return the code defined in ASF_LIST_QUERY_FILTERS lookup for this page, like "ASF_LIST_QUERY_PERS".

- public String getFromClause();

  A part of FROM clause to be generated, based on filter conditions in request or saved queries. The returned string should be like this: " XXX_SOME_TABLE xst, XXX_ANOTHER_TABLE xat". It should never return null. It can return an empty string.

- public String getWhereClause();

  A part of WHERE clause to be generated, based on filter conditions in request or saved queries. The returned string should be like this: "AND xst.PARTY_ID = REL.SUBJECT_ID AND xat.TRANSACTION_ID = xst.TRANS_ID". It should never return null. It can return an empty string. Only tables appeared in getFromClause(), HZ_PARTIES (PER) and HZ_RELATIONSHIPS (REL) can be used. The returned string should start with AND, if it's not empty.

- public oracle.apps.jtf.personalize.QueryParameter[] getQueryParameters();

  An array of JTT's QueryParameter instances to be generated, based on filter conditions in request or saved queries. Those QueryParameters will be saved in JTT's personalization schema later. Within this method, oracle.apps.asf.list.ListQueryManager class can be used to generate QueryParameter instances. If a condition uses operator IN, the limitation on the length of a condition value may be a problem. To work around it, one IN condition can be separated to many "IN" conditions.

- public QueryParameter convertToDisplay(String QueryParameter);

  Each program that implements this interface has the duty to resolve prompts and format value. Each filter condition has an application column name, like jobTitleCode. When this condition is saved, this name will be used as the parameterName of QueryParameter. However, when the condition is displayed in the List Properties page, the column name needs to be meaningful, and even translated. We do not restrict by which means this prompt resolution shall be implemented. In Oracle Sales Online, we will use AK region / region items to do it. Also, the parameterValue of this

QueryParameter will be a code, like “ANALYST”. When we display this filter condition, we will need to display it as “Job Title Type = Analyst”. The corresponding meaning of that lookup entry needs to be used for display purpose. Another situation may be to format a number or a date. The format should be of the current user, instead of the user who applied filter conditions. As the result, we store application column name, raw data, and lookup code in the database. When they are displayed, this method should solve the prompt, format data, and retrieve lookup meaning. The converted prompt will be stored as parameterName in the returned QueryParameter, and lookup meaning or formatted data will be stored as parameterValue in the returned QueryParameter.

Other Settings

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

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

4.11 Setting Up Lead Management

Applies to: Sales Online, TeleSales

Leads management is a Marketing module that enables users to capture, evaluate, and distribute leads for follow up.

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

4.12 Importing Leads

Applies to: Sales Online, TeleSales

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

- Party Type
- Customer Name or First Name / Last Name

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

4.13 Setting Up Opportunities and Forecasting

Applies to: Sales Online, TeleSales

Setting up opportunities and forecasting consists of:

4.13.1 Setting Up Opportunity and Forecasting Profiles

Opportunity and forecasting classifications are governed by the following profiles.

Navigation

Profiles > System

Responsibility

Oracle Sales Administrator

HTML Navigation

Profile > Forecast or Opportunity

Responsibility

Oracle Sales Online Super User

The following opportunity and forecasting profiles determine how Oracle Sales Online and Oracle TeleSales products function.

Upgrade Note

While previous versions allowed tracking opportunity columns at the header and line level (status, close date, sales stage, win probability, and sales channel), the 11*i* version tracks at the header level only.

See Also

Setting Up Data for Opportunity Aging By Status Report

Steps

The following table outlines the profiles that you can set to meet your business requirements.

Profile Name	Description	Default
OS: Address Required for Opportunity	Customer address required for opportunity.	No
OS: Address Required for Organization	Customer address required for opportunity.	No
OS: Address Required for Person	Customer address required for opportunity.	No

Profile Name	Description	Default
OS: Address Required for Sales Lead	Customer address required for opportunity.	No
OS: Allow Updating Frozen Opportunities	When set to yes, users can update frozen opportunities.	Yes
OS: Compensation Sales Credit Type	Compensation Sales Credit Type (mandatory)	
OS: Competitor Required for Opportunity	Key competitor field allows you to enter a single competitor at the opportunity level as the key competitor. The list of values for the field are derived from the Competitor Products entered using Oracle Marketing. If set to Yes, this is a required field when creating an opportunity.	No
OS: Copy Opportunity Default Prefix	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.	Copy of
OS: Daily Conversion Type	Currency conversion type used for daily conversion rates.	
OS: Date Mapping Type of a Period for Pseudo Period Rates	Indicates whether the first or last date of the period is used for calculating pseudo period rates.	
OS: Default Close Date Days	Default Opportunity Close Date days (Value + Current Date = Opportunity Close Date)	150
OS: Default Opportunity Sales Stage (Required)	Default Sales Stage	Stage 1
OS: Default Opportunity Status	Default Opportunity Status	Preliminary
OS: Default Opportunity Win Probability (Required)	Default Opportunity Win Probability	10
OS: Default Period Type for Currency Conversion (Required)		
OS: Default Sales Channel	Default Sales Channel	Direct
OS: Defaulting Primary Customer Address to Opportunity	Defaulting primary customer address to opportunity.	No
OS: Display Purchase Line Sub Total	If set to Yes, will display subtotal by interest type.	No

Profile Name	Description	Default
OS: Enable Tracking Opportunity History Data	Controls when and how the logs are created for the table AS_LEADS_ALL. It is recommended that this profile be set to Yes in order to capture the opportunity history data and store it in the table AS_LEADS_LOG when an opportunity is created or updated.	No
OS: Enable Tracking Purchase Line History Data	Controls when and how the logs are created for the table AS_LEAD_LINES_ALL.	No
OS: Enable Tracking Sales Credits History Data	Controls when and how the logs are created for the table AS_SALES_CREDITS.	No
OS: Forecast Sales Credit Type	Sets the default forecast sales credit type	
OS: Generate Opportunity System Notes	Determines whether or not notes are generated when parts of the opportunity change.	Yes
OS: Inventory Category Integration	Flag to populate Inventory categories in Oracle Sales	
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. 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.	Allow with prompt
OS: Maximum Roll Days for Converting Amount	Maximum Roll Days for Converting Amount if no conversion rate for a day.	
OS: Opportunity Probability Link	Determines whether a warning or an error is given if the win probability amount does not fall within the sales stage probabilities. The warning is turned on by default.	
OS: Opportunity Sales Credit Enforced Sales Team Definition	Opportunity Sales Credit Enforced Sales Team Definition	
OS: Privilege to Change Opp Owner	Privilege to change the opportunity owner.	No
OS: Sales Methodology	Sales methodology	
OS: Sales Team Creator Keep Flag	Default keep flag for sales team creator.	

Profile Name	Description	Default
OS: Time Frame for Opportunity Logs	It is recommended that this profile be set to: None, Day, Hour, or Minute. If not set to one of these values, the opportunity status aging reports will not generate accurate data for the status ages (number of days the opportunity stayed in a particular status).	None
OSO: Display Bubble Train		
OSO: Display Opportunity Competitors in Detail		
OSO: Display Purchase Line Subtotal	Display purchase line sub total in opportunity detail page.	No
OSO: Enable Lead Share (obsolete)	Display Lead Share button	
OSO: Enable Quote		
OSO: Oracle Internal		
OSO: Use Product Category LOV	Display Product Category column as LOV in opportunity purchase item table. If the profile value is No this column will be displayed as a drop down list.	No

Forecasting Profiles

The following table list forecasting related profiles.

Profile Name	Description	Default
OS: Forecast Calendar (Required)	The name of the calendar being used to manage forecasts.	
OS: Forecast Category		
OS: Use Forecast Materialized View	If set to yes, materialized views will be used for forecasting.	
OS: Allow Opportunity Forecast by Product Category	If set to Yes, opportunities will display on the worksheet with the product categories that make up the opportunity by default. If set to No, the opportunity worksheet will not show the product category levels of the opportunity.	
OSO: Default Forecast Currency	Set the default currency used for forecasting.	
OSO: Default Forecast Period Type	Set the default period used for forecasting.	

Profile Name	Description	Default
OSO: Default Forecast Worksheet Lines	Choose to default worksheet lines to zero or pipeline.	
OSO: Display Opportunity Worksheet Grand Totals	Choose to display worksheet grand totals.	
OSO: Display Subordinate Current Pipeline	Choose to display subordinate current pipeline.	
OSO: Forecast Calendar Month	Choose the forecast calendar month.	
OSO: Forecast Max Generate Months	Set the maximum number of months generated when generating multiple forecasts.	
(obsolete) OSO: Store Opportunities After Aggregation Due to Forecast Threshold	If set to Y, then the opportunity amount on the threshold line is a hyperlink. Click the link to view all the opportunities within the threshold.	n/a
OSO: Use Product Category LOV	Determines if a list of values or drop down menu will be used to select a product category on the opportunity detail page. If set to Yes, application will use a list of values. If set to No, application will use a drop down list. Using a list of values may have a positive impact on the speed of the application.	

Setting Up Data for Opportunity Aging By Status Report

Use the following steps:

1. Set the profile value *OS: Enable Tracking Opportunity History Data* to Yes. This enables the opportunity history data to be captured and stored in the table AS_LEADS_LOG when an opportunity is created or updated. The default values is No.
2. Set the profile value *OS: Time Frame for Opportunity Logs* to one of the following values: None or Day. The default value is None.
3. Run the concurrent program *Initial Load of Opportunity Log Tables*. This will populate the existing opportunity data in the opportunity history table.
4. Run the concurrent program *Refresh of Opportunity Status Aging Summary Table.* The data for "days in status" in the Opportunity Aging by Status report is based on the last time this concurrent program was run. Running this concurrent program allows the user to collect the status history data for the report.

4.13.2 Creating Win Probabilities

Win probabilities are used to calculate weighted pipeline amounts (opportunity amount multiplied by win probability).

There is a set of predefined Win Probabilities included with the application. You may choose not to use the predefined set and create customized win probabilities of your own. Or, you can use both the predefined set and additional customized Win Probabilities.

Use the following procedure to define or modify Win Probabilities.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Opportunity > Win Probability

Responsibility

Oracle Sales Online Super User

Steps

The Win Probabilities page opens.

1. To find a win probability:
   - a. Enter the win probability number in the Win Probability field.
   - b. Optionally, enter the Meaning.
   - c. Click **Search**.
2. To create a new probability:
   - a. Click in a **Win Probability** field in a new row. This is a required field.
   - b. Enter a Value between 0 and 100.
   - c. Enter or change the information in the **Meaning** field.
   - a. Select a Start Date in the **From** field by clicking the Calendar icon. This is a required field.

3. Optionally, enter an End Date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
4. Click the Enabled box to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the user's interface.
5. Click **Update** to save your work.

4.13.3 Defining or Modifying Sales Stages

There is a set of predefined Sales Stages included with the application. You may choose not to use the predefined set and create customized Sales Stages of your own. Or, you can use both the predefined set and additional customized Sales Stages.

Use the following procedure to define or modify Sales Stages.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Opportunity > Sales Stage

Responsibility

Oracle Sales Online Super User

Steps

The Sales Stages Window appears.

1. To find an existing Sales Stage:
   a. Enter the sales stage name in the Name field.
   b. Optionally, enter a Description.
   c. Click **Search**.
2. To enter a new Sales Stage:
   a. Click in a **Name** field in a new row. This is a required field.

b. Enter a description

c. Enter a minimum and a maximum win probability value for this stage in the **Min** and **Max** fields. These are required fields.

d. Select a start date in the **From** field by clicking the Calendar icon and choosing a date. This is a required field.

e. Optionally, select an end date for the **To** field. If an end date is selected, then the Sales Stage will be disabled after that date.

3. Click the **Enabled** box to enable the Sales Stage. If the **Enabled** box is not checked, then the Sales Stage will not be enabled.

4. Click **Update** to save your work.

4.13.4 Setting Up Sales Methodology

Every time a sales representative has a potential opportunity, the sales representative follows a series of steps before closing the sale. This process is referred to as a Sales Methodology and the specific steps are referred to as Sales Stages. Each sales stage creates a set of tasks, mandatory or optional, to be performed by the sales representative in accordance with the Sales Methodology selected. However, sales representatives are 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 uses to calculate the planned end date. If not used, the planned end date and planned start date are the same as the system date:

- DAY (day)
- WK (week)
- HR (hour)
- MIN (minute)
- MTH (month)
- YR (year)
- CN (century)

If you use only these Unit of Measure codes, then you do not need to make any modifications. However, if you use any other Unit of Measure, then you must modify the CHECK_DURATION procedure in the workflow package

AS_SALES_METH_WF to make sure that the start and end dates are correctly calculated. You can find this workflow package with the file name AS/patch/115/sql/asxsmtws.pls (spec) and asxsmtwb.pls (body). Use the example in the file to make your change. If you do not make this modification, then the application does not calculate start and end dates. Instead, it creates a note informing the user of the problem.

Profiles that govern behavior when using sales methodologies are:

- OS: Create Tasks Flag

  Used to disable automatic creation of tasks throughout the sales methodology work flow.

- OS: Regenerate Methodology Tasks

  Determines whether to regenerate sales methodology tasks for iterations of sales stage regression and progression.

- OS: Sales Methodology

  Used to set the default sales methodology at the site, application, or user level. The profile *OS: Regenerate Methodology Tasks* can only work for sales methodologies that have the *Create Tasks for All Stages* flag set to No.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Opportunity > Sales Methodology

Responsibility

Oracle Sales Online Super User

Steps

The Sales Methodology Summary page opens.

1. Click **Create**.

   The Sales Methodology Create page opens.

2. Enter a name for the sales methodology. This is a required field.
3. Enter a description. This is an optional field.
4. Select Effective From date by clicking the Calendar icon and choosing a date. This is a required field.
5. Select Effective To date by clicking the Calendar icon and choosing dates.
6. Select the Create Tasks for All Sales Stages box to create all the tasks for all sales stages when the sales methodology is selected for an opportunity. If the flag is not selected, then tasks are created for only those sales stages selected by the opportunity.
7. Enter the Sequence that with which you want the sales stage to follow. This is a required field.
8. Select a Sales Stage from the drop down list. This is a required field.
9. Optionally, select a Task Template Group from the drop down list.
10. Select a Minimum Win Probability from the drop down list. This is a required field.
11. Select a Maximum Win Probability from the drop down list. This is a required field.
12. Click **Create**.

Please note, if the sales methodology is being used by an opportunity, you can add new sales stages to the methodology but cannot modify the existing sales stages.

4.13.5 Setting Up the Calendar

You must set up a calendar for forecasting. Define a calendar that represents your organizations fiscal cycles.

Forms Navigation

Old Setup > Opportunities > Calendar

Forms Responsibility

Oracle Sales Administrator

Steps

1. Navigate to **Old Setup > Opportunities > Calendar > Types** and define your period types. For example, month, quarter, and year.
2. Navigate to **Old Setup > Opportunities > Calendar > Accounting** and define your accounting calendar.

Refer to the *Oracle General Ledger User Guide* for more information.

4.13.6 Defining Credit Types in Order Management

Forecast and other credit types need to be set up for use in Oracle Sales Online. Use the following procedure to define credit types.

Forms Navigation

Order Management > Sales Credit Type

Forms Responsibility

Oracle Sales Administrator

Steps

The Sales Credit Type window appears.

1. Enter the user defined Forecast Credit Type name and description in the appropriate fields.
2. Select the **Quota** box if the forecast credit type applies to revenue quota sales credit that you assign to salespeople. This means if it is forecastable.
3. Select the **Enabled** box to activate the forecast credit type.
4. Enter values in profile options.
5. Switch responsibility to System Administrator, and choose **Profiles > System Admin**.
6. Query ***OS: Forecast Sales Credit Type*** and enter the value that you want to use for Forecast Sales Credits. The value must have the quota box selected.
7. Query ***OS: Compensation Sales Credit Typ****e* to set compensation sales credits. The quota box should be deselected.
8. Save your work.

4.13.7 Setting Up Opportunity Status

There is a set of predefined statuses included with the application. You may choose not to use the predefined set and create customized statuses of your own. Or, you can use both the predefined set and additional customized statuses.

Use the following procedure to define Opportunity Status.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Opportunity > Status Codes

Responsibility

Oracle Sales Online Super User

Steps

1. To search for a Status Code:
   a. Enter the Status Code.
   b. Enter the Meaning
   c. Enter the Description.
2. To create a new Status Code:
   a. Click the **Create** button.
   b. Enter a Status Code.
   c. Enter a Meaning.
   d. Enter a Description.
   e. Select the Enabled box to activate the opportunity status.
   f. Select the Open box to signify whether the opportunity is open or closed. If the box is selected, it means that the opportunity is open. Conversely, if the box is not selected, it means that the opportunity is closed and the transaction requires a close reason to be entered.

g. Select the Include in Forecast box to include the status in forecasts.

h. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate box.

i. The Win Loss Indicator region indicates whether the deal has been won, lost, or neither. If the open flag is unchecked, then the choices are won, lost, or neither.

j. Click **Create**.

3. Click **Update** to save your work.

4.13.8 Setting Up Interest Types

Interest Types can be used to classify your customers (organizations and people), opportunities, and purchases in a number of ways. An interest type can represent any classification of products.

The Interest Type classification has three layers:

- Interest Type
    - Primary Interest Code
        - Secondary Interest Code

Use the following procedure to define Interest Types.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Sales Category > Interest Types

Responsibility

Oracle Sales Online Super User

Steps

The Interest Types page opens.

1. To search for an Interest Type:
   a. Select a type from the drop down list.
   b. Enter a description.
   c. Check all applicable boxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead / Opportunity Classification, Expected Purchase, Globally Enabled). Only interest types with both the Expected Purchase and Globally Enabled boxes selected will be able to load to inventory category.
   d. Click **Search**.
2. To create a new Interest Type:
   a. Select the first blank Type field and enter the name of the new interest type. This is a required field.
   b. Optionally, enter a description.
   c. Check all applicable boxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead / Opportunity Classification, Expected Purchase, Globally Enabled).

   Note: Sales Online does **not** use interest types to classify customers. Sales Online uses the Trading Community Architecture (TCA) Customer Classification lookup. See the Lookup section of this document.

   d. Select the Globally Enabled box to indicate that the classification is to be activated throughout the entire implementation.

      You can create an interest type without enabling it at either the global or organization level, however, this interest type will not be available for use. The intent is to be able to create interest types that can be enabled at a later time.
3. Click **Update** to save your work.

   Please note, you cannot delete interest types because an interest type may be related to transaction records.

4.13.9 Setting Up Interest Codes

For every interest type you can have two levels of interest codes: primary and secondary. If you are defining interest types to classify your company's products, use the primary code to identify large groupings of products. For example, for a computer company you might use the primary codes computer, peripherals, connectors, printers, and so on. You might then use the secondary codes for product families: desktops, laptops, modems, ink-jet printers.

Use the following procedure to modify and create Interest Codes.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Sales Category > Interest Code

Responsibility

Oracle Sales Online Super User

Steps

The Interest Codes page opens.

1. To search for an Interest Code:
   a. Select an interest type from the drop down list.
   b. Click **Search**.
2. To create a new Primary Interest Code:
   a. Enter the interest code for the interest type you want to set up. This is a required field.
   b. Enter a description.
   c. Select the Enabled box, if applicable.
3. To create a new Secondary Interest Code:
   a. Click the Primary Code link.

   b. Enter the interest code.
   c. Enter a description.
   d. Select the Enabled box, if applicable.
4. Click **Update** to save your work.

4.13.10 Setting Up Plan Element Mapping

In order for sales personnel to be able to estimate their commissions based on their submitted product category worksheet forecasts, interest types and codes must be mapped to Plan Elements in Oracle Incentive Compensation.

One Plan Element can be mapped to one or more interest type / primary interest code / secondary interest code.

Plan element mapping is required for using Income Planner.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Sales Category > Plan Element Mapping

Responsibility

Oracle Sales Online Super User

Prerequisites

Plan elements must be set up in Oracle Incentive Compensation. Please refer to the *Oracle Incentive Compensation User Guide* for more information.

Steps

1. To search for a plan element mapping:
   a. Enter the plan element.
   b. Select the mapping type from the drop down list.
   c. Click **Search**.

2. To create a new plan element mapping:

   a. Select the first blank Plan Element field and select the plan element you want to map from the drop down list. This is a required field.

   b. From the second column, select the Mapping Type from the drop down list. This is a required field.

      * Map quota to primary interest code - if you want to map the plan element to a primary code.

      * Map quota to secondary interest code - if you want to map the plan element to a secondary code.

      * Map quota to interests type - if you want to map the plan element to an interest type.

   c. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.

   d. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using % as a wildcard, and click Go.

3. Click **Update** to save your work.

4.13.11 Loading Inventory Categories

You must set up Inventory Categories to use Oracle Inventory and other ERP modules.

Use this procedure to set up and load Inventory Categories.

Note: You can load only those interest types that have both the Expected Purchase and Globally Enabled boxes selected.

Prerequisites

Only interest types with both the Expected Purchase and Globally Enabled boxes selected will be able to load to inventory category.

Steps

1. Navigate to **Old Setup > System Profiles**.

2. Using the Profiles form, set the *OS: Inventory Category Integration* profile value to Yes.

3. Navigate to **Concurrent Requests > Run**.
4. Using the Submit Requests form in the Concurrent Requests menu, run the concurrent program *Load Interest Types and Codes to Inventory Categories*. This program creates the Inventory Categories.
5. Map each inventory item to an inventory category under the Oracle Sales and Marketing Category Set.

   This must be done manually by using Oracle Inventory screens, for details please refer to *Oracle Inventory User's Guide*.

> **Note:** You can map an item to only one category in a given category set. This is a restriction from Oracle Inventory.

4.13.12 Setting Up Forecast Categories

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

You can add or modify forecast category from the Administration tab.

- Section 4.13.12.1, "Modify an Existing Forecast Category"
- Section 4.13.12.2, "Add a Forecast Category"

4.13.12.1 Modify an Existing Forecast Category

Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

Steps

1. Modify information.
2. Click **Update**.

4.13.12.2 Add a Forecast Category

Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

Steps

1. In the first blank line on the Forecast Category summary table, enter a new Forecast Category Name. This is a required field.
2. Click the Calendar icon and select a Start Date. This is a required field.
3. Click the Calendar icon and select an End Date.
4. Click **Update**.

4.13.13 Setting Up Forecast Category Mapping

Forecast categories are used to categorize a group of product categories for the purpose of forecasting.

Use the following procedure to set up Forecast Categories.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Forecast > Forecast Sales Category Mapping

Responsibility

Oracle Sales Online Super User

Steps

The Forecast Sales Categories page opens.

1. To search for a Forecast Sales Category:
   a. Select a Forecast Category Name from the drop down list.
   b. Click **Search**.
2. To create a new Sales Category Value:

   a. In the first blank Interest Type field, select an interest type from the drop down list. This is a required field.
   b. Select a Start Date by clicking the Calendar icon. This is a required field.
   c. Select an End Date by clicking the Calendar icon. This is a required field.
3. Click **Update** to save your work.

You can forecast only when the forecast dates fall within the forecast category dates.

4.13.14 Setting Up Budget/Revenue

The Budget/Revenue set up is used to govern the Forecast reports, to compare forecast and pipeline amounts to the allocated budget and actual revenue amounts. You can enter data or load data from a file.

Prerequisites

None

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Responsibility

Oracle Sales Online Super User

4.13.15 Searching for an Existing Budget and Revenue Entry

To search for an existing budget and revenue entry, follow these steps:

Steps

1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.

4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.

4.13.16 Entering New Budget and Revenue Amounts

To enter new budget and revenue amounts, follow these steps:

Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. Select the Sales Group from the drop down list. This is a required field.
2. Select a Period Type from the drop down list. This is a required field.
3. Select a Period Name from the drop down list. This is a required field.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.
6. Enter the budget amount.
7. Enter actual revenue amount.
8. Select a currency from the drop down list. This is a required field if amount is entered.
9. Click **Update** to save your work.
10. Click the **Sales Group Name** link to view details and enter data for the next level of subordinates.

4.13.17 Upload Budget/Revenue 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.

This file should be a comma separated text file with each column enclosed in double quotes. Each line in the file should correspond to one row of data.

Example file format: "period name", "sales group number", "salesperson number", "budget", "revenue", "currency"

Example for sales group: "Q1-01", "40", "(The salesperson number is blank)", "680000", "200000000", "USD"

Example for a salesperson: "Sep-01", "50", "12018", "120,000.20", "1,854,200.30", "HKD"

3. Click **Upload**.

At the completion of the upload process, a message with the log file name is displayed. The log file is generated on the server in a directory located by the Oracle parameter `utl_file_dir in init.ora` file.

4.14 Setting Up Multiple Currencies

Applies to: Sales Online, TeleSales

The multiple currency features of your sales application enable your organization to enter sales opportunities and forecasts in different currencies. The application automatically converts them to a single currency of your choice when summing up forecasts and opportunity purchases in the pipeline.

Your sales application calculates currency conversion for individual opportunity purchases based upon an estimate of the actual conversion rate for 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, then on the forecast main page the currency is converted all the time. But, on the opportunity worksheet and the product category worksheet, currency amounts are not displayed as converted when you view a subordinate's forecast.

Setting up multiple currencies requires:

- Section 4.14.1, "Setting Up Currency Codes" on page 4-126
- Section 4.14.2, "Setting Up Calendar Types" on page 4-127
- Section 4.14.3, "Setting Up the Accounting Calendar" on page 4-128
- Section 4.14.4, "Setting Up the Default Currency and Selecting the Calendar" on page 4-129
- Section 4.14.5, "Setting Up Profile for Positive and Negative Number Format for Currency" on page 4-130
- Section 4.14.6, "Setting Up Type Mapping" on page 4-130
- Section 4.14.7, "Setting Profile Options for Multiple Currency" on page 4-131
- Section 4.14.8, "Setting Up Reporting Currency" on page 4-131
- Section 4.14.9, "Entering GL Daily Conversion Rates" on page 4-132
- Section 4.14.10, "Entering Currency Conversion Dates for Periods (Pseudo Period Rates)" on page 4-134
- Section 4.14.10.1, "Defining Conversion Rates for Periods" on page 4-134
- Section 4.14.11, "Run Concurrent Programs" on page 4-135

4.14.1 Setting Up Currency Codes

Forms Navigation

Application > Currency

Forms Responsibility

System Administrator

Steps

1. Enter a code.
2. Enter a name.
3. Enter a description.
4. Enter the issuing territory.
5. Enter a symbol.
6. Enter Precision.
7. Enter Extended Precision.
8. Enter the minimum accountable unit.
9. Enter the currency derivation.
10. Enter the effective dates.
11. Select the Enabled box.

Make sure that the Enabled box is selected if you want to use the currency in Oracle Sales Online.

4.14.2 Setting Up Calendar Types

Forecast calendar types are used in forecasting.

Follow these steps to modify or create calendar types.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > General > Globalization > Calendar Type

Responsibility

Oracle Sales Online Super User

Steps

1. To search for calendar types:
   a. Select a year type from the drop down list.
   b. Enter a period type.
   c. Click **Search**.
2. To create a new calendar type:
   a. In the first blank Period Type field, enter the period type you want to create. This is a required field.
   b. Enter the number of periods per year (between 1 and 366 days). This is a required field.
   c. Select a year type from the drop down list. This is a required field.
   d. Optionally, enter a description.
3. Click **Update** to save your work.

4.14.3 Setting Up the Accounting Calendar

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > General > Globalization > Accounting Calendar

Responsibility

Oracle Sales Online Super User

Steps

1. To search for an existing Accounting Calendar:
   a. Select a calendar from the drop down list. This is a required field.
   b. Optionally, enter a start date.

c. Optionall, enter an end date.

d. Optionally, enter a subject.

e. Click **Search**.

2. To create a new accounting calendar:

   a. Either click the **Create** button or in the first blank Prefix field, enter a prefix for the accounting calendar you want to create. This is the prefix for that period (e.g., Jan for January). This is a required field.

   b. Select a type from the drop down list. The type of period for the line (e.g., month). This is a required field.

   c. Enter a year. The year the period falls into. This is a required field.

   d. Enter a quarter. The quarter of the year that the period falls into. This is a required field.

   e. Enter a number. The sequential number of the line in the given year. This is a required field.

   f. Select a From and To Date by clicking the Calendar icon. These are the start and end dates of the line. These are required fields.

   g. Enter a name for the calendar. This is the name for the period that appears in the application. This is a required field.

   h. 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.

4.14.4 Setting Up the Default Currency and Selecting the Calendar

Set up the default currency for your implementation.

Forms Navigation

Profiles > System

Forms Responsibility

Oracle Sales Administrator

Steps

1. Using the Profiles form, set the following profiles:
   - OSO: Default Forecast Currency
   - OS: Preferred Reporting Currency
2. Click **Save** on the toolbar.
3. In *OS: Forecast Calendar*, select the calendar you want to use from those you have defined in the previous step.

4.14.5 Setting Up Profile for Positive and Negative Number Format for Currency

Forms Navigation

Profiles > System

Forms Responsibility

Oracle Sales Administrator

Steps

1. Login as System Administrator.
2. Choose **Profiles.**
3. Chose **System.**
4. Set Currency: Negative Format = <XXX>
5. Set Currency: Positive Format = XXX

4.14.6 Setting Up Type Mapping

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > General > Globalization > Type Mapping

Responsibility

Oracle Sales Online Super User

Steps

1. Select the same calendar you selected in the profile option *OS: Forecast Calendar.*
2. In the first blank Period Type field, select a period type for 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.
3. Select the Conversion Type from the drop down list. This is a required field.
4. Enter a description.
5. Select the **Updatable** and **Deletable** boxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).

4.14.7 Setting Profile Options for Multiple Currency

Forms Navigation

Profiles > System

Forms Responsibility

Oracle Sales Administrator

Set the following profile options for multiple currencies:

- OS: Date Mapping Type
- OS: Default Period Type for Currency Conversion
- OS: Maximum Roll Days for Converting Amount

4.14.8 Setting Up Reporting Currency

All opportunity and forecast currency conversions are based upon the reporting currency setups. Please note, all possible reporting currencies are listed in the Profiles > Preferences > User Currency because they are set up by Oracle CRM Foundation. In order to view these currencies when entering opportunities or forecasting opportunities, they must be set up here.

Forms Navigation

Oracle Sales Setup > Lookup Codes > Sales

This path will take you to the Oracle Sales Lookup form.

Forms Responsibility

Oracle Sales Administrator

Steps

1. Press the F11 key to enter query mode.
2. Enter **REPORTING_CURRENCY** in the type field.
3. Press Control and F11 at the same time.

   Currency codes display in the bottom region of the Form.
4. Enter additional currency codes that you want available when an opportunity is created.
5. Enter the effective dates
6. Make sure **Enabled** is selected.
7. Save your work.

4.14.9 Entering GL Daily Conversion Rates

Follow the procedure described below to search for GL daily conversion rates.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > General > Globalization > GL Daily Rate

Responsibility

Oracle Sales Online Super User

Steps

1. To search for a GL Daily Rate:
    a. Select a From Currency from the drop down list. This is a required field.
    b. Select a To Currency from the drop down list. This is a required field.
    c. Optionally, select a conversion date by clicking the Calendar icon.
    d. Optionally, select a conversion type from the drop down list.
    e. Click **Search**.
2. From the search results page you can either enter a new conversion rate directly into the provided table OR click the Enter by Date Range button.
    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 Converstion Type from the drop down list. This is a required field.
    e. Enter the Converstion 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.
3. If you selected to create conversion rates directly into the table, click **Update**. If you have selected to create through the Enter by Date Range button click **Create**.

4.14.10 Entering Currency Conversion Dates for Periods (Pseudo Period Rates)

Follow the procedure below to be able to forecast sales in multiple currencies.

Steps

1. Follow the steps for the procedure Section 4.14.6, "Setting Up Type Mapping" to enter the types of conversion rates you will use for each period type such as fiscal year, month, or quarter for the calendar you selected.
2. Set the system profile *OS: Date Mapping Type for Periods* by choosing whether you want to use the daily rate from the start or end date of a period for currency conversion.
3. Follow the steps for the procedure outlined in Section 4.14.10.1, "Defining Conversion Rates for Periods" below to search to see if the conversion rates have been entered for your periods. Enter any missing conversion rates.

4.14.10.1 Defining Conversion Rates for Periods

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > General > Globalization > Period Rate

Responsibility

Oracle Sales Online Super User

Steps

The Pseudo Period Rates page opens.

1. To search for Pseudo Period Rates:
   a. Select a Calendar from the drop down list.
   b. Enter the full or partial name of the Period Name, using % as a wildcard, click **Go**.
   c. Select the period name and click **Select**.

   d. Select Start or End Date from the Mapping Date radio buttons.
   e. 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**. Select the period name. 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 the Period Name list of values in a previous step.
   e. Enter the rate in the Rate field.
   f. The **Updatable** and **Deleteable** boxes display if the pseudo period rates can be changed. If you need to change the status of these boxes, click the Type Mapping link.
3. Click **Update** to save your work.

4.14.11 Run Concurrent Programs

Forms Navigation

Concurrent Requests > Run

Forms Responsibility

Oracle Sales Administrator

Run the following concurrent programs.

- Refresh AS_PERIOD_DAYS table
- Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)

For detailed instructions on running concurrent programs, please refer to the *Oracle Applications System Administrator's Guide.*

If you are using opportunity bins and forecast materialized views, run the following concurrent program to refresh materialized views:

- Refresh Sales Credit Denorm
- Refresh of Forecast Summary Tables

4.15 Setting Up Quoting

Applies to: Sales Online, TeleSales

Sales applications rely on Oracle Quoting, formerly named Oracle Order Capture, for quote and order management. Oracle Sales Online uses the HTML-based interface for Oracle Quoting. Oracle TeleSales uses the Forms-based interface. However, both implementations use the *Oracle Quoting Implementation Guide*.

Oracle Sales Overview

Sales representatives using quoting functionality can have a variety of permissions, such as the ability to submit a quote as an order or to create new customers. Permissions are determined by your system administrator or sales manager.

Your main work flows are:

Opportunity to Quote: You begin in Sales Online to work on an opportunity. On the opportunity details page, if the profile *OSO: Enable Quotes* is set to Yes, then a Create Quote button appears on the page. Clicking this button will lead you to create a quote based on that particular opportunity. In TeleSales, you view your opportunity in the Opportunity Center and click the Create Quote button.

Campaign to order: You begin in Sales Online to fulfill the campaign to opportunity work flow. To create a quote as part of a sales campaign or to conclude a campaign, click the Quote tab in Sales Online. You then create a quote within Sales Online, and submit the quote as an order if you have the permission to do so.

Quote to order: You create quotes for customers. You can also submit the quote as an order if you have the permission to do so.

View quotes for an opportunity or party: In Sales Online when you are working on opportunities, organizations, people, or relationship detail pages, there is a Quotes link on the side menu panel. Click the Quotes link to see all quotes that have been created for this opportunity or party. In TeleSales you view quotes on the Quote tab of the eBusiness Center.

Create a quote without an opportunity: In TeleSales you can create a quote from the Quote tab in the eBusiness Center.

Steps

The following step details are located in the *Oracle Quoting Implementation Guide*. It is necessary that you perform the following steps, as outlined in the *Oracle HTML Quoting Implementation Guide*, in order for the Sales Online quoting functionality to work properly.

- Create new user
- Assign a Sales Representative role
- Import a CRM resource
- Set profile options
- Set QTO profile options

Quote Profiles

In order to view the Create Quote button in Sales Online, you must set the following profiles:

- **OSO: Enable Quotes:** must be set to Yes to enable the Create Quote button on the opportunity detail page
- **IBE: Use Pricelist Associated with Specialty Store:** (optional) must be set to Yes if you want to view quotes in the storefront
- **MO: Operating Unit**
- **Enable OSO Integration:**

To use Quoting in TeleSales, see the Importing a CRM Resource section of the *Oracle HTML Quoting Implementation Guide* and follow the steps.

For TeleSales, set up the quoting flexfield *Header: Additional Information*. See the next section for information on setting up flexfields.

4.16 Setting Up Flexfields

Applies to: Sales Online, TeleSales

Refer to the *Oracle Applications Flexfield Guide* for detailed information about setting up descriptive flexfields.

Sales Online uses two types of descriptive flexfields. When flexfields are displayed for the single entity (e.g., an address on a page) they are context-sensitive. When they are displayed in HTML tables (e.g., opportunity contacts) only their global contexts are displayed.

The following table lists the flexfields used by both TeleSales and Sales Online and the details about each flexfield. Please note, it is very important to freeze and compile the flexfields using the Forms application after installation is complete. The procedures for freezing and compiling flexfields is located in the *Oracle Applications Flexfield Guide*.

Flexfield Name	Title	User Interface Location	Context Sensitive
ASF_USER_PREFERENCE	ASF User Preference	Organization / Person, Create / Detail	Yes
Remit Address HZ	Address	Address Create / Detail (location information such as country, address1, state, city, etc.) Used for Global Address Formatting.	Yes
HZ_PARTIES	Party Information	Organization / Person, Create / Detail	Yes
HZ_PARTY_RELATIONSHIPS	Party Relationship Information	Relationship Create / Detail	Yes
HZ_ORG_CONTACTS	Organization Contact Information	Relationship Create / Detail	Yes
HZ_PARTY_SITES	Party Site Information	Address Create / Detail (Attributes section)	Yes
AS_INTERESTS	Interests	Opportunity, Classifications	No
AS_ACCESSES	Accesses	Opportunity / Organization / Person Sales Team	No
AS_LEADS	Opportunities	Opportunity Create / Detail	Yes
AS_SALES_LEADS	Sales Leads		
AS_SALES_CREDITS	Sales Credits	Opportunity Sales Credits	No
AS_LEAD_COMPETITORS	Opportunity Competitors	Opportunity Competitors	No
AS_LEAD_CONTACTS	Opportunity Contacts	Opportunity Contacts	No
AS_LEAD_LINES	Opportunity Lines	Opportunity Purchase Items	No

Flexfield Name	Title	User Interface Location	Context Sensitive
AS_SALES_LEAD_LINES	Sales Leads Lines	Leads	No
AS_SALES_LEAD_CONTACTS	Sales Leads Contacts	Leads	No
AS_SALES_LEADS	Sales Leads	Leads	Yes

4.17 Setting Up the Home Page

Applies to: Sales Online, TeleSales

Most of the setup in this section applies only to Sales Online.

The Home subtab in Sales Online 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 a user has not set up home page preferences, a default set of components is displayed. The default components shown are the Opportunity Status bin, My Forecasts bin, Open Opportunities bin, and My Home Page Report.

Prerequisites

In order to display meaningful data, it is necessary to set up the Opportunities, Forecasting, Multiple Currencies, Lead Management, and Customer modules before you set up the home page.

Content for different components of the home page are generated in either parallel or sequential mode. Sequential mode is the default. Update the profile *OSO: Generate Homepage bins in sequence* to change this behavior.

The maximum time allowed for each of the home page components to retrieve and render data is controlled by the profile *OSO: Home Page Timeout*. The default setting is 5000 milliseconds. If processing for any component takes more than the time set for this profile, the process will be stopped and an error message will the rendered.

Overview

In Oracle Sales Online the Home tab includes the following subtabs:

- Home
- Tools

- Marketing
- News
- Encyclopedia
- Resources
- Reports

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.

The Tools subtab provides Internal Tools, such as territory lookup and events. This subtab also includes External Tools, which are links to related applications outside of Sales Online.

The Marketing subtab is a salesperson's portal to Marketing entities such as campaigns, events, collateral, products, and pricing. This subtab will only work if you have also implemented Oracle Marketing.

The News subtab can be set up to provide news information conveniently.

The Encyclopedia subtab is the Marketing Encyclopedia System. It is a repository of sales and marketing information such as product collateral and sales kits. You must set-up the Marketing Encyclopedia module for this subtab to work. TeleSales also uses this repository.

The Resources subtab allows you to search for resources or groups.

The Reports subtab list all reports available.

The following steps are required for setting up your home page:

- Section 4.17.1, "Running Concurrent Programs for Materialized Views" (Sales Online and TeleSales)
- Section 4.17.2, "Setting Up Home Page Bin Accessibility" (Sales Online)
- Section 4.17.3, "Setting Up Home Page Message" (Sales Online)
- Section 4.17.4, "Setting Up External Tools" (Sales Online)
- Section 4.17.4.1, "Setting Up Links to External Sites" (Sales Online)
- Section 4.17.4.2, "Setting Up Links to ERP Applications" (Sales Online)
- Section 4.17.5, "Setting Up News" (Sales Online)
- Section 4.17.6, "Setting Up Charts" (Sales Online)

- Section 4.29, "Setting Up Marketing Encyclopedia System" (Sales Online and TeleSales)

Bins and Charts

The available bins and charts in Sales Online are:

- **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 close 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 ares 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.*

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

Forms Responsibility

Oracle Sales Administrator

Forms Navigation

Administration > takes you to HTML

Responsibility

Oracle Sales Online Super User

HTML Navigation

Administration > Sales > Home Page Bins

4.17.1 Running Concurrent Programs for Materialized Views

Applies to: Sales Online, TeleSales

A materialized view is an aggregation table. Data is pre-populated into the table to improve performance. (Only one concurrent program applies to TeleSales, number 6.)

To populate and refresh data in Lead and Opportunity bins, and the drill down reports, you need to run concurrent programs.

Responsibility

Oracle Sales Administrator

Navigation

Concurrent Requests > Run

Steps

1. Log in to the Forms application.
2. Select the Oracle Sales Administrator responsibility.
3. Double-click **Concurrent Requests**.
4. Double-click **Run**.
5. Select the Single Request radio button.
6. Click **OK**.
7. Search for the concurrent request that you want to run. See the table below for the concurrent requests and their details.
8. Click **Submit**.
9. Select from the search results.
10. Click **OK**.
11. Click **OK** to run the concurrent request.

For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Table of Concurrent Programs

The following is a table of concurrent programs.

Program Number	Mandatory	Concurrent Program Name	Description	Notes
1	Yes	Initial Build of Opportunity and Leads Bins	This program is used for complete build of the base materialized views for Opportunity and New Leads bins, charts, and reports. This program loads the materialized views with sales credit and leads information. For the parameter "Next Extent Size" you can choose the value of the next extent to be allocated for all tables and indexes created. Possible values for the parameter are: Small (1M), Medium (5M), Large (10M)	This program must be run: *Initially before users can set up Opportunity and Leads bins, charts, and reports. *Every time the as_sales_credit_denorm, JTF groups denorm or as_period_days is rebuilt or completely refreshed. *When values such as sales stages or statuses have been changed. *When snapshot logs and indices on base materialized views need to be re-created. *When reporting hierarchy or group usages are changed.
2	No	Refresh of Lead Bins Data	This program refreshes the data in base materialized views for Leads. This program must be scheduled to run periodically.	Users will not see leads in the bins, reports, or charts that were created after the last refresh of the base materialized view. Prerequisite: Program number 1
3	No	Refresh of Opportunity Bins Data	This program refreshes the base materialized views for Opportunities. This program must be scheduled to run periodically.	Users will not see opportunities in the bins, reports, or charts that were created after the last refresh of the base materialized view. Prerequisite: Program number 1

Program Number	Mandatory	Concurrent Program Name	Description	Notes
4	Yes	Initial Load for Leads Reports	This program loads the summary tables from the base materialized views. This program must be run initially before users can set up Leads bins and Reports and then periodically to refresh the summary tables. The parameter "Number of Processes" is the number of desired parallel processes to load the summary tables should be specified here.	Users will not see leads in the bins and reports that were created after the last refresh of the summary tables. This program should be run every time the concurrent program number 1 is executed. Prerequisite: Program number 1, the first time for complete refresh. Program number 2, for incremental refresh. If this job fails, try the following: Run "Drop temp tables for Home Page MVs" to cleanup TEMP tables. Re-run Initial Load for Leads Reports.

Program Number	Mandatory	Concurrent Program Name	Description	Notes
5	Yes	Initial Load for Opportunities Reports	This program loads the summary tables from the base materialized views. This program must be run initially before users can set up opportunity bins and reports and then periodically to refresh the summary tables. The parameter "Number of Processes" is the number of desired parallel processes to load the summary tables should be specified here.	Users will not see opportunities in the bins and reports that were created after the last refresh of the summary tables. This program should be run every time the concurrent program number 1 is executed. Prerequisite Concurrent program number 1, the first time for complete refresh. Concurrent program number 3 for incremental refresh. If this job fails, try the following: Run "Drop temp tables for Home Page MVs" to cleanup TEMP tables. Re-run Initial Load for Opportunities Reports.
6	Yes	Calculate Party Totals	This program gathers the necessary metrics required to evaluate the Top Customers. For TeleSales, this program updates order information such as the last ordered date.	This is an Oracle Order Management concurrent program.

If there are any missing indexes for the materialized views, run *Index Creating for Missing Indexes for MVs.* This concurrent program automatically detects which indexes are missing and recreates them. Additionally, this concurrent program re-analyzes all tables.

Alternatively, run these concurrent programs in order:

1. *Initial Build of Opportunity and Leads Bin* (program number 1)
2. *Initial Load for Leads Reports* (program number 4)
3. *Initial Load for Opportunities Reports* (program number 5)

For refresh programs to work efficiently, the alternate option is recommended.

4.17.2 Setting Up Home Page Bin Accessibility

Applies to: Sales Online

You can manage which responsibility, such as agent, representative, or manager, has access to which bins through the Home Page Bins link from the Administration tab. Access to the bin allows the user to add the bin to their home page and edit the bin as desired.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Home Page > Home Page Bins

Responsibility

Oracle Sales Online Super User

Steps

1. The Home Page Bins Administration page opens.
2. Select the Application from the drop down list. Please note, Sales Online is listed as Oracle Field Sales.
3. Select the Responsibility for which you want to give bin access from the drop down list.
4. Click **Search**.

   You will see a list of all the bins that this responsibility has access to.
5. Restrict access to the bin by selecting the Disable box. Giving access to a bin means that you did not select the Disable box.
6. Click **Update**.

4.17.3 Setting Up Home Page Message

Applies to: Sales Online

You can create or edit the message that is displayed in the upper right section of the home page. This message is customizable with HTML tags.

This is an optional step.

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Home Page > Home Page Message

Responsibility

Oracle Sales Online Super User

Steps

1. Enter a new message in the text box.

   Use HTML to customize the message.

2. Click **Update**.

   This message can be updated as frequently as needed.

4.17.4 Setting Up External Tools

Applies to: Sales Online

The application, Oracle Sales Online, can provide users with access to 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 application comes with links to the following:

- Oracle Projects
- Dun and Bradstreet

- Oracle Expenses
- Oracle eTravel
- Oracle iMeeting
- Oracle Notifications

The following sections provide information about setting up links to external sites and ERP applications.

4.17.4.1 Setting Up Links to External Sites

Prerequisites

None

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Home Page > External Tools

Responsibility

Oracle Sales Online Super User

Steps

1. Enter the following required fields:
   - Category: Identifies the category for which this link falls.
   - Link text: This text will show on the page.
   - Link: (e.g., for a URL, http://www.oracle.com)
   - Link type: Select the type, function or URL
   - Description: Describe the link with text, such as, "Use this link to view all projects".
2. Select the Enabled box to enable the link.

3. Click **Update**.

To remove a link, select the Remove icon next to the link that you want to remove. Click **Update**.

4.17.4.2 Setting Up Links to ERP Applications

Prerequisites

None

Forms Navigation

Administration > takes you to HTML

Forms Responsibility

Oracle Sales Administrator

HTML Navigation

Administration > Sales > Home Page > External Tools

Responsibility

Oracle Sales Online Super User

Steps

1. Enter the following required fields:
   - Category: Identifies the category for which this link falls.
   - Link text: This text will show on the page.
   - Link: (should be the function name of the ERP application page)
   - Link type: Select Function
   - Description of this function
2. Select the Enabled box.
3. Click the **Update** button.

This tool is now available from the Home Page under Tools.

Users will only be able to access the ERP application if they have the appropriate responsibility for that application. In order to specify the responsibility for a user, in the FORMS application, choose the System Administrator responsibility, then Security > Use > Define. Query on the user name and add in the responsibility and application name if they are not listed there.

Bounce the Apache server after making any changes to the tools administration.

4.17.5 Setting Up News

Applies to: Sales Online

See the *Oracle Marketing Encyclopedia User Guide*, "Integrating with OneSource" under the "Implementing Oracle Marketing Encyclopedia" section for detailed information.

4.17.6 Setting Up Charts

Applies to: Sales Online

HTML Navigation

Profiles > Home Page

Responsibility

Oracle Sales Online Super User

Prerequisites

In order for charts to display data, it is necessary to populate the underlying materialized views. Please make sure the instructions in Section 4.17.1, "Running Concurrent Programs for Materialized Views" are followed.

Steps

1. To enable run-time image generation for Charts functionality on Unix, you must specify the X Server that will be used to generate dynamic images. This server does not have to be a dedicated server for Applications; however, it does need to be accessible by the Apache server that will call it. This can be done through "xhost +", or through a more secure "xauth" Unix command. You can also reference a Windows NT Machine that is running a Unix emulator like Exceed. See the main pages for "xhost" and "xauth" for more information.

Note: This step is not required if you are installing the JTF framework on a Windows-based operating system. To implement the Display Server identifier update <ORAHTTP_TOP>/Jserv/etc/jserv.properties with the following changes:

---

2. Add the following DISPLAY parameter immediately below the wrapper.bin variable.

   a. wrapper.env=DISPLAY=<xserver-hostname>:<xserver-displayport>

3. Replace <xserver-hostname> and <xserver-displayport> with the machine name and port number where the X Server is running.

   For example, wrapper.env=DISPLAY=myxserver.mycorp.com:0

   Note: This step would be done only if you start the Apache Jserv in the Automatic mode. If you are starting the Jserv in Manual mode then you need to set the DISPLAY environment variable, either in the script that starts the jserv or on the shell that will (re)start the Apache.

   ---

   setenv DISPLAY <xserver-hostname>:<xserver-displayport>

4. Mount the oa_servlets in the servlet zone. In order for charts to work, Jserv must be able to run servlets. Configuring servlets involves creating a servlet mount point, adding a java.properties file, modifying a jserv.properties file.

   Please refer to the *Installing Oracle Applications, Release 11i* for detailed instructions.

Customizing Chart User Interface

Some chart parameters can be customized for a different use interface. The following profiles control how the labels and ticks are rendered. Default values are in parentheses.

These profiles control the Axis labels. For example: Jan-01 and Feb-01 shown on the axis.

JTFB_GRAPH_AXIS_LABEL_FONT_NAME (Arial)

JTFB_GRAPH_AXIS_LABEL_FONT_BOLD (N)

JTFB_GRAPH_AXIS_LABEL_FONT_SIZE (13)

These profiles control the styles of the legend text. For example: Won, Lost, and 50-75%.

JTFB_GRAPH_LEGEND_LABEL_FONT_NAME (Arial)

JTFB_GRAPH_LEGEND_LABEL_FONT_BOLD (N)

JTFB_GRAPH_LEGEND_LABEL_FONT_SIZE (13)

These profiles control the title styles

JTFB_GRAPH_TITLE_FONT_NAME (Arial)

JTFB_GRAPH_TITLE_FONT_BOLD (N)

JTFB_GRAPH_TITLE_FONT_SIZE (16)

These profiles control the tick label styles. The amounts shown next to the sectors in a pie chart are examples of tick labels.

JTFB_GRAPH_TICK_LABEL_FONT_NAME (Arial)

JTFB_GRAPH_TICK_LABEL_FONT_BOLD (N)

JTFB_GRAPH_TICK_LABEL_FONT_SIZE (11)

This profile controls the width of the plot lines rendered in line graphs.

JTFB_GRAPH_2D_LINE_WIDTH (1)

This profile limits the number of legends that can be shown in a chart.

OSO: Max Chart Legends (20)

This profile controls the label length of the legend.

OSO: Max Legend Label Length (22)

Chart Colors

Customize chart colors using the lookup ASF_CHART_COLOR_PALETTE. The order of the colors specified in this lookup determine the order in which the colors for different legends appear. The color specified is the HEX equivalent of RGB.

The following table lists the chart colors.

Lookup Type	Values	Affects	Level
ASF_CHART_COLOR_PALETTE	#99cccc #336699 #cccc33 #ccff99 #339966 #9999ff #996633 #99cc33 #0066cc #ffcc00 #009999 #999999 #cccc66 #666699 #ccccff	The series colors used for charts.	Site

4.18 Enabling Default Responsibilities

Applies to: Sales Online, TeleSales

Performing these steps enables users to set a default responsibility within their available responsibilities.

Responsibility

System Administrator

Navigation

Settings > Site Preferences > Interapplication Bar > Navigation Group Setup

Prerequisites

None

Steps

1. Log into the admin console using the SYSADMIN account.
2. Navigate to Navigation Group Setup.
3. Enter a group name.
4. Enter a description for the group.
5. Leave Status as Active.
6. Enter a value for the Display Order field.
7. Click **Update**.
8. Click the Details icon to the right of the Group Name or click Navigation Group Details from the Side Navigation Menu.
9. Select the Application for the group.
10. Click **Update**.
11. This will create an application navigation list across the top of the screen. Click the application name to switch between two or more applications.

4.18.1 Test Enabling of Default Responsibilities

Responsibility

Your user account

Navigation

Profile > Personalization > Navigation Preferences

Steps

1. Select a default responsibility associated with the application chosen for the group.
2. Click **Update**.
3. Log out.
4. Log back in. The application associated with the new default responsibility should display.

4.19 Setting Up Menu Administration

Applies to: Sales Online

The Menu Administration page is used to organize the side panel navigation menus for Sales Online. By re-sequencing menus, creating parent/child menus, and re-naming menus, you can organize the side panel navigation to your preferences.

Forms Responsibility

Oracle Sales Administrator

Forms Navigation

Administration > takes you to HTML

Responsibility

Oracle Sales Online Super User

HTML Navigation

Administration > Sales > Menu Administration

4.19.1 Resequence Side Panel Navigation Menus

You can use this feature to re-organize your side panel navigation menus.

Responsibility

Oracle Sales Online Super User

Navigation

Administration > Sales > Menu Administration

Steps

1. Select a Menu Name from the drop down list.
2. Click **Go**.
3. Enter the desired sequence number in the Sequence field.
4. Click **Update**.

4.19.2 Change the Menu Name

You can use this feature to change the names of menus.

Responsibility

Oracle Sales Online Super User

Navigation

Administration > Sales > Menu Administration

Steps

1. Select a Menu Name from the drop down list.
2. Click **Go**.
3. Enter the new menu name in the Attribute Text field.

   For seeded menus, it is recommended that you do not change the Function Name.
4. Click **Update**.

4.19.3 Create a Parent Menu

You can use this feature to create parent menus. For example, if you want Classifications to become a parent menu of Relationships, indicate the parent and child menu relationship here.

Responsibility

Oracle Sales Online Super User

Navigation

Administration > Sales > Menu Administration

Steps

1. Select a Menu Name for which you want to create a parent menu for from the drop down list.
2. Click **Go**.
3. Select the parent menu from the Parent Attribute drop down list. This parent attribute will become the parent menu of the menu you previously selected.

4. Click **Update**.

4.19.4 Create Your Own Menu Using Existing Pages

These steps apply only for adding pages already provided by Oracle to a side panel menu.

Responsibility

Oracle Sales Online Super User

Navigation

Administration > Sales > Menu Administration

Steps

For adding pages already provided by Oracle to a side panel menu:

1. In the first blank line on the page, enter a Sequence number for the menu to appear in the side navigation panel. For example, if you have Menu A in sequence number 15 and Menu B in sequence number 20, you can fit Menu C in between A and B by entering 16 in the Sequence field.
2. Enter an attribute in the Attribute Field.
3. Enter the menu name that you want to display in the Attribute Text field.

   For seeded menus, it is recommended that you do not change the Function Name.
4. If you want this menu to be a child menu, select the parent menu from the Parent Attribute drop down list.
5. Click **Update**.

4.19.5 Create Your Own Menu Using Page You Have Created

Responsibility

Oracle Sales Online Super User

Navigation

Administration > Sales > Menu Administration

Steps

For adding pages that you have created to a side panel menu:

1. Write a JSP. This must be written in the same way as the other Oracle Sales Online pages in order to create parent menus.
2. Create a function corresponding to this page.
3. Using Application Developer / System Administrator responsibility, add the function to the menu tree using the forms application.
4. Using System Administrator responsibility, create an AK.ATTRIBUTE (Region Attribute) with long label as the name of the function.
5. Using System Administrator responsibility, add the attribute to the region ASF.FUNC.SEC.REG.

   After all steps are complete, you can use the menu administration page to add the new page to a side panel menu.

Reference

Oracle Applications System Administrator's Guide for instruction on adding a menu to a tree and creating an attribute.

4.20 Setting Up CRM Foundation Modules

Applies to: Sales Online, TeleSales

CRM Foundation provides modules of common functionality used throughout the application suite. Some modules enable user functionality such as notes, calendar, interaction tracking, and task management. Other foundation modules enable the delivery of email documents (Fulfillment) or the distribution of leads and opportunities throughout the organization (Territory Management).

The following modules are optional:

- Section 4.20.1, "Setting Up Notes"
- Section 4.20.2, "Setting Up Interaction Tracking"
- Section 4.20.3, "Setting Up Tasks"
- Section 4.20.4, "Setting Up Calendar"
- Section 4.20.5, "Setting Up CRM Foundation Fulfillment"
- Section 4.21, "Setting Up Territories"

Note: If you encounter problems using the foundation components of the application, you can set the following profile to provide debug messages that could be helpful in resolving problems. The profile is *FND: Message Level Threshold*.

See the *Oracle CRM Applications Foundation Implementation Guide* for the steps required to implement the required modules.

4.20.1 Setting Up Notes

Responsibility

CRM Administrator

Navigation

CRM Foundation > Notes Setup

Steps

Users can create notes about the different objects in sales applications. You may choose to use the predefined set of note types and create additional note types of your own.

Refer to the "Implementing Notes" section of the *Oracle CRM Applications Foundation Implementation Guide* for information about setting up notes.

The following profile options relate to setting up Notes:

- OS: Auto-relate Opportunity note to Primary Contact
- OS: Auto-relate Opportunity note to Customer
- OS: Auto-relate Lead note to Primary Contact
- OS: Auto-relate Lead note to Customer
- OS: Auto-relate Relationship note to Object
- OS: Auto-relate Relationship note to Subject
- OTS: Default Note Type
- OTS: Number of Months to view Notes and Interactions for
- OTS: Relate Account to Tasks and Notes
- Notes: Default Note Status

4.20.2 Setting Up Interaction Tracking

Responsibility

CRM Administrator

Navigation

CRM Foundation > Interaction History Administration

Steps

The Interaction History module provides the CRM suite with a common framework for capturing and accessing all interaction data associated with customer contacts. It acts as a central repository and provides a consistent API for tracking all customer interactions, whether or not automatic or involving an agent. It is crucial in providing the 360 degree view.

Currently for the Sales applications, only Oracle TeleSales can create interactions. Oracle Sales Online can only view interactions.

Refer to the "Implementing Interaction History" section of the *Oracle CRM Applications Foundation Implementation Guide*.

4.20.3 Setting Up Tasks

Responsibility

CRM Administrator

Navigation

CRM Foundation > Task Manager

Steps

Refer to the "Implementing Task Manager" section of the *Oracle CRM Applications Foundation Implementation Guide*.

The following profile options relate to setting up Tasks:

- Task Manager: Owner type for task
- Task Manager: Default assignee status
- Task Manager: Default Task Status

- Task Manager: Default Task Type
- Task Manager: Default Priority
- OTS: Relate Account to Tasks and Notes
- OTS: Default Task Date Type
- OTS: Task Details - Query Task By
- Client Timezone
- Task Manager: Enable automated Task Workflow Functionality: This profile is not used by TeleSales. But in order to initiate the workflow this profile needs to be set to Yes.

4.20.4 Setting Up Calendar

Responsibility

CRM Administrator

Navigation

CRM Foundation > Calendar Setup

Steps

Refer to the "Implementing Calendar" section of the *Oracle CRM Applications Foundation Implementation Guide.*

4.20.5 Setting Up CRM Foundation Fulfillment

You must implement fulfillment if you plan to deliver collateral via e-mail to customers and prospects.

Refer to the "Fulfillment" section of the *Oracle CRM Applications Foundation Implementation Guide* for information about setting up e-mail servers as well as the electronic collateral itself.

4.21 Setting Up Territories

Oracle Territory Management consists of a repository of rules and an engine. To implement territories for sales you need to set up territories per the *Oracle Territory Management Implementation Guide* and in addition set up the Territory Assignment Program used by sales that sits on top of Territory Management (see Section 4.22, "Setting Up and Using Territory Assignment Program (TAP)"). Then you can optionally implement named account territories using Oracle Territory Management.

Applies to: Sales Online, TeleSales

Oracle Territory Management provides user interfaces and functionality that organizations can use to manage sales territories.

If you choose not to set up Oracle Territory Management, then users must manually assign leads, customers, and opportunities.

Use Territory Management to automatically assign sales teams based on their availability and expertise. Also use it to make sales information more secure by restricting personnel access to customer data.

Most sales territories are one-dimensional. They can assign tasks to employees based on geography or company size. Territory Management makes it possible for you to create multidimensional territories using any number of such criteria. These criteria include:

- Postal code
- Area code
- Country
- Company size

For example, you can assign all large customers within a specific geographical area only to those sales representatives who have an expert knowledge of a product and have been with the company for more than one year.

You can create multiple such territories for individuals or for teams of sales representatives. Think of Oracle Territory Management as a high-level programming tool that determines the assignment of tasks and resources within your company.

Reference

Oracle Territory Management Implementation Guide

Oracle Territory Management User Guide

Guidelines for Sales Applications

Note: The only category of resources that the Territory Assignment Program supports is Employees.

You must create your territories under the Oracle Sales and TeleSales folder in the Navigator.

You must choose one or more of the three available transaction types on the Overview tab:

- Account
- Lead
- Opportunity

Available Transaction Qualifiers

Oracle sales applications support the following transaction qualifiers for creating territories: See Section 4.22.10, "Transaction Qualifiers" on page 4-177

4.22 Setting Up and Using Territory Assignment Program (TAP)

Applies to: Sales Online, TeleSales

This topic covers the Territory Assignment Program (TAP). The information included in this topic is intended to help you understand TAP and show you the necessary steps to implement TAP. See the following links:

- Section 4.22.1, "Intended Audience" on page 4-166
- Section 4.22.2, "TAP Definition" on page 4-166
- Section 4.22.3, "TAP Guidelines" on page 4-167
- Section 4.22.6, "Setting Up Resource Teams and Groups for TAP" on page 4-169
- Section 4.22.7, "Running Concurrent Programs" on page 4-171
- Section 4.22.8, "Setting Profile Options" on page 4-174
- Section 4.22.9, "Tables Used" on page 4-175

4.22.1 Intended Audience

This documentation is intended for use by a person with knowledge of the Oracle Sales Online or TeleSales application.

Intended audience includes, but is not limited to:

- System Administrators
- Oracle Sales Consultants
- Implementation Experts

4.22.2 TAP Definition

The Territory Assignment Program is used to assign opportunities, leads, or customers to a sales resource automatically (by running a concurrent program) by territory. Territories are defined by selecting qualifiers (parameters), through the Oracle Forms application, during the implementation process. This is a mandatory step in implementing and using Oracle Sales Online or TeleSales.

There are three types of TAP. Two are available from the batch program:

- Total Mode: Processes all records and all territories. Run with a new implementation or after major changes have been made to territory definitions.
- New Mode: Only processes changes made since the last time you ran the concurrent program Assign Territory Accesses. Run frequency is based on your business needs.

The following mode is not available from the batch program:

- Online (Real Time) Mode: Process automatically assigns resources to transactions as they are created if one of the associated profiles *OS: Enable Real Time Customer Assignment*, *OS: Enable Real Time Opportunity Assignment*, or *OS: Enable Real Time Lead Assignment* is set to Yes.

4.22.3 TAP Guidelines

The following are guidelines for using and implementing the Territory Assignment Program.

Territory Name

Territories consist of a user defined name. For example, "Southwest" or "Northwest".

Effective End Date

Territories have an "effective end date". This end date indicates the end date for the territory, which ends the assignment of opportunities, leads, and customers to that territory.

Transaction Qualifiers

Territories have **qualifiers**. These qualifiers are parameters which the program uses to assign opportunities, leads, and customers to a sales resource. For example, "State = California" or "Opportunity Amount > 50,000". There are approximately 30 qualifiers. You can use multiple qualifiers to define a territory.

Assigned Resources

Territories have resources assigned to them. This means that if a qualifier is met, then the program will assign the resource to the opportunity, lead, or customer.

Note: The only category of resources that the TAP program supports is Employees.

Transaction Type

Territories have transaction types. The transaction types are Account (Customer), Opportunity, and Lead. Sales team resources are assigned to one or more of these transaction types. Transaction types dictate which qualifiers (rules) that you can use.

Access Type

Sales resources have access types. The access types are Account, Opportunity, and Lead. Access types are not related to qualifiers. You can use one or more access types.

Note: TAP should be run by a resource who is a valid sales force.

4.22.4 Prerequisites for Online (Real Time) TAP

The Territory Assignment Program is based on the implementation of Oracle Territory Management. After implementing Oracle Territory Management, you can proceed with setting up TAP.

- Section 4.21, "Setting Up Territories"
- Section 4.22.7.1, "JTF: Generate Territory Packages"
- Additional Prerequisite for Online TAP

Additional Prerequisite for Online TAP

To make Real Time Customer Assignment work you will need the following setup:

- *HZ: Execute API Callouts* must be set to Y
- *OS: Enable Real Time Customer Assignment* must be set to Y

Navigate to System Administration > Workflow > Find Event Subscription > hzcrmhk_pkg and change the phase as described in the table below:

Event	Function	Phase
oracle.apps.ar.hz.ContactPoint.create	hz_crmhk_pkg.create_contact_point_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.ContactPoint.update	hz_crmhk_pkg.update_contact_point_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Location.update	hz_crmhk_pkg.update_location_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Organization.create	hz_crmhk_pkg.create_organization_post	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Organization.update	hz_crmhk_pkg.update_organization_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Person.create	hz_crmhk_pkg.create_person_post	1
	hz_event_elt.hz_param_delete	2

Event	Function	Phase
oracle.apps.ar.hz.Person.update	hz_crmhk_pkg.update_person_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Relationship.create	hz_crmhk_pkg.create_party_relationship_pre	1
	hz_crmhk_pkg.create_party_relationship_post	2
	hz_event_elt.hz_param_delete	3
oracle.apps.ar.hz.Relationship.update	hz_crmhk_pkg.update_party_relationship_pre	1
	hz_crmhk_pkg.update_party_relationship_post	2
	hz_event_elt.hz_param_delete	3

- The phase for "hz_event_elt.hz_param_delete" should always be the highest.

4.22.5 Prerequisites for Batch Mode TAP

The Territory Assignment Program is based on the implementation of Oracle CRM Application Foundation. After implementing Oracle CRM Application Foundation, you can proceed with setting up TAP.

4.22.6 Setting Up Resource Teams and Groups for TAP

Prerequisite

Resource Groups and Sales Groups must be set up in CRM Foundation in order to use this feature with TAP.

Sales Group Support in TAP

When a sales group is assigned to a territory, members of the group will be added to the sales team if:

- Usage of the group is Sales
- Member is an Employee and has a Sales role

The following members of a group will not be added to the sales team:

- Members who belong to a parent or child of the group
- Inactive members
- Members who are not employees

- Member having inactive Sales roles
- If member already exists on the sales team for the same group (in case of customer sales team, same group having default role)

The following changes will take effect only when TAP is run in Total mode. New mode TAP will not be able to handle these changes unless JTF Resources writes the changes in jtf_terr_rsc_all.

- If a member is removed or added in the sales group
- If the group is disabled
- If the group usage is changed

When a group is removed or added to a territory, the changes take effect after TAP is run in Total or New mode.

Online TAP uptakes this functionality as well.

The sales team tab doesn't support this functionality.

Resource Group Support in TAP

A resource group consists of one or more individual resources as well as sales groups.

When a resource team is assigned to a territory, members of the sales team are added to the sales team if the Usage of the resource team is Sales and:

- Member is an Individual and is an Employee and has a Sales role or
- Member is a group and:
  - Usage of the group is Sales and
  - Member of the group is an Employee and has a Sales role

The following members of the resource team will not be added to the sales team:

- Inactive members
- Members who are not employees
- Members not having Sales roles
- Member having inactive Sales roles
- Members already exist on the sales team for the same group (in the case of a customer sales team, the same group having a default role)

- Groups not having sales usage members who belong to a parent or child of the group (if member is a group).

The following changes will take effect only when TAP is run in Total mode. New mode TAP will not be able to handle these changes unless JTF Resources write the changes in jtf_terr_rsc_all:

- If resource team is disabled
- If resource team usage is changed
- If a member is removed or added in the resource team or the sales group which is member of the resource team
- If the group is disabled
- If the group usage is changed

When the resource team is removed or added to a territory, the changes take effect after TAP is run in Total or New mode.

Online TAP will uptake this functionality as well.

The Sales Team tab supports this functionality with the following differences:

- The Sales Team tab supports partners within a resource team, TAP will not (as TAP does not process partners).
- The Sales Team tab does not support groups within a resource team. TAP will support groups within a resource team.

4.22.7 Running Concurrent Programs

Oracle Sales administrators can assign territories in batch mode by running the Assign Territory Access concurrent program. Depending on need, this concurrent program automatically launches a second concurrent program which processes the individual territory assignments. This second concurrent program is called Generate Territory Access.

Run the following concurrent programs:

- JTF: Generate Territory Packages
- Assign Territory Accesses (ASTATA)

4.22.7.1 JTF: Generate Territory Packages

After defining territories, you must run the Generate Territory Package concurrent program. If you do not run this program, the changes you made do not take effect. Run this program every time a territory is added or changed.

Generate Territory Packages does the following:

- Builds the API that returns the winning territories, which are defined in territory setup.
- Creates a search index for faster performance.
- Kicks off named account catchall workflow processing
- Refreshes territory administration portals for Sales

Responsibility

Oracle Sales Administrator

Navigation

Functions > Concurrent Requests > Run

Steps

1. Select **Single Request**.
2. Enter **`Generate%`**.
3. Click **Find**.
4. Select **Generate Territory Packages**. The parameters panel appears.
5. Select the following:
   - Usage: Oracle Sales and TeleSales
   - Transaction Type: Leave the field blank to include all three transaction types: account, lead, and opportunity.
   - Debug Flag: No
   - SQL Trace: No
6. Click **Submit**.

4.22.7.2 Assign Territory Accesses (ASTATA)

When run in total mode, ASTATA populates JTF input tables (JTF_TAE_1001_ACCOUNT/OPPOR/LEAD_TRANS) with active customers, opportunities, and leads. A user hook is available before and after this concurrent program.

Responsibility

Oracle Sales Administrator

Navigation

Functions > Concurrent Requests > Run

Steps

1. Select **Single Request**.
2. Enter **`Assign%`**.
3. Click **Find**.
4. Select **Assign Territory Accesses**. The parameters panel appears.
5. Select the following:
   - Run Mode: Total (total mode)
   - Debug: Yes
   - SQL Trace: Yes
   - Lead Status: Open (this depends on what leads you want to process)
   - User Hook Parameter 1
   - User Hook Parameter 2
   - User Hook Parameter 3

     If you implemented user hooks that pass information that require parameters, then select the user hooks here. If you have not implemented user hooks then no information will pass.
6. Click **Submit**.

Note: The user who runs this concurrent program should be a resource who has a valid resource role as a Sales Representative or Manager.

This process spawns the following *Generate Access Records* program.

Generate Access Records (ASTGAR) automatically runs after ASTATA

ASTGAR calls the JTF API which populates the winning territory table (JTF_TAE_1001_ACCOUNT/OPPOR/LEAD_WINNERS) based upon territory definitions. The program then inserts, updates, or deletes AS_ACCESSES_ALL and AS_TERRITORY_ACCESSES tables to make assignments.

4.22.8 Setting Profile Options

The following table displays the profile options associated with TAP.

Profile Name	Description	Setting Level	Default Value
HZ: Execute API Callouts	If the value is set to Yes, then changes made to customer records will be considered while TAP processing in New Mode. The value must be set to Yes for New Mode TAP to work.	User/Responsibility/Application/Site	No
OS: Enable Real Time Customer Assignment	If the value is set to Yes, then resources are assigned as soon as a transaction is created or updated.	Site	No
OS: Enable Real Time Opportunity Assignment	If the value is set to Yes, then resources are assigned as soon as a transaction is created or updated.	Site	No
OS: Enable Real Time Leads Assignment	If the value is set to Yes, then resources are assigned as soon as a transaction is created or updated.	Site	Yes
OS: Disable Batch Mode Lead Assignment	If the value of this profile option is Yes then TAP concurrent program (Assign Territory Accesses Program) will not assign resources to leads. If the value is No, then the program will assign resources to leads.	Site	Yes
OS: Territory Minimum Number of Records for Parallel Processing	Obsolete	Obsolete	Obsolete

Profile Name	Description	Setting Level	Default Value
OS: Territory Number of Child Processes	Obsolete	Obsolete	Obsolete
OS: Territory Records to Open for Processing Changed Accounts	Obsolete	Obsolete	Obsolete
OS: Territory Records to Commit	Obsolete	Obsolete	Obsolete

4.22.9 Tables Used

The following is a list of the read and write tables used in this process.

Read or Write	Table
Read and Write	JTF_TAE_1001_ACCOUNT_TRANS
Read and Write	JTF_TAE_1001_OPPOR_TRANS
Read and Write	JTF_TAE_1001_LEAD_TRANS
Read and Write	JTF_TAE_1001_ACCOUNT_WINNERS
Read and Write	JTF_TAE_1001_OPPOR_WINNERS
Read and Write	JTF_TAE_1001_LEAD_WINNERS
Read	JTF_TERR_QTYPE_ALL
Read	JTF_TERR_USGS_ALL
Read	JTF_TERR_ALL
Read	JTF_QUAL_TYPE_USGS_ALL
Read	JTF_QUAL_USGS_ALL
Read	JTF_TERR_QUAL_ALL
Read	JTF_TERR_QTYPE_USGS_ALL
Read	JTF_TERR_VALUES_ALL
Read	JTF_TERR_RSC_ACCESS_ALL
Read	JTF_TERR_RSC_ALL

Read or Write	Table
Read	JTF_TERR_CHANGED_ALL
Read	JTF_RS_RESOURCE_EXTNS
Read	JTF_RS_ROLE_RELATIONS
Read	JTF_RS_ROLES_B
Read	JTF_RS_ROLES_TL
Read	AS_INTERESTS_ALL
Read	AS_LEADS_ALL
Read	AS_LEADS_LINES
Read	AS_LAST_RUN_DATES
Read	AR_LOOKUPS
Read	HZ_ORGANIZATION_PROFILES
Read	HZ_PARTY_SITES
Read	HZ_PARTIES
Read	HZ_PARTY_SITES
Read	HZ_LOCATIONS
Read	HZ_CONTACT_POINTS
Read	HZ_RELATIONSHIPS
Read	FND_PROFILE_OPTION_VALUES
Read	FND_PROFILE_OPTIONS
Read	FND_USER
Write	AS_ACCESSES_ALL
Write	AS_TERRITORY_ACCESSES
Write	AS_CHANGED_ACCOUNTS_ALL

4.22.10 Transaction Qualifiers

Territories have qualifiers. These qualifiers are parameters that TAP uses to assign opportunities, leads, and customers to a sales resource. For example, "State = California" or "Opportunity Amount > 50,000". You can use multiple qualifiers to define a territory. There are approximately 30 qualifiers, see the table below for qualifier name, type, and description.

Name	Type	Sales Attribute	Available	Supported
Account Classification	Account	Interest of "party site"	=	=
Account Code	Account	Customer Name + Address (party site ID)	=, <>	=
Account Hierarchy	Account	"Subsidiary Of" a particular organization	=, <>	=
Area Code	Account	Area Code	=, BETWEEN, LIKE, <>, NOT BETWEEN, NOT LIKE	=, BETWEEN
City	Account	City	=,<>	=
County	Account	County	=,<>	
Country	Account	Country		
Customer Category	Account	Customer Category		
Customer Name	Account	Customer Name		
Customer Name Range	Account	Customer Name Range	=, BETWEEN, LIKE, <>, NOT BETWEEN, NOT LIKE	=, BETWEEN, LIKE
Number of Employees	Account	Total Employees	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN
Postal Code	Account	Postal Code	=, BETWEEN, LIKE, <>, NOT LIKE	=, BETWEEN

Name	Type	Sales Attribute	Available	Supported
Province	Account	Province	=, <>	=
SIC Code	Account	SIC Code	=,<>	=
Sales Partner Of	Account	Partner Of	=, <>	=
State	Account	State	=,<>	=
Budget Amount	Lead	Budget	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN
Lead Expected Purchase	Lead	Product Category	=	=
Lead Inventory Item	Lead	Inventory Item	=, <>	=
Lead Promotion Identifier	Lead	Source Name	=, <>	=
Purchase Amount	Lead	Amount	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN
Opportunity Channel	Opportunity	Sales Channel	=, <>	=
Opportunity Classification	Opportunity	Classification	=	=
Opportunity Expected Purchase	Opportunity	Product Category	=	=
Opportunity Inventory Item	Opportunity	Inventory Item	=, <>	=
Opportunity Promotion Identifier	Opportunity		=, <>	=
Opportunity Status	Opportunity	Status	=, <>	=
Total Amount	Opportunity	Total	=, <>, BETWEEN, >, >=, <, <=, NOT BETWEEN	=, BETWEEN

- **Available Operators**: Available from Territory Management while setting up territories.
- **Supported Operators**: TAP only supports (assigns) these operators.

4.22.11 Frequently Asked Questions

The following section covers frequently asked questions about Territory Assignment Program or related topics.

4.22.11.1 Question: What is Territory Management?

Answer:

Territory Management is a rules repository plus an engine that is used to automatically assign sales, service, trade management, service contracts, and collection teams based on their availability and expertise. It can also be used it to make sales, service and collections information more secure by restricting personnel access to customer data.

Please refer to the *Oracle Territory Management Implementation Guide* for information about setting up Territory Management.

4.22.11.2 Question: How often should I run the “Generate Territory Package” concurrent program?

Answer:

Run this program as often as you need to activate your territory changes.

“Generate Territory Packages” builds the API that returns the winning territories and resources, and creates a search index for faster performance.

4.22.12 About Qualifiers

Qualifiers are the rules that determine where the resources are assigned. Set up is done by system administration when setting up territories.

The following section contains qualifiers that are commonly problematic for users.

They include:

- Account Classification
- Account Hierarchy
- Area Code
- Sales Partner Of
- SIC Code

- Customer Category
- Opportunity Classification

4.22.12.1 Account Classification

You can define a territory based upon site classification.

How to Create Data for Account Classification

1. Create Classification.
   a. Go to the Administration tab.
   b. Click **Interest.**
   c. Create Company Classification.
2. Classify a site (attach classification to a customer record)
   a. Login to the TeleSales application.
   b. From the eBusiness Center, query the organization.
   c. Click **Details.**
   d. Go to the Site Classification tab.
   e. Enter an interest type.
   f. Go to the Location field and select the address.
   g. Save your work.
3. Create a territory with an Account Classification qualifier
   a. Go to the Territory Administration form.
   b. Define a territory for the Account Classification qualifier.
   c. From the LOV select the Interest type and codes combination for the classification.
   d. Complete the territory definition.

How TAP Processes the Account Classification Qualifier

If a territory is defined with the Account Classification qualifier, then TAP finds customer locations who have defined classifications that match the territory definition and assigns resources to them.

Note: You can't create site classifications in Oracle Sales Online. Location is not a mandatory column in the Oracle TeleSales Site Classification tab. The Account classification qualifier will not work unless the Location field is populated.

If a territory is defined as a combination of the Account Classification qualifier and an address-related qualifier such as State, Country, or Postal Code, then make sure that the address entered in the Location field in the TeleSales Site Classification tab satisfies the address-related qualifier.

The Account classification qualifier has no relation to the Company Classification tab is Sales Online, which is based on the TCA classification.

4.22.12.2 Account Hierarchy

You can define territories based upon Parent Subsidiary relationships between organizations.

How to Create Data for Account Hierarchy

1. Create Account Hierarchy
   - Go to the Customer tab and drill down to the subsidiary organization in the relationship. Select the parent Organization in the relationship and create the Subsidiary Of relationship between the two organizations.
2. Create a territory with the Account Hierarchy qualifier
   - Go to the Territory Administration form, define a territory for the "Account Hierarchy" qualifier. From the LOV, choose the subsidiary organization of the relationship as the qualifier value.

Example

If ABC Company is subsidiary of XYZ Company and XYZ Company is Subsidiary of LMN Inc., then:

1. Drill down to customer detail page for ABC Company.
2. Create a relationship of "Subsidiary Of" with XYZ Company.
3. Similarly, drill down to customer detail page for XYZ Company .
4. Create a relationship of "Subsidiary Of" with LMN Inc.

5. Go to the Define Territory form and create a territory.
6. Set up the Account Hierarchy qualifier as follows: Account Qualifier = ABC Company.

How TAP Processes Account Hierarchy Qualifiers

If there is a parent subsidiary relationship between two organizations, then set up the subsidiary organization as the territory qualifier value. TAP finds the parent (up in the hierarchy) of the organization that is set as the territory qualifier and assigns resources to it.

> **Note:** Only parties that have a "SUBSIDIARY OF" relationship with other parties appear in LOV in the Define Territory form.
>
> If the *Create Party Flag* is set to N for the Subsidiary Of relationship, then the relationship type is not available in the Customer tab in the application while creating relationships.

4.22.12.3 Area Code

You can define a territory based upon area code.

How to Create Data for Area Code

1. In the Define Territory form, choose the Area Code qualifier. There is no LOV associated with this qualifier.
2. Enter the area code of the primary phone number at any active address or at the header level.

How TAP Processes Area Code Qualifier

If a territory is defined with the Area Code qualifier, then TAP finds matching records with the customer's primary phone number the same as the qualifier value.

Note: If a territory is defined as combination of some other address-related qualifier such as State, Country, or Postal Code and the Area Code qualifier, then make sure that the phone area code at the address is the same as the value defined for the Area Code qualifier. If you want to use this qualifier for opportunity or lead assignment, then make sure that the address attached to opportunities and leads satisfy the qualifier value.

4.22.12.4 Sales Partner Of

You can define a territory based upon the partner assigned to a customer, opportunity, or lead.

How to Create Data for the "Sales Partner Of" Qualifier

1. Create a partner. You can create sales partners through the Partner tab.
2. Assign the Partner to a transaction (customer, opportunities, or leads).
3. Add this partner to the external sales team for the transaction.
4. In the Define Territory form, choose the "Sales Partner Of" qualifier. From the list of values, choose the partner which is assigned to the transaction in Step 3.

How TAP Processes the "Sales Partner Of" Qualifier

If a "Sales Partner Of" qualifier is defined, then TAP finds transactions having external sales teams that match the "Sales Partner Of" qualifier. TAP then assigns resources to these transactions based upon the territory definition.

Example

ABC Company is partner of LMN, Inc. A customer AAA Insurance is created with address in California (CA) state. Opportunity "Hardware and Consulting" is created for customer AAA Insurance at above address. The user adds partner ABC Company to the external sales team of the opportunity and customer.

Territory T1 is defined with following Qualifier:

Partner_of: ABC Company

State: CA

The following resources are assigned to Territory T1:

- R1

- R2

When TAP runs, it adds R1 and R2 to the sales team of customer AAA Insurance and opportunity "Hardware and Consulting".

Note: If a territory is defined as a combination of some other address-related qualifier such as State, Country, or Postal Code and the "Sales Partner Of" qualifier, then the customer, opportunity, or lead address (not partner address) should satisfy all conditions.

Unless the Partner relationship created from the Customer tab of the application corresponds to a resource of category "Partner" in JTF resources, it will not appear in the LOV while defining the qualifier.

4.22.12.5 SIC Code

You can define a territory based upon the SIC Code of a Customer.

How to Create Data for the SIC Code Qualifier

1. Create SIC Codes in AR lookups for SIC Code Type "1987 SIC" .
2. Assign the SIC Code Type "1987 SIC" and appropriate SIC codes to the customers.
3. Define a territory with the SIC Code qualifier, selecting the SIC code from the LOV.

How TAP Processes the SIC Code Qualifier

The LOV for Territory Qualifier displays only SIC codes for 1987 SIC Type. If the SIC Code qualifier is defined, then TAP finds customer records that satisfy this condition and assigns resources to it.

4.22.12.6 Customer Category

You can define a territory based upon the Category of customer.

How to Create Data for the Customer Category Qualifier

1. Create Customer categories in AR lookups.
2. Assign Customer Category to customers.

3. Define a territory with the Customer Category qualifier, selecting the customer category from the LOV.

How TAP Processes the Customer Category Qualifier

If the Customer Category qualifier is defined, then TAP finds customer records that satisfy this condition and assigns resources to it.

4.22.12.7 Opportunity Classification

You can define a territory based upon the Classification of an opportunity.

How to Create data for Opportunity Classification

1. Navigate to the Administration tab.
2. Create an Opportunity Classification.
3. Create an opportunity.
4. Enter the Opportunity Classification.
5. Create a territory with the transaction type "Opportunity".
6. Select Opportunity Classification qualifier and enter the classification.

How TAP processes Opportunity Classification Qualifier

If a territory is defined with the Opportunity Classification qualifier then TAP finds matching opportunities and assigns resources to them.

> **Note:** Opportunity classification is different than opportunity product category. For example, TAP will not consider any purchase items entered for the opportunity while processing this qualifier.

4.22.13 Troubleshooting

The following section is intended to provide information to help you if you encounter a problem with Territory Assignment Program set ups.

Run diagnostic reports using the following steps:

1. Log into HTML APPS as SYSADMIN / SYSADMIN.
2. Select the Diagnostics tab. This opens a new window.
3. Select the Basic tab in the new window.

4. Change the Application to CRM Foundation.
5. Select Territory Management in the left menu.
6. Click **Run Without Prerequisite**.
7. Click **Report** to see the report details.

The following queries provide additional information:

1. Log files with the "Debug" option turned "On".
2. Trace files in case of performance issues or if the program terminates with errors.

   Run tkprof with following options and send us the output files SORT = exeela fchela EXPLAIN = apps/psswd SYS = no

The following table lists output of the related query.

Query Name	Query
Records in HZ_PARTIES	select party_type, count(*) from apps.hz_parties where STATUS = 'A' group by party_type select count(*) from hz_party_sites where status = 'A' select count(*) from hz_locations
Volume of Opportunities and Leads	select count(lead_id) from apps.as_leads_all select count(sales_lead_id) from apps.as_sales_leads
Volume of Access Records	Select count(*) from AS_ACCESSES_ALL Select count(*) from AS_TERRITORY_ACCESSES
Volume of Changed Accounts prior to run (required only for New Mode)	Select request_id, sequence, count(*) from AS_CHANGED_ACCOUNTS_ALL group by request_id, sequence
Database Parameters	select name, value from V$PARAMETER where UPPER(name) in ('HASH_AREA_SIZE', 'SORT_AREA_SIZE')
Duplicate Active Organization Profiles	select party_id from hz_organization_profiles where sysdate between nvl(effective_start_date, sysdate-1) and nvl(effective_end_date,sysdate+1) group by party_id having count(*) > 1

Query Name	Query
Number of ACTIVE Sales Territories	select count(*) from apps.jtf_terr_all jta, apps.jtf_terr_usgs_all jtua where jtua.terr_id = jta.terr_id and jtua.source_id = -1001 and jta.start_date_active <= SYSDATE AND NVL(jta.end_date_active, SYSDATE) >= SYSDATE
Number of VALID Sales Territories for Assignment	select jtdr.qual_type_id, count(*) from apps.jtf_terr_denorm_rules_all jtdr where jtdr.source_id = -1001 and jtdr.terr_id = jtdr.related_terr_id group by jtdr.qual_type_id
Number of VALID Sales Territories with Reps for Assignment	select jtdr.qual_type_id, count(*) from apps.jtf_terr_denorm_rules_all jtdr where jtdr.source_id = -1001 and jtdr.terr_id = jtdr.related_terr_id and jtdr.resource_exists_flag = 'Y' group by jtdr.qual_type_id
Total # of Territory Resource Assignments	select count(*) from apps.jtf_terr_rsc_all jtr where jtr.start_date_active <= SYSDATE AND NVL(jtr.end_date_active, SYSDATE) >= SYSDATE AND EXISTS (SELECT jtdr.terr_id FROM jtf_terr_denorm_rules_all jtdr WHERE jtdr.source_id = -1001)
Total # of DISTINCT Territory Resources (Total # of Active Reps)	SELECT COUNT (*) FROM (select DISTINCT jtr.resource_id, jtr.resource_type from apps.jtf_terr_rsc_all jtr where jtr.start_date_active <= SYSDATE AND NVL(jtr.end_date_active, SYSDATE) >= SYSDATE AND EXISTS (SELECT jtdr.terr_id FROM jtf_terr_denorm_rules_all jtdr WHERE jtdr.source_id = -1001))

Query Name	Query
Total Number of Values in System	select count(*) from jtf_terr_values_all jtv, jtf_terr_qual_all jtq where jtv.terr_qual_id = jtq.terr_qual_id and jtq.terr_id IN (select jt.terr_id from apps.jtf_terr_all jt, apps.jtf_terr_usgs_all jtu where jtu.source_id = -1001 and jtu.terr_id = jt.terr_id and jt.start_date_active <= SYSDATE AND NVL(jt.end_date_active, SYSDATE) >= SYSDATE)
Total Number of Values per each Qualifier in System	select jtq.qual_usg_id, count(*) from jtf_terr_values_all jtv, jtf_terr_qual_all jtq where jtv.terr_qual_id = jtq.terr_qual_id and jtq.terr_id IN (select jt.terr_id from apps.jtf_terr_all jt, apps.jtf_terr_usgs_all jtu where jtu.source_id = -1001 and jtu.terr_id = jt.terr_id and jt.start_date_active <= SYSDATE AND NVL(jt.end_date_active, SYSDATE) >= SYSDATE) group by jtq.qual_usg_id order by 1 desc
Total Number of values per Qualifier in MV	select mv.qual_usg_id, count(*) from jtf_terr_qual_rules_mv mv group by mv.qual_usg_id order by 1 desc
Distinct Qualifier Operators	SELECT jtv.comparison_operator, COUNT(*) FROM apps.jtf_terr_values_all jtv GROUP BY jtv.comparison_operator

4.23 Attaching Custom JSP Pages

Use the following procedure to attach the custom JSP pages that you have created to an existing Oracle Sales Online page.

Applies to: Sales Online

Responsibility

Application Developer and Application Developer Common Modules

Navigation

See below

Steps

1. Search for the function name of the JSP page that you want to add.

   Responsibility: Application Developer

   Navigation: Application > Function > Web HTML tab

2. Create an AK attribute.

   Responsibility: Application Developer Common Modules

   Navigation: Define Attributes

   a. Confirm that the attribute ID is the function name of the JSP page with the suffix "_C_J_I". The attribute ID may be the attribute name.

   b. Select the application name, Oracle Field Sales.

   c. Select the data type VARCHAR2.

   d. Set the value length to any number. This field is not used.

   e. In the label column, type in the name of the custom JSP page that you want to create. The JSP page must be in the OA_HTML directory.

3. Repeat Step 2 for all custom JSP pages that you want to attach.

4. Create an AK region.

   Responsibility: Application Developer Common Modules

   Navigation: Define Regions

   a. Confirm that the region ID is ASF_CUSTOM_JSP_INCLUDES.

   b. Select the application name, Oracle Field Sales.
   c. Select the object name, ICX_PROMPTS.
   d. Set the region style to any style. This field is not used.
   e. Add the attributes that you defined as region items for this region. Click the Region Item button on the form.

5. Bounce the Apache server.

When you log into the application, you will see the new page included at the bottom of the page.

4.24 Adding a Custom Report to Report Listings

Applies to: Sales Online

Some reports are shipped as part of this product. They are listed under each tab under the Reports subtab in the Report Listing Pages. If you create a custom report and want it to display on the Reports subtab, follow these steps to add the report:

Steps

1. Create a JSP for users to enter their search criteria. This page is called the ParameterPage. The page needs to have a filter section if saved query is needed for this particular report.
2. Create another JSP to show the report data. This page is called the ResultPage.
3. Create one FND function for each of those two pages. Add the ParameterPage's function under ASF_XXXXX_REPORTS menu. XXXXX may be "CUSTOMER", or "LEAD", and so on.
4. You can use function exclusions on responsibilities to control which responsibility cannot see which reports. For more details about how to exclude FND functions from some responsibilities, please refer to the CRM Foundation documentation.
5. If no saved query is used for this report, you can stop here. Otherwise, please continue to the next step.
6. Create a default saved query for that report. When you visit the ParameterPage for the first time, you will see seeded parameters based on this default saved query. This can be done by modifying a Java program and run it against customer's database.

7. Each report needs to have a unique query type. For example, you may choose to give your report a query type QTQT.
8. Register in AK the attribute of the name of this report type and put it in the region "ASF_REPORT_NAMES"
9. In JTA property manager, you will need to do the following things:

- To create a new value (QTQT) for your report query type in the value set of the property "querytype.<xxx>reports". <xxx> can be customer, lead, forecast or opp.
- To create a new value for your report query type in the value set of the property "querytype.reports" (same value as the previous one, QTQT.)
- To create a new JTA property called "querytype.QTQT.desc". And add the following values for this property.

```
sectionname$<sn>
parameterpage$<pp>
resultpage$<rp>
tab$<t>
name$<name>
```

<sn> is the section name of the filter section in ParameterPage.

<pp> is the FND function name of ParameterPage, defined in Step 3.

<rp> is the FND function name of ResultPage, defined in Step 3.

<t> is the tab function name to be highlighted for this query type, like ASF_OPPORTUNITES.

<name> is the AK attribute name for the name of this report type.

10. Change oracle.apps.asf.util.ReportNameHash to reflect the changes in AK as well. This step will be obsolete after OSO Profile page has taken the new report registration method with JTA's Property Manager.

4.25 Excluding Tabs and Functions

Applies to: Sales Online

Function security is a means with which you can control user access to application functionality. 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 functionality is identified as a function, it can be secured (i.e., included or excluded from a responsibility). This security is thoroughly described in the *Oracle Applications System Administrator's Guide, Release 11i*.

The goal of this topic is to give you a brief overview so that you understand the concept behind this action. Refer to the *Oracle Applications System Administrators's Guide*, Release 11*i* for more detailed information.

Terms

Function: A function is a part of an application functionality that is registered under a unique name for the purpose of assigning it to, or excluding it from, a responsibility.

Menu: A menu is a hierarchical arrangement of functions and menus of functions. Each responsibility has a menu assigned to it.

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

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

4.25.1 Excluding Tabs Overview

Use this procedure to exclude tabs from the application.

Responsibility

System Administrator

Navigation

Application > Menu

Steps

1. Create a new menu.
2. Identify menus corresponding to the tabs or subtabs that you want to exclude.
3. Save your work.

4.25.2 Preventing Users From Accessing Specific Functions

A responsibility may require function and / or menu exclusion rules associated with it to restrict the application functionality enabled for that responsibility. This would prevent those users within the specific responsibility from accessing certain functionality.

Responsibility

System Administrator

Navigation

Security > Responsibility > Define

Steps

1. Navigate to the responsibility that you want to update.
2. In the Menu Exclusions section, identify the functions that you want to exclude by entering the name of the function.
3. Save your work.

4.25.2.1 Finding Function Names

Steps

These instruction are for JSP pages developed with the Oracle Sales Online framework only. Applications using this framework include ASF, ASM, AMF, IBC, AST, CN, and BIL.

A system administrator can find a function name of an Oracle Sales Online framework page following these steps:

1. Login to the application and navigate to the desired page;
2. Read the URL. It should say “http://...../<a file name, with .jsp>?.....”
3. Go to $HTML_TOP, open that file, and search for a line saying ....setFunctionName(“<a function name>”).

   That is the function name for the page.

   To exclude this function, bounce the application server in order to view the change. Also, if this page is accessible from hyperlinks or buttons, those hyperlinks or buttons will not function after the excluding the function. It is recommended that you test all pages from which this excluded page may be reached before excluding the function.

Reference

Refer to the *Oracle Applications System Administrator’s Guide* for complete information about function security.

4.26 Setting Minimum Number of Search Characters for LOV

Applies to: Sales Online

The following restrictions are applied by default on user entered search strings. For example, when searching for an opportunity by name you must enter at least four characters. These characters can include wildcards (%).

The minimum number of characters that must be entered to search in an LOV (list of values) is controlled by the following profile:

- OSO: Minimum search char length: Default value is shipped as "4"

  Whether or not the leading character can be a wild card is controlled by this profile.

- OSO: Search Lead Wildcard: Default value is shipped as "N"

To customize the restriction on blind search, an AK Region "ASF_FRK_LOV _SEARCH" can be used. This region contains the names of the LOVs that should be excluded from the blind search restriction.

Responsibility

Application Developer Common Modules

Navigation

Define Regions > perform Query

Steps

1. Query for "ASF_FRK_LOV_SEARCH". Use % as a wildcard character.
2. Click the **Region Items** button.
3. Add the LOV's Attribute ID as a region item for this region. Attribute Type (Attribute), Application (Oracle Field Sales), Attribute Name (See below for Attribute IDs/LOVs mapping), Length (This is the length of the search string. If you want to allow totally blind searches, set this to 0).
4. Bounce the Apache server (midtier) and clear the cache.

The following table lists attribute IDs and LOV mappings.

Attribute Code	LOV
ASF_FS_ACCOUNT_LOV	Accounts LOV
ASF_FS_ADMIN_ACCTER_LOV	Admin Territories LOV
ASF_FS_ADMIN_CAMPAIGN_LOV	Campaign LOV Page
ASF_FS_ADMIN_CLASS_CODE_LOV	Select a Class Code
ASF_FS_ADMIN_CUSTOMER_LOV	Customer LOV Page
ASF_FS_ADM_PRICODE_LOV	Select a Primary Code
ASF_FS_ADM_QUOTA_LOV	Select a Plan Element
ASF_FS_ADM_SECCODE_LOV	Select a Second Code
ASF_FS_ADS_DEMONAME_LOV	Demo Name LOV
ASF_FS_ADS_INSTNAME_LOV	Instance Name LOV
ASF_FS_ASSGN_LOV	Assignee List of Values
ASF_FS_CAMPAIGN_LOV	Campaign LOV
ASF_FS_CLASS_CODES_LOV	Classification Codes LOV
ASF_FS_CMPTR_LOV	Competitor LOV
ASF_FS_CSTMR_LOV	Select a Customer
ASF_FS_EMPLY_LOV	Select a Resource

Attribute Code	LOV
ASF_FS_LEAD_LOV	Lead LOV
ASF_FS_OFFER_LOV	Offer LOV
ASF_FS_OPPTY_LOV	Select an Opportunity
ASF_FS_ORGZN_LOV	Select an Organization
ASF_FS_PERIOD_NAME_LOV	Admin Period Name LOV
ASF_FS_PERSN_LOV	Person LOV
ASF_FS_PRDCT_LOV	Competitor Product LOV
ASF_FS_PRJCT_LOV	Project LOV
ASF_FS_PRTNR_LOV	Partner LOV
ASF_FS_PURLN_LOV	Inventory Item LOV

4.27 Setting Up Partners

Applies to: Sales Online, TeleSales

The Partner subtab provides for the creation and management of information relating to Partner organizations.

Overview

Partners may be of the following types:

- **General Partners** are any parties in the CRM modules that have a "Partner Of" relationship with another organization or person. General Partners include Sales and Exchange Partners.
- **Sales Partners** have a specific partner agreement that allows the Vendor to pass a sales deal to that Partner through Oracle Partners Online.
- **Exchange Partners** may participate in the opportunity exchange system between multiple Vendors and a Partner.

Reference

Refer to the *Oracle Partners Online Implementation Guide* for information about setting up Partners.

4.28 Setting Up Marketing Source Codes

Applies to: Sales Online, TeleSales

Sales applications use marketing source codes to track which marketing activity is responsible for a sale or a sales activity.

Source codes are created by different marketing activities created in Oracle Marketing. This includes campaigns, campaign schedules, events, event schedules, and offers. The source codes are either created automatically whenever marketers create one of these activities or entered by the marketer manually.

Campaigns and campaign schedules are the most important of these marketing activities in Oracle Marketing. Campaigns are constructed using a wide variety of marketing objects. The basic components of campaigns are its theme, the funding (budgets), the execution (schedules), the target audience (lists and marketing mediums), the cost (costs), and response measuring devices (metrics).

Because all campaigns are not created alike, custom setups are available to easily configure campaigns for different activities and marketing channels.

Campaigns often create a hierarchical structure. Campaigns can be divided by geography or by product or by marketing channel. Campaigns are developed using a parent child relationship. A parent campaign can have many child campaigns. A child campaigns can in turn be a parent campaign as well.

The execution of a campaign can be further broken down by schedule. A schedule determines when, where, and how a campaign activity is executed. A particular campaign can have multiple schedules for many different marketing channels and for execution of a campaign over a period of time.

Refer to the *Oracle Marketing Implementation Guide* and *Oracle Marketing User Guide* for information on how to set up marketing source codes.

You must also set up the following system profiles:

- *OS: Source Code Mandatory for Leads*
- *OS: Source Code Required for Opportunity*

4.29 Setting Up Marketing Encyclopedia System

Applies to: Sales Online, TeleSales

The Marketing Encyclopedia System is a repository of sales and marketing information such as product collateral and sales kits. Follow the instructions in the *Oracle Marketing Encyclopedia Implementation Guide* to implement it.

4.30 Setting Up Incentive Compensation

Applies to: Sales Online, TeleSales

Oracle Incentive Compensation is an application within the Oracle E-Business Suite. The application can be deployed as a stand alone module or in combination with other Oracle applications to meet your solution requirements.

With Oracle Incentive Compensation, new incentive programs are configured with ease, approved online, and deployed worldwide. As sales transactions are received, the appropriate credits are accurately distributed and calculated according to the structure of the organization and the specific agreements that are in place. The sales organization receives up to the minute feedback on performance and earnings through self-service reports.

The architecture allows the application to be deployed for any size organization without the inherent limitations of spreadsheets, custom applications, or client server applications. Oracle Incentive Compensation is unmatched in its ability to support the global enterprise. Multiple currencies and languages are supported in a single database instance.

Refer to the *Oracle Incentive Compensation Implementation Guide* for information about setting up Incentive Compensation.

4.31 Adding Competitors to Marketing

Applies to: Sales Online, TeleSales

Before you can select competitors from the competitor field lists of values, competitors must be set up in Oracle Marketing.

Reference

Refer to the *Oracle Marketing Implementation Guide* or *Oracle Marketing User Guide*.

4.32 Setting Up WebMail Integration

Oracle WebMail is an optional alternative to using other email composers within the application. If you want to use Oracle WebMail, use the following steps to implement the product.

Applies to: Sales Online, TeleSales

Responsibility

System Administrator

Navigation

Profiles > System > Find Profiles

Steps

The following two profiles need to be set in order for the Oracle WebMail Integration process to be complete.

OSO: Use Web Mail Client: If set to Yes, WebMail is enabled.

OSO: Web Mail Agent: This profile indicates the protocol, location, and port of the server that WebMail is being served from (e.g., http://collabsuite.oracle.com or http//webmail.xyz.com:1234).

Assumptions

This implementation step assumes that you have a WebMail server set up properly. Additionally, the use of this functionality assumes that a user has an account in the WebMail server. This is separate from the regular application account. For information about setting up the server and setting up a user account, please refer to the *Oracle Collaboration Suite Configuration Handbook* and the *Oracle Collaboration Suite Administrator's Guide*.

5

Implementation Tasks for Oracle TeleSales

This chapter covers how to implement Oracle TeleSales. The procedures are listed in the suggested implementation order following the tasks covered in Chapter 4, "Implementing Oracle Sales Applications". For a complete checklist of ordered steps, please see Chapter 3, "Implementation Overview". Perform the following tasks:

- Section 5.1, "Setting Up Quick Menu"
- Section 5.2, "Hiding and Setting Default Tabs"
- Section 5.3, "Setting Up Custom Tabs"
- Section 5.4, "Setting Up Forms Integration with HTML-based Applications"
- Section 5.5, "Setting Up Mapping Capability for Addresses in eBusiness Center"
- Section 5.6, "Setting Up Universal Work Queue"
- Section 5.7, "Setting Up Marketing Events"
- Section 5.8, "Setting Up Marketing Collateral"
- Section 5.9, "Setting Up Scripting"
- Section 5.10, "Setting Up Call Center and Advanced Outbound and Advanced Inbound"
- Section 5.11, "Setting Up Campaign Assignments"
- Section 5.12, "Enabling Oracle eMail Center"
- Section 5.13, "Enabling Interaction Tracking and Wrap-up"
- Section 5.14, "Enabling Web Directory Assistance"
- Section 5.15, "Setting Up Relationship Plan"

- Section 5.16, "Setting Up Address Validation"
- Section 5.17, "Setting Up the Dashboard"
- Section 5.18, "Setting Up the At A Glance Window"
- Section 5.19, "Setting Up Web Collaboration"
- Section 5.21, "Integrating with Oracle Order Management"
- Section 5.22, "Integrating with Oracle Contracts Modules"

5.1 Setting Up Quick Menu

Responsibility

System Administrator

Forms Navigation

Profiles > System

Set the system profile option OTS: Start menu in QuickMenu to the out-of-box menu defined by `TeleSales Quick Menu`.

System Admintrators can create their own menus and add functions to the menu. Only seeded Quick Menu functions will carry the context from eBusiness Center to the called form. The menu can be set for the profile at any of the 4 levels. For details about quick menu refer to the Service Implementation Guide.

5.2 Hiding and Setting Default Tabs

You can determine which tabs a user can view in the eBusiness Center, the Lead Center and the Opportunity Center windows.

You can hide and expose tabs through menu and function exclusions when you set up responsibilities. If you exclude a tab, then that tab is hidden from view. Tabs cannot be permanently removed from the eBusiness Center, nor can the order of the tabs be changed.

See the Managing Oracle Applications Security chapter of the *Oracle Applications System Administrator's Guide.*

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Security > Responsibility > Define

Steps

1. Use Query Enter and Query Run to locate the responsibility.
2. Choose TeleSales in the Application fields.
3. If you want to exclude a tab, then go to the Menu Exclusions tab, Type = Function, and select the tab from the Name LOV.

eBusiness Center

The tabs available for eBusiness Center are:

- eBC Overview Tab
- eBC Dashboard Tab
- eBC Organization Tab
- eBC Person Tab
- eBC Address/Phone Tab
- eBC Relationships Tab
- eBC Account Tab
- eBC Lead Tab
- eBC Opportunity Tab
- eBC Quote Tab
- eBC Order Tab
- eBC Event Tab
- eBC Collateral Tab
- eBC Task Tab
- eBC Note Tab
- eBC Service Request Tab

- eBC Contract Tab
- eBC Install Base Tab
- eBC Custom Tab 1
- eBC Custom Tab 2
- eBC Collection Profile Tab

Profile: OTS: Default Tab in eBusiness Center: Sets the tab that appears when the window is opened.

Opportunity Center

The tabs available for the Opportunity Center are:

- Opportunity Center Notes Tab
- Opportunity Center Purchase Tab
- Opportunity Center Classification Tab
- Opportunity Center Sales Team Tab
- Opportunity Center Obstacle Tab
- Opportunity Center Task Tab
- Opportunity Center Lead Tab
- Opportunity Center Quote/Order Tab
- Opportunity Center Partner Tab
- Opportunity Center Contact Tab
- Opportunity Center Closing Tab

Profile: OTS: Default Tab in Opportunity Center: Sets the tab that appears when the window is opened.

If the profile option PV: Require Vendor User (CM) Approval for Manual Routing is set to Yes, then the routing flag is disabled. If it is set to No, then the routing flag is enabled.

Lead Center

Tabs available for Lead Center:

- Lead Center Purchase Interest Tab

- Lead Center Contact Tab
- Lead Center Sales Team Tab
- Lead Center Task Tab
- Lead Center Note Tab
- Lead Center Opportunity Tab

Profile: OTS: Default Tab in Sales Lead Center: Sets the tab that appears when the window is opened.

Universal Search

Profiles:

- OTS: Default Universal Search Type
- OTS: Default Universal Search Tab

Sets the defaults that appear when the search is opened.

Guidelines

The following table shows what tabs should be shown or hidden for sales users or non-sales users.

Table 5–1 Sales or Non-sales Users Show or Hide Tabs

Tab	Sales User	Non-Sales User
Overview	Show	Show
Dashboard	Show	Show
Organization	Show	Show
Person	Show	Show
Address	Show	Show
Relationship	Show	Show
Lead	Show	Hide
Opportunity	Show	Hide
Event	Show	Show
Collateral	Show	Show
Task	Show	Show

Table 5–1 Sales or Non-sales Users Show or Hide Tabs

Tab	Sales User	Non-Sales User
Note	Show	Show
Collection	Show	Show
Service Request	Show	Show
Contract	Show	Show
Install Base	Show	Show
Custom 1	Show	Show (based on customization)
Custom 2	Show	Show (based on customization

5.3 Setting Up Custom Tabs

Implementers can create two custom tabs in the eBusiness Center window by modifying the code for the eBusiness Center form and the associated library.

The customization must be made on a view or table which has a reference or intersection with HZ_PARTIES. The fields that can be displayed in the custom tabs will be based on this view or table.

The implementer must use public APIs provided by Development to perform transactions against this table. Code for Insert, Update, and Delete is built into these APIs.

All steps must be performed every time you change your custom forms or libraries.

Prerequisites

Knowledge of Forms development, Oracle Applications procedure, and understanding of Oracle coding standards.

Before you implement customizations, backup your files.

Steps

1. Customize the form:
   - Create a Data block with all the fields that are needed for displaying in the custom tab. This must be done in the form ASTCUTM1.fmb or ASTCUTM2.fmb.

- *On Insert* trigger must be coded for the data block to insert data into the tables with the corresponding public API call.
- *On Update* trigger must be coded for the data block to update data into the tables with the corresponding public API call.
- *On Delete* trigger must be coded for the data block to delete data from the tables with the corresponding public API call.
- The fields in the data block must be placed on the canvas "ASTRCALL_STACKED_CUSTOM1" (if using ASTCUTM1.fmb) or "ASTRCALL_STACKED_CUSTOM2" (if using ASTCUTM2.fmb).
- Any record groups and LOVs must be coded as needed for the fields displayed on the canvas. Out of the box, there are some fields displayed on the canvas for demo purposes. These fields can be removed from the canvas if not needed.
- In order to integrate this with the eBusiness Center, the data block, record groups, and LOVs must be dropped in the "CUSTOM1_OBJ_GRP" (if using ASTCUTM1.fmb) or "CUSTOM2_OBJ_GRP" (if using ASTCUTM2.fmb) object group. This object group is already subclassed into the eBusiness center.

2. Modify the library:

In the library ASTCUTM1.pld and ASTCUTM2.pld, after defining the custom block, please ensure that the following procedure is modified to make sure that the navigation occurs correctly to the first item in the tab.

```
AST_CBO_MAN.Define_CBO
(CBO_name => 'CUSTOM1',
 CBO_Blocks => 'CUSTOM1_BLOCK1',
 CBO_first_item => NULL,
 CBO_canvases => 'ASTRCALL_STACKED_CUSTOM1',
 CBO_popup_windows => NULL,
 CBO_input_params =>'person_party_id,org_party_id,
 relationship_party_id,party_type,party_site
@  _id,cust_acct_id,phone_id,email_id',
                        CBO_grid_items => NULL);
```

The CBO_first_item parameter is left as null intentionally. When new blocks are added to the custom tab, the CBO_FIRST_ITEM parameter should be added so that the canvas will paint correctly.

Please add or change code in the package CUSTOMER_PKG in ASTCUTM1.pld or CUSTOMER_PKG2 in ASTCUTM2.pld to suit your specific needs based on the comments provided in the library.

3. Set up the label for the custom tabs in the eBusiness Center:

   Use the Telesales Administrator responsibility and launch the OTS: Quick Codes form. Search for the lookup type called AST_EBC_TAB_Label or the User Name *OTS: eBusiness Center Tab Labels*. Change the meaning of the lookup code ASTRCALL_ASTCUTM1 (for ASTCUTM1.fmb) or ASTRCALL_ASTCUTM2 (for ASTCUTM2.fmb) to the desired name. This changes the tab name in the eBusiness center.

4. Integration into eBusiness center:

   The form can be compiled and run stand-alone for testing purposes.

   To integrate the custom tab into eBusiness center, perform the following steps:

   a. Copy the forms ASTCUTM1.fmb and/or ASTCUTM2.fmb to the `$AU_TOP/forms/US` directory in the patched environment.

   b. Compile the corresponding library and copy ASTCUTM1.pll and/or ASTCUTM2.pll to the `$AU_TOP/resource` directory in the patched environment.

   c. Please run the **adadmin** utility to compile AST forms and libraries so that the changes made to the Customer Form and Library are reflected in the eBusiness Center.

Important Note

Please back up these custom forms and libraries before applying any AST patches that include these files as these will be over-written in `$AU_TOP/forms/US` and `$AU_TOP/resource`. After the patch is applied successfully, please copy the customized files back to these directories and run **adadmin** to generate AST forms and libraries.

If there is a bug fix associated with the custom forms and libraries, the custom changes need to be made to the newer version of the files to reflect the bug fix in the customized tabs.

5.4 Setting Up Forms Integration with HTML-based Applications

To be able to launch JSP pages from Forms-based Oracle eBusiness Suite applications, including Oracle Sales Online, you must set up the following system profile options:

- **Apps Servlet Agent**

  Set this profile to the URL of the Apache server. For example: `http://ap084sun.us.oracle.com:7777/OA_HTML`

  Please refer to the *Oracle Applications Implementation* guide for more information.

- **OTS: JSP Details from OTS**

  Set this profile to yes to enable opening Oracle Marketing when user double-clicks a source code or source name in the eBusiness Center.

- **OSO: Application Utility Class**

  Set this profile to: `oracle.apps.asf.Util.OsoAppUtility`. This profile setting is required if you want to be able to view the Oracle Sales Online application.

- **FUNCTION_SECURITY_REGION**

  Set this profile at the Application level for the TeleSales application to: `ASF_FUNC_SEC_REG`. This profile setting is required if you want to be able to view the Oracle TeleSales home page.

5.5 Setting Up Mapping Capability for Addresses in eBusiness Center

You can make it possible for agents using the eBusiness Center to obtain maps of addresses in the Address tab. Agents can double click on the concatenated address field and be launched to the mapping service of your choice.

To set up the link between the application and the mapping service, you must set up the profile option: OTS: URL to Display a Map Of The Address.

For example, you can link to Yahoo Maps by entering the following URL:

```
http://maps.yahoo.com/py/maps.py?BFCat=&Pyt=Tmap&amp;newFL=Use+Address+Below&amp
;addr=ADDRESS1&csz=@CITY+@STATE+@POSTAL_CODE&Country=@COUNTRY&Get%AOMap=Get+Map
```

You pass parameters to the mapping service via the following URL variables. All of them start with the @ sign:

- @COUNTRY
- @COUNTY
- @POSTAL_CODE
- @PROVINCE
- @STATE
- @CITY
- @ADDRESS4
- @ADDRESS3
- @ADDRESS2
- @ADDRESS1

When this profile is set, agents viewing an address in the Address tab of the eBusiness Center see a green hyperlinked address field. This is the link they can use to launch the mapping service. If the profile is not set, then the address field is not hyperlinked.

5.6 Setting Up Universal Work Queue

Refer to the *Oracle Universal Work Queue Implementation Guide* for information about setting up the Universal Work Queue. This guide describes how the administrator can create new actions, hide actions, and set the drop down order for notes and actions.

If you plan to use the Marketing List node in the UWQ, then refer to the *Oracle Marketing Implementation Guide* for information about setting up campaign schedules and target lists. You also assign the campaign schedule created in Marketing to a sales agent or sales group. (See Section 5.11, "Setting Up Campaign Assignments".)

Set the following profile options:

- **IEU: Desktop: UI: Show Work Panel**

  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. The profile option can be set at the site, application, responsibility, and user levels. The default is No.

  Yes: The work panel appears for lead, opportunity, and marketing list nodes.

No: The work panel does not appear.

- **IEU: Desktop: UI: Work-Selector Display Style**

  This option determines how your work nodes are displayed. The profile option can be set at the site, application, responsibility, and user levels. The default is Hgrid.

  Hgrid: displays nodes in the left panel in an Hgrid view.

  Cascade: displays nodes in a cascading menu on top of the page.

- **IEU: Non-Media: Navigate**

  This option determines whether a new application window is opened every time the user selects a new work item. Set to Yes to tell UWQ to reuse the same application window when a user selects a new work item. Set to No if you want UWQ to open a new additional window when users select a new work item. Set to Yes to save computer resources. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: UWQ - auto launch lead and oppty center**

  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. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: Use Primary Address To Create Lead in UWQ**

  Set to Yes to use the primary address when creating a lead.

- **OTS: Use Primary Address to Create Opportunity in UWQ**

  Set to Yes to use the primary address when creating an opportunity. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: UWQ - Display Source Code and Name for Opportunity Nodes**

  Controls the display for opportunities in the UWQ. Options are None, Source Code Only, and Source Code and Name. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: Marketing List All Campaigns**

  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. The profile option can be set at the site, application, responsibility, and user levels. The default is No.

The following profile options control what nodes can be seen in Universal Work Queue and in what order. They can be set at all levels and each user can set these as personal profiles.

Profile	Description
IEU: Queue: Inbound Email	Determines if user can view counts of inbound e-mail in UWQ.
IEU: Queue: Inbound Telephony	Determines if a user can work on Inbound Telephony queues in UWQ.
IEU: Queue: Leads	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 - Manual Assignments	Determines if a user can work on Marketing Lists - Manual Assignments in UWQ.
IEU: Queue: My Team Opportunities	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.
IEU: Queue: My Tasks	Determines if a user can work on My Tasks in UWQ.
IEU: Queue: My Team Leads	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.
IEU: Queue: Opportunities	Determines if a user can work on Opportunities in UWQ.
IEU: Queue: Outbound Telephony	Determines if a user can work on Outbound Telephony queues in UWQ.
IEU: Queue: Quotes	Determines if a user can work on Quotes in UWQ.
IEU: Queue: Service Requests	Determines if an user can work on Service Requests in UWQ.
IEU: Queue: Tasks	Determines if a user can work on Tasks in UWQ.

5.6.1 Changing the Order of Items in the Work Queue.

If you want to change the order of work queue items you can set the following profiles to a sequence of numbers that reflect the order in which you want them to be presented.

For example, if you assign IEU: Queue Order: Myteam Leads to 1 and IEU: Queue Order: MyTeam Opportunities to 2, then all the leads with you on the sales team are listed first in the Universal Work Queue under the heading My Leads (Sales Team). All of your opportunities are listed second under the heading My Opportunities (Sales Team).

The following profiles determine the order the item appears on the work queue. Set these profiles to the sequence you want items in the work queue:

Profile	Work Queue Item
IEU: Queue Order: Inbound Email	Email
IEU: Queue Order: Inbound Telephony	Inbound call queue
IEU: Queue Order: Leads	My Leads (Owner): All leads you own
IEU: Queue Order: Marketing Lists - Manual Assignments	Marketing Lists
IEU: Queue Order: My Tasks	My Tasks
IEU: Queue Order: My Team Leads	My Leads (Sales Team)
IEU: Queue Order: My Team Opportunities	My Opportunities (Sales Team)
IEU: Queue Order: Opportunities	My Opportunities (Sales Credits)
IEU: Queue Order: Outbound Telephony	Outbound call queue
IEU: Queue Order: Quotes	Quotes
IEU: Queue Order: Service Requests	Service Request
IEU: Queue Order: Tasks	Tasks

5.7 Setting Up Marketing Events

In Oracle Marketing the administrator has the ability to set up confirmation letters for event registration that are fulfilled automatically upon registration. The confirmation letter is fulfilled in addition to any collateral or cover letter selected in Oracle TeleSales. See to the *Oracle Marketing Implementation Guide* for more information.

Use this procedure to set up events.

Prerequisites

- You must be set up as a user for Oracle Marketing.
- You must have the URL for Oracle Marketing.

Steps

1. Create events according to the *Oracle Marketing User Guide*. You can use event schedules or single events in the sales applications. Make sure of the following:
   - The event you create is active and you specify the event start date and end date.
   - You must enter a valid registration start date and end date. The registration start date cannot be earlier than today's date.
   - The Registration Required flag must be set in order to register in an event.
2. Log into Oracle applications again as a System Administrator.
3. Navigate to **Profile > System**.
4. Set the following profiles:
   - *OTS: Default Event Reply to Email Address*. Enter the email address you want event enrollees to use for replying to enrollment confirmation e-mails.
   - *OTS: Default Event Subject Line*. Enter the subject line for the enrollment confirmation email.

5.8 Setting Up Marketing Collateral

Use this procedure to set up collateral for Oracle TeleSales. This includes collateral sent with events. You can set up either physical collateral such as brochures, books, CDs, or electronic collateral which consist of e-mails and other files you create. Physical collateral is managed via Oracle Inventory. Physical collateral kits can be set up in Marketing and sent using TeleSales. Electronic collateral and print collateral is managed by the Fulfillment CRM Foundation module. Much of the initial collateral setup is done in Oracle Marketing according to the procedures you can find either in the *Oracle Marketing Concepts and Procedure*s or in the online help system. Please note that Oracle Marketing uses the term deliverable instead of collateral. This means that you must follow the procedures for creating deliverables.

Prerequisites

- You must complete Marketing Campaign implementation before setting up collateral.
- You must complete an Oracle Inventory implementation before setting up physical collateral.
- You must be set up as a user for Oracle Marketing.
- You must have the URL for Oracle Marketing.

Steps

1. Navigate to **Profiles > System**.
2. Set up the following system profile options:
   - AMS: Default Collateral Order Type. This profile option defaults the order type that was set up in Order Management or collateral fulfillment.
   - OTS: Default Shipping Method for Electronic Collateral. This profile sends the default fulfilment method for electronic collateral.
   - OTS: Default Shipping Method for Physical Collateral. This sets the default shipping method which can be changed by the agent sending collateral.
   - OTS: Default Cover Letter for Collateral Requests. This profile assigns a default cover letter for sending electronic collateral.
   - OTS: Default Collateral Printer Name. If you want to print collateral, then enter the network printer name.
   - AMS: Should Call To Inventory Modules To Be Made. Set to *Yes*.

- AMS: Should Call To Pricing Modules To Be Made. Set to *Yes*
- OTS: Default Collateral Reply To Email Address. This setting is required for sending electronic collateral. Enter the email address you want collateral recipients to use when replying with collateral confirmation emails.
- OTS: Default Collateral Subject Line. This setting is required for sending electronic collateral. Enter the subject line you want collateral recipients to use when replying with collateral confirmation emails.

3. If you are creating physical collateral then:

   a. Set the profile AMS: Item Validation Master Organization to your inventory organization.

   b. Log into Oracle Marketing HTML interface.

   c. Create the deliverable in the Create Deliverable window of Oracle Marketing selecting the Physical radio button.

   d. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters `DELV`.

   e. If you want to send physical collateral through order management, then set the profile option Default Collateral Order Type to default the order type that you set up to fulfill collateral orders through Oracle Order Management.

   f. Navigate to **Inventory > Items >Master Items**.

   g. Select the inventory organization for your collateral. You must select the inventory organization set up as the default organization in an Oracle Marketing. Please refer to *Oracle Marketing Implementation Guide* for more information about the default setting and the system profile where it is set.

   h. Use the Item List of Values (LOV) to enter the Item. As the LOV lists all of the items in your inventory, you may want to limit your search to `DELIV%`.

   i. If the collateral is going to be shipped from multiple warehouses, then from the Tools menu choose Organization Assignment and assign the appropriate warehouses. See *Oracle Inventory User's Guide* for more information.

   j. On the Main tab, use the Lists of Values (LOVs) to enter `Each` as the unit of measure. `Finished good` as the User Item Type and `Active` as the status. The Both radio button is selected by default.

k. On the Inventory tab, select the Inventory Item, Stockable, and Transactable boxes.

l. On the Costing tab, select the Costing Enabled, Inventory Asset Value, and Include in Rollup boxes.

m. On the Purchasing tab, select the Purchased and Purchasable boxes.

n. On the Order Management tab, select the Customer Ordered, Customer Orders Enabled, and Shippable radio buttons and enter the Default Shipping Organization.

o. On the Invoicing tab, select the Invoicable Item and Invoice Enabled boxes.

p. Click **Save** on the toolbar.

q. Navigate to **Inventory >Transactions > Miscellaneous Transactions.**

r. Use the Type LOV to enter `Miscellaneous receipt`.

s. Click **Transaction Lines**.

   The Miscellaneous Receipt window opens.

t. Use the LOV to enter the item.

u. Use the Sub Inventory LOV to enter **Stores**.

v. Enter the quantity of the item in inventory.

Note: You must enter a quantity for the item in Inventory. Entering a quantity in Oracle Marketing is not sufficient.

---

w. Use the Account Alias LOV to enter `Miscellaneous`.

x. Save your work.

4. If you are creating electronic collateral then:

   a. Follow the procedures described in the Fulfillment chapter of Oracle CRM Application Foundation Implementation Guide. This chapter explains both how to set up the fulfillment server and how to create your electronic collateral ready for mail merge.

   b. Create the deliverable in the Create Deliverable window of Oracle Marketing selecting the Electronic radio button.

c. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters `DELV`.

Note: If no part number appears, then the collateral item will not be available within Oracle TeleSales.

5.9 Setting Up Scripting

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures* to set up scripts for your agents.

Set profile options according to how you want scripting to work.

- If you want the script launched automatically when a call is received and if there is a script associated with the source code, then set the following profile options:

  Set *OTS: Script Launch on UWQ Delivery* is set to Yes

  Set *OTS: Script Launch on Interaction* is set to Yes

  Set *OTS: Scripting Installation* is set to Yes

- If you want the script launched automatically when an interaction is started in eBusiness Center and if there is a script associated with the source code, then set the following profile options:

  Set *OTS: Script Launch on Interaction* to Yes

  Set *OTS: Scripting Installation* to Yes

5.10 Setting Up Call Center and Advanced Outbound and Advanced Inbound

Setting up Advanced Inbound involves the following steps.

1. Install Interaction Center Server Manager
2. Define the Oracle Interaction Center server group
3. Define and configure the Oracle Interaction Center server processes
4. Configure Oracle Universal Work Queue for inbound telephony

5. Verification using the switch simulator
6. Define and configure CTI middleware
7. Map IVR data to fields in Oracle Applications
8. Set up routing for inbound calls
9. Set up classifications
10. Set up media action and classification
11. Install Oracle Call Center Connectors

For details on these implementation tasks, refer to the *Oracle Advanced Inbound Implementation Guide.*

For Setting up Oracle Advanced Outbound, please refer to the *Oracle Advanced Outbound Implementation Guide.*

5.11 Setting Up Campaign Assignments

Applies to: TeleSales with Oracle Advanced Outbound or Universal Work Queue Marketing List

In this step you assign marketing campaign schedules to individual sales agents or to sales groups. The sales groups are those groups or resources you created using Oracle Resource Manager, a component of Oracle CRM Application Foundation. Marketing campaign schedules are created using Oracle Marketing.

You can either assign campaign schedules to individual agents or sales groups or assign agents or sales groups to individual campaign schedules. Both procedures outlined below accomplish the same goal.

5.11.1 Assigning Campaign Schedules to Agents

Use this procedure to assign campaign schedules to agents or groups of agents.

HTML Navigation

Administration > Sales > Call Center > Campaign Assignments

Steps

The Campaign Assignment window appears.

1. If you want to assign campaign schedules to individual agents, then under the Assign to heading:
   a. Select the Resource radio button.
   b. Click **Go.**

      The Resource LOV appears.
   c. Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.
   d. Click **Go**.
   e. Select the individual's name from the list.
   f. The Campaign Assignment window displays the individual's name in the text box. Any campaign schedules already assigned to that individual appear.
2. If you want to assign campaign schedules to sales groups, then under the Assign to heading:
   a. Select the Resource Group radio button.
   b. Click **Go.**

      The Resource Group LOV appears.
   c. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.
   d. Click **Go**.

      A list of groups appears.
   e. Select the group's name from the list.
   f. The Campaign Assignment window displays the group's name in the text box. Any campaign schedules already assigned to that group appear listed below.
3. To assign campaign schedules to the individual or group:
   a. Click **Add Campaign**.

      New lines appear under the Current Campaign Assignments heading.
   b. Click **Go**.

      The Valid Campaign Schedule list appears.

c. Select the name of the campaign schedule you want to assign.

   The schedule you selected displays on the Campaign Assignment window.

d. Click **Update**.

e. Repeat this procedure for each campaign schedule you want to assign.

5.11.2 Assigning Agents to Campaign Schedules

Use this procedure to assign sales agents or sales groups to marketing campaign schedules.

HTML Navigation

Administration > Sales > Call Center > Agent Assignments

Steps

The Resource Assignment window appears.

1. If you know the campaign schedule name, then next to Schedule Name click **Go.**

   A list of campaign schedules appears.

2. You can also search by entering the name or a partial name of the campaign schedule in the Campaign Schedule Name field. You can use the % sign to substitute for missing characters and click **Search**.
3. Select the campaign schedule from the list and click **OK.**
4. The campaign schedule name populates the Campaign Schedule Name field.
5. If you want to assign an individual agent to the campaign schedule, then under the Assign to heading:

   a. Select the Resource radio button.

   b. Click **Add Resource.**

      New lines appear in the Current Resource Assignments section.

   c. Click **Go.**

      The Resources LOV appears.

   d. Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.

  e. Click **Go**.
  f. Select the individual’s name from the list.

6. If you want to assign sales groups to the campaign schedule, then under the Assign to heading:
   a. Select the Resource Group radio button.
   b. Enter the group’s name or partial name in the text box. You can use the % sign to substitute for missing characters.
   c. Click **Go**:.
   d. Select the group’s name from the list.

   The Resource Assignment window displays the name of the individual or group in the list of resources assigned to this campaign schedule.
7. Click **Update**.
8. Repeat this procedure for each campaign schedule you want to assign.

5.12 Enabling Oracle eMail Center

A Telesales Agent can click an e-mail address in Oracle TeleSales to open an e-mail addressed to the customer and send it through the eMail Center. The e-mail is then recorded as an interaction. Perform the following tasks to enable eMail Center:

1. Perform the implementation steps per Oracle Email Center documentation.
2. Set the system profile option *OTS: Enable Email Center Integration* to Yes.
3. For each TeleSales Agent, perform the following steps in Resources:
   a. Select iCenter for Role Type.
   b. Select eMail Center Agent for Roles.

5.13 Enabling Interaction Tracking and Wrap-up

Oracle TeleSales can track customer-related interactions by agents and record the outcome of those interactions, the wrap-up.

5.13.1 Interaction Overview

Oracle TeleSales can track agent interactions (also referred to as touch points) with customers and the different activities within those interactions. The activities an interaction can track includes the modifying and closing of leads and opportunities, the enrollment of contacts in events, the mailing of collateral, the placing of calls to customers, and so on.

The interaction records an activity whenever an agent:

- Creates a new party of any party type.
- Creates a lead
- Ranks a lead
- Declines lead
- Creates an opportunity
- Closes an opportunity
- Enrolls customers or prospects in an event
- Cancels enrollment
- Sends collateral
- Creates a task
- Queries and views a record

Each activity is itself composed of an action and the object of that action, this is called an "action item". Interactions track and record the following actions and action items.

Actions:

- Item added
- Lead ranked
- Lead declined
- Opportunity closed
- Event enrollment
- Event enrollment cancelled
- Item Sent
- Query

Action Items:

- Customer

- Lead
- Opportunity
- Event
- Collateral
- Task

Agents can start an interaction at any time while working in the Opportunity Center, the Lead Center, or the eBusiness Center, by clicking the Start Interaction button on the toolbar. When agents end the interaction by clicking on the Wrap-up button, they enter information about the outcome of the interaction in the wrap-up window. The interaction record lists all the activities the agent performed while the interaction was open.

You can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever an agent queries up or modifies a customer record and ends when an agent queries up a record belonging to another party or closes the form where the interaction began.

You can set up interactions to require agents to record the outcomes of their interactions with customers in a wrap-up window or merely record a default outcome.

How the Application Tracks Interaction Activities for Party Relationships

Interaction activities recorded for any of the party types which make up a party relationship are recorded as being part of the same interaction. For example, if an agent starts tracking an interaction with *Jim Jones: the CEO of Acme Corp.*, then any activity related to any of the following parties are treated as part of the same interaction.

- Jim Jones
- Acme Corp.
- Jim Jones: the CEO of Acme Corp.

Switching between any of these parties does not close the interaction.

The customer model used by Oracle TeleSales treats any relationships you enter between individuals and organizations as a separate party in the database. For example, when the user creates a new record for Jim Jones, CEO of Acme Corp. the application creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

5.13.2 Setting Up Interaction Tracking

To set up interaction tracking you must:

1. Set up the system profiles telling the application what activities you want interactions to track. See Section 5.13.3, "Deciding What Actions You Want Interactions to Track" on page 5-25.
2. If desired, set up automatic interaction tracking. Section 5.13.4, "Setting Up Oracle TeleSales to Track Interactions Automatically" on page 5-29.
3. If you are implementing Oracle Advanced Inbound or Oracle Advanced Outbound and want agents to be able to see their call statistics in the Wrap Up window, then perform the implementation steps in the *Oracle Interaction Center Intelligence Implementation Guide.*
4. If you want agents to record the outcomes of their interactions on the wrap-up window, then:
    a. You must create the categories of outcomes, results, and reasons the agents will use for their call wrap-up. See Section 5.13.6, "Creating Outcomes, Results, and Reasons for Call Wrap-Up" on page 5-32.
    b. Optionally, you can restrict different outcomes to different campaign schedules. This way agents working on different marketing campaigns can have access to a different list of outcomes. See Section 5.13.7, "Assigning Outcomes to Campaign Schedules". on page 5-32.

5.13.3 Deciding What Actions You Want Interactions to Track

Forms Navigation

Profiles > System

You must set up the following profile options which decide which activities record interactions. This applies to both manual and automatic interaction tracking.

- **OTS: Interactions-Generate Collateral Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to collateral.

  No: Disables interaction tracking for the creation of collateral orders.

- **OTS: Interactions-Generate Customer Activity**

Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Tracks activities related to customer records.

No: Disables tracking of activities related to customer records.

- **OTS: Interactions-Generate Event Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to events.

  No: Disables tracking of activities related to events.

- **OTS: Interactions-Generate Lead Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to leads.

  No: Disables tracking of activities related to leads.

- **OTS: Interactions-Generate Opportunity Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to opportunities.

  No: Disables tracking of activities related to opportunities.

- **OTS: Interactions-Generate Query Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Records queries as activities. 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.

- **OTS: Interactions-Generate Service Request Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to service requests.

No: Disables tracking of activities related to service requests.

- **OTS: Interactions-Generate Task Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Records the creation of new tasks.

  No: Disables the recording of task creation.

- **OTS: Interactions-Default Outcome**

  Default setting: Maintenance

  This profile determines the default value of the Outcome field in the wrap-up window.

  This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome associated with the campaign schedule for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign schedule.

  If the default value for the profile option is removed, then the application functions as if the value is *Outcome with outcome id = 1 (No Answer).*

- **OTS: Interactions-Default Action**

  Default setting: Interact with the Item

  Users must perform at least one activity for the interaction to end. If user doesn't perform any activity but ends the interaction anyway, then the application uses the default action set in this profile and the default action item from the profile OTS: Interaction -Default Action Item.

  If the default value for the profile option is removed, then the application functions as if the value is *Query.*

- **OTS: Interactions-Default Action Item**

  Default: Customer

  The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction -Default Action whenever the user does not perform an action required to wrap up an interaction.

  If the default value for the profile option is removed, then the application functions as if the value is the module name where the interaction is started. For example, if an interaction is started in opportunity center, then it is *Opportunity.*

- **OTS: Interactions-Record Media Item ID**

  Default setting: Yes (If the default setting is removed, then the application operates as if the profile is set to Yes.)

  Interactions track different types of communications with customers including emails and phone calls placed via Oracle inbound and outbound telephony applications. The record includes a unique identifier for the communication. This profile determines if that unique identifier is recorded or not. This identifier is never displayed for the user.

  A setting of Yes records the identifier. A setting of No does not record the identifier.

- **OTS: Max Interactions Displayed**

  Default setting: 10 (If the default setting is removed, then the application operates as if the profile is set to 10.)

  Determines how many interactions to display in the overview tab.

- **OTS: Number of Months to View Notes and Interactions For**

  Default setting: 1 (If the default setting is removed, then the application operates as if the profile is set to 1.)

  This is the number of months of notes or interactions to view.

- **OTS: Generate Query Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Records the account number with any recorded interaction.

  No: Does not record the account number for an interaction.

5.13.4 Setting Up Oracle TeleSales to Track Interactions Automatically

Forms Navigation

Profiles > System

To track interactionstomatically, you must set up the following additional system profiles:

- **OTS: Interactions-Enable Automatic Start**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  A Yes setting for this profile option enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting interactions manually.

- **OTS: Interactions-Start on Query**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  A setting of Yes starts an interaction whenever the user displays a new record from a different party. For example, if the user is working on an opportunity for AT&T Corp. and opens up a lead from Acme Corp., then the application closes the first interaction and opens up a new one for Acme Corp. If both the opportunity and lead come from AT&T, then no new interaction is started.

  A setting of No starts a new interaction only when the user updates or deletes information in a record or creates a new record for a new party. The user working on an opportunity for AT&T Corp.has to update the lead from Acme Corp. before the application starts a new interaction for Acme. Merely viewing the lead will not close the AT&T interaction.

- **OTS: Interactions-Enable Auto Wrapup**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  When this profile is set to No, the wrap-up window appears automatically prompting users to enter the outcomes and reasons for the activity.

  When this profile is set to Yes, then the interaction ends automatically without the users seeing the wrap-up window.

  The interaction ends when:

- The user starts work on a record from a different party.

  Whether this happens on update or query depends on the setting of OTS: Interactions -Start on Query, as described above.

- The user closes the window where the interaction was started.

  For example, if a user starts an interaction while viewing an opportunity in the Opportunity Tab of the eBusiness Center and then opens that same opportunity in the Opportunity Center, then the interaction does not end when the user closes the Opportunity Center. It ends only when the user closes the eBusiness Center.

  Note: In this release, the wrap-up screen appears automatically only when users close the form using the close button at the top right hand side of the form. If they close the form using the close button on the toolbar or by choosing Close Form from the File menu, then the interaction is closed automatically without opening the wrap-up window.

- **OTS: Interactions-Enable Change Activity**

  Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Set to Yes to allow allows user to change system recorded activities in the wrap-up window.

The following examples illustrate the use of these profile settings:

Example: Enabling Automatic Interaction Tracking for Opportunities

Imagine, for example, that you want to enable automatic interaction tracking for all agent activities relating to opportunities and you want the tracking to start whenever an agent updates a record. You want the tracking to happen in the background, without the agent having to perform any extra data entry.

You must set the following system profiles to the values indicated:

- **OTS: Interactions-Enable Automatic Start**

  Setting this profile to Yes enables the automatic tracking.

- **OTS: Interactions-Generate Opportunity Activity**

Setting this profile to Yes enables the tracking of activities related to Opportunities.

- **OTS: Interactions-Start on Query**
- Setting this profile to No means that interaction tracking starts only when a record is updated for the first time.
- **OTS: Interactions-Enable Auto Wrapup**

  Setting this profile to Yes means that the interaction ends automatically without agents having to make entries in the wrap-up window.

The interaction ends automatically when the agent closes the window where the interaction was first started or changes the object the interaction relates to. For example, if a user opens up the eBusiness Center and from the Opportunity tab then opens the Opportunity Center, then the opportunity interaction ends when the user starts a new opportunity in the Opportunity Center.

Because the application must record at least one activity for an interaction to end, you must set up the default activity which is recorded if an agent closes a window without performing any of the activities. To set up the default activity, you must set two related profiles OTS: Interactions Default Action and OTS: Interactions Default Action Item.

5.13.5 Setting up Multiple Simultaneous Interactions

It is possible to track more than one interaction at one time. Each Center can track only one interaction at a time, but you can open additional centers and start interactions in each. For example, you can open two Opportunity Centers and one eBusiness Center and start interactions in all three.

Forms Navigation

Profiles > System

To track multiple interactions simultaneously, you must set up the following additional system profiles:

- **OTS: Interactions - Maximum multiple interactions**

  Default setting: 1

  Set the maximum number of simultaneous interactions. If you are using Oracle Collections, then set to 1.

- **OTS: Interactions - Prompt for Wrapup**

Default setting: Yes

If this profile is set to Yes, then when the user starts a second interaction while a first interaction is already started the user is prompted with "The current [eBusiness / Opportunity / Lead] Center is currently tracking interaction for another party. Would you like to wrap up the interaction?" When the user selects Yes, either auto wrap up proceeds or the wrap up window appears (based on profile setups) and then the next interaction begins in that center. If the user selects No, then the first interaction continues and a new center opens with the next interaction.

5.13.6 Creating Outcomes, Results, and Reasons for Call Wrap-Up

If you want agents to record the outcomes of interactions with customers using the wrap-up window, then you must populate the different lists of values the agents will use for that purpose. This means setting up the different outcomes, results, and reasons.

You also define valid combinations of outcome, result, and reason for wrap-up. What options appear in the LOVs in the Wrap-Up window depend upon the combinations set here. The combinations can be defined for interaction and activity level. You can also specify whether an outcome requires a result, and a result requires a reason. The end date deactivates the outcome, result, and reason in LOVs in the Wrap-Up window.

See the Interaction History section of the *Oracle CRM Applications Foundation Implementation Guide* for details.

The forms based administration windows for creating outcome, result, and reason are obsoleted. The HTML pages now used to set these up are available using the web responsibility of Interaction History JSP Administration.

5.13.7 Assigning Outcomes to Campaign Schedules

If you assign outcomes to marketing source codes, then agents who are working with customers classified by different source codes can have different outcome classifications available to them to wrap up calls. For example, you may want to use "leave message" as a possible outcome for a customer satisfaction campaign, but not for a sales campaign.

Although sales agents see all marketing activities as source codes, you must assign the outcomes only to the marketing activity called a campaign schedule. Campaign schedules must be created in Oracle Marketing.

See the Interaction History section of the *Oracle CRM Applications Foundation Implementation Guide* for details.

The forms based administration windows for creating outcome, result, and reason are obsoleted. The HTML pages now used to set these up are available using the web responsibility of Interaction History JSP Administration.

5.14 Enabling Web Directory Assistance

Applies to: TeleSales

Use this procedure to enable web directory assistance for agents.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Sales Administrator

Navigation

Administration > Sales > Call Center > Web Assistance

Steps

The Web Assistance page appears.

1. Click **Create Web Assistance**.

   The Create Web Assistance page appears.

2. Using another browser window, navigate to the web directory assistance service you want to use.

3. Perform a search for any individual. For example, for John Doe in California.

   Keep the page with the results open. You will need to refer to it for the rest of this procedure.

   For example, navigate to www.superpages.com, select the People Pages tab, and search for John Doe in California.

The search returns a page with the following URL:

```
http://wpg2.superpages.com/wp/results.phtml?SRC=&STYPE=WS&PS=15&PI=1&WF=John
&WL=Doe&T=&S=CA&search=Find&pow=0&rtd=wpg1.superpages.com
```

4. In the Proxy Host field, enter the name of your organization's proxy server.
5. In the Port field, enter the port number for the proxy server.
6. In the Search URL field, enter the part of the URL before the question mark (?).

   In the SuperPages.com example, you copy and paste the following: `http://wpg2.superpages.com/wp/results.phtml`
7. In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant when you perform different searches.

   > **Note:** You may need to perform additional searches to determine what portion of the URL remains constant.

   In the SuperPages.com example this is: `SRC=&STYPE=WS&PS=15&PI=1`.
8. In the Trailer Constant field, enter the constant part of the URL after the search terms.

   In the SuperPages.com example this is: `&search=Find&pow=0&rtd=wpg1.superpages.com`.
9. Enter the switch separator. The switch separator is always the ampersand (&).
10. Enter the URL separator. The URL separator is always the question mark (?).
11. Click **Update.**

    The Web Assistance page displays the web assistance you saved.
12. Click **Detail** for the web assistance you created.

    The Web Assistance Details page appears.
13. Click **CGI Switches**.

    The Oracle Collections Web Directory Administration page displays switch information for the web directory.
14. Create each switch to include in the search. The switches are the CGI script variables used for your search criteria. Each switch is followed by an equals (=)

sign. In the SuperPages.com example these are: `WF`, `WL`, `T`, and `S`. For each switch:

a. Click **Create.**

   The Create CGI Switch page appears.

b. Enter the switch in the Switch Code field. The entry is case sensitive.

c. Enter a number in the Sort Order field indicating the order this switch appears in the URL.

d. Enter plus (+) for the data separator.

e. Select Y next to the search criteria related to this switch. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.

f. Set the Enable field to Y. Any disabled switch has a corresponding disabled field on the Directory Assistance page.

g. If user entry for this switch is required by the web assistance service, then select Y for the Required field. Look on the search web page to find out what fields are required. In the SuperPages.com example last name is the required field.

h. Click **Update**.

   The Web Assistance Details page displays the new switch.

15. After testing your settings, set Enabled to Y.

Note: You can enable only one service at a time.

16. Select yes or no for the directory assistance flag. Only one web directory can be used for directory assistance.

17. Click **Update** to save your changes.

5.15 Setting Up Relationship Plan

Oracle TeleSales uses the relationship plan feature in Oracle Customer Care. Relationship plans are available for the party type of organization only. Follow the implementation steps in the *Oracle Customer Care Implementation Guide* if you want to use this feature.

To enable the relationship plan, set the following profile option:

OTS: Relationship Plans - Enable Relationship Plans

Levels: All levels

Set to Yes to enable.

5.16 Setting Up Address Validation

Address validation is used for ensuring that the combination of different components of an address is correct. For example, City = Redwood Shores, State = CA, Postal Code = 94065 should be in a valid combination for a given address in the United States. This is enforced based on the profile option *OS: Enable Address Validation*.

Address validation is used when creating a location for which the Address Style descriptive flexfield has not been set up. The validation is based on the tax location flexfield structure set up using the System Options form in the Receivables Manager responsibility. For details refer to the *Oracle Receivables Tax Manual*.

5.17 Setting Up the Dashboard

Follow the instructions in the *Oracle Customer Care Implementation Guide* to set up the dashboard.

5.18 Setting Up the At A Glance Window

The At A Glance window displays a customer's recent activities. The user can launch an action from the summary of information.

5.18.1 Identify Policies

This is a required step. The information in the window comes from materialized views that are periodically updated. Identify if any policies exist in the following tables. See the topic "Fine-Grained Access Control" in the "Establishing Security

Policies" chapter of the *Oracle 8i Application Developer's Guide* - *Fundamentals Release 2 (8.1.6)* for information about security policies.

Fine-Grained Access Control

Fine-grained access control allows you to build applications that enforce security policies at a low level of granularity. You can use it, for example, to restrict a customer who is accessing an Oracle server to see only his own account, a physician to see only the records of her own patients, or a manager to see only the records of employees who work for him.

When you use fine-grained access control, you create security policy functions attached to the table or view on which you have based your application. Then, when a user enters a DML statement (SELECT, INSERT, UPDATE, or DELETE) on that object, Oracle dynamically modifies the user's statement--transparently to the user--so that the statement implements the correct access control.

Security Policy

Security policy defines who is allowed access and to which data. Various means are available within Oracle8i for enforcing security policies including, but not limited to, privileges, roles, the virtual private database feature, and network authentication and authorization.

We are concerned only about Table-based Security Policies for the tables used in the materialized views for the At a Glance feature. Following is a list of tables used in the materialized views for At a Glance that might have table-based security policy functions set up for fine-grained access control:

ASO_QUOTE_HEADERS_ALL

ASO_QUOTE_STATUSES_B

ASO_QUOTE_STATUSES_TL

AS_INTERESTS_ALL

AS_INTEREST_CODES_B

AS_INTEREST_CODES_TL

AS_INTEREST_TYPES_ALL

AS_INTEREST_TYPES_B

AS_INTEREST_TYPES_TL

AS_LEADS_ALL

AS_SALES_LEADS

AS_SALES_LEAD_RANKS_TL

AS_SALES_STAGES_ALL_TL

AS_STATUSES_B

AS_STATUSES_TL

FND_APPLICATION

FND_APPLICATION_TL

FND_LOOKUP_VALUES

FND_USER

HZ_CUST_ACCOUNTS

HZ_PARTIES

HZ_RELATIONSHIPS

JTF_OBJECTS_B

JTF_OBJECTS_TL

JTF_RS_RESOURCE_EXTNS

JTF_RS_SALESREPS

JTF_TASKS_B

JTF_TASKS_TL

JTF_TASK_PRIORITIES_TL

JTF_TASK_STATUSES_B

JTF_TASK_STATUSES_TL

JTF_TASK_TYPES_TL

OE_SALES_CREDIT_TYPES

If policies exist, then perform the following steps:

1. Identify the tables.
2. Set the profile option *OTS: At a Glance* - *Execute Callouts for Data Refresh* to Yes.
3. Customize the MView_Refresh_Pre and MView_Refresh_Post procedures (package body) within the package AST_MVIEW_REFRESH_CUHK.

In order for the materialized view to work correctly, any fine grain access control procedure in effect for the query must return a null policy when the materialized view is being created or refreshed, otherwise error 'ORA-30372 fine grain access policy conflicts with materialized view' will be raised.

There are five materialized views based on more than twenty tables owned by other products. Since we have no control on what policy and when the policy may be applied on those tables, we add the callout AST_MVIEW_REFRESH_CUHK (astchmvs.pls) in our creating / refreshing materialized view logic. If there is any table policy that causes the ORA-30372 error in creating / refreshing these materialized views, you can create your own package body for AST_MVIEW_REFRESH_CUHK to make that policy return NULL or disable the policy in AST_MVIEW_REFRESH_CUHK.Mview_Refresh_Pre and rollback the change in AST_MVIEW_REFRESH_CUHK.Mview_Refresh_Post.

Package AST_MVIEW_REFRESH_CUHK is defined as:

```
PACKAGE AST_MVIEW_REFRESH_CUHK AS

PROCEDURE MView_Refresh_Pre(
   p_mview_name   IN VARCHAR2,
   x_return_status         OUT NOCOPY VARCHAR2,
   x_msg_data              OUT NOCOPY VARCHAR2
);

PROCEDURE MView_Refresh_Post(
   p_mview_name   IN VARCHAR2,
   x_return_status         OUT NOCOPY VARCHAR2,
   x_msg_data              OUT NOCOPY VARCHAR2
);
END AST_MVIEW_REFRESH_CUHK;
```

Only when profile *OTS: At a Glance - Execute User Callouts For Data Refresh* is set to Yes, the callouts will be executed. MView_Refresh_Pre will be called before creating / refreshing each materialized view, and MView_Refresh_Pre will be called after creating / refreshing each materialized view. For callouts, only package spec is shipped, so customer must implement his own package body for AST_MVIEW_REFRESH_CUHK before setting the above profile to Yes.

Following is an example of the package body for AST_MVIEW_REFRESH_CUHK:

```
CREATE OR REPLACE PACKAGE BODY AST_MVIEW_REFRESH_CUHK AS
```

```
PROCEDURE MView_Refresh_Pre(
   p_mview_name   IN VARCHAR2,
   x_return_status        OUT NOCOPY VARCHAR2,
   x_msg_data              OUT NOCOPY VARCHAR2
) IS
BEGIN
x_return_status := 'S';
x_msg_data := 'Success';
if(p_mview_name = 'AST_QUOTES_MV') then
hz_common_pub.disable_cont_source_security;
end if;
EXCEPTION
when OTHERS then
x_return_status := 'E';
x_msg_data := sqlerrm;
END;

PROCEDURE MView_Refresh_Post(
   p_mview_name   IN VARCHAR2,
   x_return_status        OUT NOCOPY VARCHAR2,
   x_msg_data              OUT NOCOPY VARCHAR2
) IS
BEGIN
x_return_status := 'S';
x_msg_data := 'Success';
if(p_mview_name = 'AST_QUOTES_MV') then
hz_common_pub.enable_cont_source_security;
end if;
EXCEPTION
when OTHERS then
x_return_status := 'E';
x_msg_data := sqlerrm;
END;

END AST_MVIEW_REFRESH_CUHK;
```

5.18.2 Customize the Menu

This is an optional step. You can customize what appears in the At A Glance window by customizing the existing *OTS: At a Glance Display Menu* or creating your own menus.

Your created menus can have only the seeded functions for the appropriate business objects. Following is a list of the seeded functions:

Function Name	User Function Name
AST_INTERESTS_MV	At a Glance – Product Interests
AST_OPPORTUNITIES_MV	At a Glance – Opportunities
AST_QUOTES_MV	At a Glance – Quotes
AST_LEADS_MV	At a Glance – Sales Leads
AST_TASKS_MV	At a Glance – Tasks

The system profile option *OTS: At a Glance Display Menu* assigns what menu is applied to the window for different users. This profile option can be set at the site, application, responsibility and user levels. The default site value is the menu *OTS: At a Glance Display Menu*.

5.18.3 Run Concurrent Program

This is a required step.

1. Set the system profile option *OTS: At a Glance* **-** *Number of Months of Data to Show* to 3 or 6 months. Default is 3.
2. Determine what business objects were used in your menus.
3. Run the concurrent program OTS: At a Glance **-** Refresh Business Objects

   Parameters: Each business object determined in step 2.
4. Schedule this concurrent program (or set of concurrent programs) to run periodically. The frequency determines the timeliness and accuracy of the information that appears in the At a Glance window. The At a Glance window displays no information while the concurrent program is running.

5.18.4 Customize the Criteria

This step is optional. You can change the nodes in the summary section which also changes the option in the drop down View lists. Follow the procedure for setting up the dashboard in the *Oracle Customer Care Implementation Guide.* Use only the following mapping in the dashboard setup. Only the materialized views listed below should be used in the profile variable queries. Also, dashboard profile variables/checks can be created only for the following dashboard categories.

Dashboard Category	Materialized View Name	Business Object
INTERESTS	AST_INTERESTS_MV	Product Interests
OPPORTUNITIES	AST_OPPORTUNITIES_MV	Opportunities
QUOTES	AST_QUOTES_MV	Quotes
LEADS	AST_LEADS_MV	Sales Leads
TASKS	AST_TASKS_MV	Tasks

The following profile controls how the count is displayed in the summary section:

OTS: At a Glance - Enable Dashboard Data Refresh at form startup

Yes: Runs the Customer Profile Engine concurrent program to refresh the summary section for the queried party every time the At a Glance window is opened by any user. (The window opens more slowly when set to Yes.)

No: You need to add the Customer Profile Engine concurrent program with the following parameters to the schedule to periodically refresh the count information in the summary section. Be sure it runs after the concurrent program *OTS: At a Glance - Refresh Business Objects* is run.

Parameters: The dashboard groups are your parameters. If you did not customize. then select the following three seeded dashboard groups:

- OTS: At a Glance Organization Group
- OTS: At a Glance Person Group
- OTS: At a Glance Relationship Group

Customer Profile Engine is a concurrent program that is part of the Customer Care dashboard setup. Please refer to the *Oracle Customer Care Implementation Guide* for more details on setting up this concurrent request.

5.18.5 Set up Window Title

This step is optional.

By default, the window title will show the party name followed by the primary phone number, city and country name. Your administrators can create a custom query for a dashboard profile variable with code to set the window title according to their needs. The only bind variable allowed is party_id and it should be part of the query as ':party_id'. Please note that the total length of the window title (including the party name which is displayed always before any customization) cannot be more than 250 characters

As part of the Customer Care dashboard setup create a profile variable with the following variable code:

AST_AT_A_GLANCE_WINDOW_TITLE

5.18.6 Set the title for the Business Objects

This step is optional. You can change the titles for each business object that appears in the window by changing the meaning for the following lookup codes for lookup type **OTS: At a Glance Business Objects:**

Lookup Code	Current Meaning
AST_INTERESTS_MV	Product Interests
AST_OPPORTUNITIES_MV	Opportunities
AST_QUOTES_MV	Quotes
AST_LEADS_MV	Sales Leads
AST_TASKS_MV	Tasks

5.18.7 Customize the Action Drop Down Menu

This step is optional. You can change the text for the Action drop down menu by changing the meaning for the following lookup codes for lookup type **OTS: At a Glance Actions:**

Lookup Code	Current Meaning
AST_RC_ALL	Launch eBusiness Center
AST_EBC_SLD	Create Lead
AST_EBC_OPP	Create Opportunity
AST_EBC_TSK	Create Task
AST_EBC_QTO	Create Quote
AST_CU_ORD	Create Order
AST_EBC_SR	Create Service Request
AST_NT_TAB	Create Note

5.19 Setting Up Web Collaboration

If you want users to be able to join or start a meeting from the eBusiness Center, Opportunity Center, or Lead Center, then set up your web collaboration software. If you are using Oracle iMeeting, then set it up per the instructions in the *Oracle iMeeting Implementation and Setup Guide*. In addition, the Web Collaborate toolbar and menu item are enabled only when both of the following profiles are set up. The Start Page for the web collaboration is necessary to enable web collaboration.

- **OTS: Enable Web Collaboration**

  Default Setting: No

  Set to Yes. The option "Web Collaborate" will appear on the user’s Action menu.

- **OTS: URL for Web Collaborate Start Page**

  Default Setting: None

  Enter the URL that becomes the start page when a user starts a new meeting. For example, **`http://imeeting.oracle.com`** or **`http://www.webex.com/meeting`**.

5.20 Setting Up Universal Search for Collections Objects

If you are using Oracle Collections you need to enable the Collections objects in Universal Search.

Login

TeleSales Administrator

Navigation

OTS: Quick Codes

Steps

1. Perform a Query Enter, Query Run for the Lookup Type: AST_SEARCH_VIEW_BY_LIST.
2. Enable the following Lookup Codes:
   - ACCOUNT
   - DISPUTE
   - PAYMENT

- PROMISETOPAY
- TRANSACTION

3. Save your changes.

5.21 Integrating with Oracle Order Management

The integration with Oracle Order Management provides the ability to create new orders, view an individual order, and view a list of orders for a customer in the eBusiness Center.

Viewing and Creating Orders in an Order Form

If you installed the OM.I patch, then you can create orders without needing existing quotes by clicking the Create button on the Order tab in the eBusiness Center. Set the following profile option to determine the form the orders appear in.

OM: Sales Orders Form Preference

Set to either Classic sales order form or Quick Sales Order Form

Default: Classic

Then add the sales order form you selected in the profile option to the TeleSales Agent Menu or the TeleSales Manager Menu.

Viewing Orders on the Order Tab of the eBusiness Center

Set the following system profile options to view orders in the Order tab.

- OTS: Order History - Default value for the Filter

  Sets the Order tab default filter. Options are Order Status, Order Type, Order Source, or null.

- OTS: Order History - Number of months to Display Orders

  Determines the default from, to date range for the Order tab. It is the number of months before the current date.

- OTS: Order History View Orders across Operating Units

  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.

5.22 Integrating with Oracle Contracts Modules

A user can view the details for a contract from the Contract tab in the eBusiness Center only if the menu *Define Coverage Template* is added to the TeleSales Agent Menu.

Part III

Post Implementation Tasks

This section contains the following chapters:

6

Verifying the Implementation

This topic group provides you with steps necessary to verify implementation of Oracle Sales Online:

- Section 6.1, "Implementation Verification Tasks" on page 6-1
- Section 6.2, "Performance Tuning" on page 6-2

6.1 Implementation Verification Tasks

To verify that you properly implemented Oracle Sales Online, perform the following tasks.

For information on the procedures necessary to perform these tasks, see the *Oracle Sales Online User Guide*.

1. Create an opportunity.
2. Use the Select a Customer field and enter the full or partial name of the organization or person that you want to find. By default the system will search for organizations.
3. Enter details for the opportunity.
4. Click **Create**.

If you can successfully create an opportunity, the basic functions of the product are working. Conditional dependency functionality is based upon the other modules that you are using. Please refer to Section 2.4, "Mandatory Dependencies" and Section 2.5, "Conditional Dependencies" for more information.

6.2 Performance Tuning

Customers should gather new statistics after the completion of an upgrade or installation and thereafter gather statistics monthly. However, objects with a high throughput and data volumes may require that statistics are gathered more frequently.

6.2.1 Gathering Statistics Concurrent Requests

Running these concurrent request will assist you with faster performance in Sales Products.

The following concurrent requests are available in Oracle Applications for gathering statistics:

- Analyze All Index Columns
- Backup Table Statistics
- Gather Schema Statistics
- Gather Table Statistics
- Restore Table Statistics

Please refer to the Oracle Application System Administration Guide for concurrent request parameters.

Part IV

Appendixes

This section contains the following appendixes:

- Appendix A, "System Profile Options"
- Appendix B, "Concurrent Programs"
- Appendix C, "Lookups"
- Appendix D, "Implementing Oracle Sales Offline Edition"

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	(obsolete) 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	(obsolete) 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	(obsolete) 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	(obsolete) ASL: Enable Configurator	Field Sales/Lap top				
obso lete	obso lete	(obsolete) ASL: Enable Encyclopedia	Field Sales/Lap top	Marketing Encyclope dia			
obso lete	obso lete	(obsolete) 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		CONVE RTED_ TO_ OPPOR TUNIT Y
		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	Opportuni ties	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.		Allowe d 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 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, 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 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	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		

Req.	New	Profile Name	Product	Functions	Description	Level	Default
N	Y	OS: Organization Original System Reference URL	TeleSales	eBusiness Center: Organizati on 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 Relationsh ips	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	Opportuni ties	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	Opportuni ties	Privilege to change the opportunity owner.	U	No
		OS: Project name required	TeleSales Sales Online	Lead manageme nt	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 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	Opportunity	Determines if a list of values or drop down menu will be used to select a product category on the opportunity detail page. If set to Yes, application will use a list of values. If set to No, application will use a drop down list. Using a list of values may have a positive impact on the speed of the application.		No
		OSO: Use Product Category LOV	Sales Online	Opportunity	If set to "Yes" the product category on the opportunity purchase items table (in opportunity create and detail pages) is displayed as a list of values (LOV) with a Go button, instead of a drop down list.		No
		OSO: Wireless User Device	Sales Online		Wireless 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, Opportunity	Sets the default value of days for leads and opportunities	ASRU	
		OTS: Number of Months to view Notes and Interactions for	TeleSales	eBusiness Center	Default value for months of notes/interactions to view. 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	Opportunity 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	Organizations, 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

Concurrent Programs

This appendix provides a table of all of the concurrent programs used by the Oracle Sales Family of eBusiness Suite applications. Each concurrent program in this table is also described in the implementation step where it is set.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Sales Online)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)

B.1 Running Concurrent Programs

The procedure for running concurrent programs is the same for all Oracle applications.

Steps

1. Log in to the Forms application.
2. Select the Oracle Sales Administrator responsibility.
3. Double-click **Concurrent Requests**.
4. Double-click **Run**.

5. Select the Single Request radio button.
6. Click **OK**.
7. Search for the concurrent request that you want to run.
8. Click **Submit**.
9. Select from the search results.
10. Click **OK**.
11. Click **OK** to run the concurrent request.

For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

B.2 Table of Concurrent Programs

The following table lists by name and in alphabetical order the concurrent programs used by the Oracle Sales Family of eBusiness Suite applications. The table includes the following columns from left to right:

- **Mandatory:** Is the program mandatory for the function?
- **Concurrent Program Name:** Name of the concurrent program.
- **Description:** Explains what the concurrent program does.

Mandatory	Concurrent Program Name	Description
No	Assign Territory Accesses	This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing. Set the following profile options to 100000000 or more. OS: Sort Area Size for TAP OS: Hash Area Size for TAP Run this program after completing the setups in Setting Up Territory Management, and after the JTF Concurrent program "Generate Territory Package" has run. Parameters: Run Mode (New / Total) Lead Status: (All / Open / Closed) Previous Request ID for restart mode only.
No	Autocreate Opportunity from Sales lead	Creates opportunities from existing sales leads. This program should be run after the Import Sales Leads program. Parameters: Debug Mode Trace Mode
No	Calculate Party Totals	Calculates customer order information gathered in Oracle Order Management. It calculates the last ordered date and the lifetime value or a customer. The lifetime value is a sum of all orders in Order Management.
No	Drop Temp Tables for Home Page Materialized Views	This will clean up all the Temp tables that were created during the Initial Load or Opportunity and Leads Reports bin jobs. This does not require any parameters.
	Flatten Employee Hierarchy	This concurrent program is ONLY meant to populate data in resource manager internal tables in order to expedite data display in "Organization" link for Employee hierarchy. Schedule: For about 100,000 employees, this program takes about 2-3 minutes to run. It can be scheduled as a nightly process.
	Flatten Group Hierarchy	This program is used to denormalize the Resource Group hierarchy structure into a flat structure for fast and easy data access. Schedule: For about 4000 groups, and average of 10 level hierarchy structure, this program takes about 10-15 minutes. It can be scheduled as a nightly process.

Mandatory	Concurrent Program Name	Description
No	Generate Access Records	This is a child program of Assign Territory Accesses and does not need to be run separately.
	Generate Keys for Fuzzy Match	This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically
	Generate Territory Packages	This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.
No	Index Creating for Missing Indexes for Materialized Views	This will create any missing index for the materialized views and reanalyzes the materialized view tables. This does not require any parameters
Yes	Initial Build of Forecast Summary Tables	This program will build the materialized view used for forecasting. This program must be run initially before users can forecast. Run after Refresh AS_PERIOD_DAYS, Refresh of AS_PERIOD_RATES, and Refresh of AS_SALES_CREDITS_DENORM.
Yes	Initial Build of Opportunity and Lead Bins	Used for the Opportunity and New Leads home page bins and reports. This program must be run initially before users can set up opportunity and new leads bins and reports. This program loads the opportunity and leads materialized view with sales credit information. A new parameter: "Next Extent Size" has been added. You can choose the value of the next extent to be allocated for all tables and indexes created. Possible values for the parameter are: Small (1M), Medium (5M), Large (10M) **Note:** This program must be run anytime the as_sales_credit_denorm is rebuilt or when values such as sales stages and statuses have changed. You should also run when Refresh AS_PERIOD_DAYS is run.

Mandatory	Concurrent Program Name	Description
No	Initial Load of Opportunity Log Tables	This program will load data from the opportunity transaction tables AS_LEADS_LOG, AS_LEAD_LINES_ALL, AS_SALES_CREDITS to the corresponding log tables AS_LEADS_LOG, AS_LEAD_LINES_LOG, AS_SALES_CREDITS_LOG if the transaction data does not have log record in the log tables. The following profile options need to be set to "Yes" before submitting the concurrent program: OS: Enable Tracking Opportunity History Data, OS: Enable Tracking Purchase Line History Data, and OS: Enable Tracking Sales Credits History Data.
Yes	Initial Load for Lead Reports	This program is used to build Leads bins and reports. This should also be run following Refresh of Leads Bins Data so that you can see the latest values in leads reports.
Yes	Initial Load for Opportunities Reports	This program is used to build opportunity bins and reports. This should also be run following Refresh of Opportunity Bins Data so that you can see the latest values in opportunity reports.
No	Load Interest Types and Codes to Inventory Categories (Load Categories)	This concurrent program creates inventory categories under the inventory category set "Oracle Sales and Marketing" for each combination of interest types and codes. In order to use this concurrent program, the OS: Inventory Category Integration profile value must be set to Yes.
(obsolete)	Opportunity Exchange - Get Opportunities	(obsolete) This program will poll the LETS server and retrieve the relevant partner opportunity details. This program should be run at regular intervals by users with Opportunity Exchange privileges.
(obsolete)	Opportunity Exchange - Push Opportunities	(obsolete) This program will send the information to the LETS server to be picked up by the partners. This program should be run at regular intervals by users with Opportunity Exchange privileges.
No	OTS: Load Sales Lead Interface Table from Flat File	Use this program to import sales leads from the interface. This program must be run before Auto Create Opportunity from Sales Lead. This moves data from the interface table to AS_SALES_LEADS, AS_SALES_LEADS_LINES, and AS_SALES_LEAD_CONTACTS. If you want to import data from a flat file, you must first run OTS: Load Sales Lead, which will move data from the flat file to the interface table.
Yes	Periodically Purge ASF_RECORD_VIEW_HISTORY	This table memorizes which records a user has visited. In order to prevent the table from growing too large, the program should be run as least once a week. If you are running on a database whose table space is a problem, run this program daily.

Mandatory	Concurrent Program Name	Description
Yes	Purge Deleted Lists	This program should be scheduled to run periodically. The time interval between any two schedules for this program should be at least the number of days specified for ASF_LIST_MIN_PURGE_AGE_IN_DAYS profile for maximum effectiveness. The program does not take any parameters. A value of 10 is set for this profile (ASF_LIST_MIN_PURGE_AGE_IN_DAYS) and the concurrent program may be scheduled to run every 14 days if the profile has not been modified. These are suggested values for the profile and for periodically scheduling the concurrent program. They may be altered depending on whether a large or small number of lists are created or deleted within a short time period.
No	Refresh AS_PERIOD_DAYS table	This program must be run before you can run the Refresh of as_sales_credits_denorm (in complete mode), Initial Build of Opportunity Bins, Refresh Multi-Currency Conversion Rates, and the Build Materialized View for Forecast Main Page. This sequence of programs must be rerun if the GL period definitions are changed. If this program is run, then the following programs must also be run: Refresh of AS_SALES_CREDITS_DENORM (Complete), Refresh of Forecast Summary Tables, Initial build of Opportunity Bins Data
	Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)	Will refresh the multi-currency conversion rates in setting multiple currency.
Yes	Refresh of as_sales_credits_denorm	Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters: Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh). Incremental Refresh = Run in this mode for an incremental refresh
	Refresh of Customer Classification Denormalization	Complete data refresh to populate the denorm table as_hz_class_code_denorm. Parameters: Debug or SQL Trace
	Refresh of Forecast Summary Tables	This program is used to refresh the materialized view used for forecasting. This program should be run periodically.
No	Refresh of Leads Bin Data	This program is used to run an incremental refresh of the materialized view used for the Leads bins and reports. This program should be scheduled to run periodically.

Mandatory	Concurrent Program Name	Description
No	Refresh of Opportunity Status Aging Summary Table	Refreshes the summary data for opportunities that have been created or updated since the last refresh time. This concurrent program was created to extract status log data from AS_LEADS_LOG, calculate the summary data from the log data, and refresh AS_LOG_STATUS_SUMMARY table with the summary data.
No	Refresh of Opportunity Bins Data	This program is used to run an incremental refresh of the materialized view used for the opportunity bins and reports. This program should be scheduled to run periodically. **Note:** Users will not see opportunities in bins created after the last refresh of "refresh sales credit".
	Setup Checking for Oracle Sales application	This program validates Sales Setups and produces an error log that the system administrator can use to diagnose invalid setups. Parameters: Upgrade - Yes/No

C

Lookups

This appendix provides a table of the lookups used. 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.

C.1 Table of Lookups

The following table lists lookups, their values or defaults, the areas they affect, and the access level.

App.	Lookup Type	Values	Affects	Level
	ASF_CHART_SERIES_COUNT		Number of series to show in a chart.	U
	ASF_CHART_VALUE_TYPES		Value type for Y axis in charts (Count/Amount).	U
	ASF_MODULE_FUNCTION_ATTR		Lookup for default login page features.	U
	ASF_LIST_QUERY_FILTERS	Detail (Title, Gender, Sales Group) Relationship (Person to Organization, Person to Person, Department Type, Job Title Type, Role) Address (Country) Customer Classification (Class Category)	Contact list filters	
	BUDGET_STATUS	APPROVED (Approved) NOT_APPROVED (Not approved) PENDING (Pending)	Leads budget status	
	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Leads close reason	

App.	Lookup Type	Values	Affects	Level
	DECISION_TIMEFRAME	1-3 MONTHS 3-6 MONTHS 6-12 MONTHS MORE THAN 1 YEAR WITHIN 1 MONTH WITHIN 1 WEEK	Leads time frame	
	LEAD_CONTACT_ROLE	DECISION_MAKER (Decision maker) END_USER (End user)	Leads contact role	
	LINK_TYPE		Lookup for tools administration page.	

App.	Lookup Type	Values	Affects	Level
	OPP_LOG_TIMEFRAME	YEAR Logs will be created. But no more than on Update log record will exist within the same year time frame. QUARTER Logs will be created. But no more than on Update log record will exist within the same quarter time frame. MONTH Logs will be created. But no more than on Update log record will exist within the same month time frame. WEEKLogs will be created. But no more than on Update log record will exist within the same week time frame. DAY Logs will be created. But no more than on Update log record will exist within the same day time frame. HOUR Logs will be created. But no more than on Update log record will exist within the same hour time frame. MINUTE Logs will be created. But no more than on Update log record will exist within the same minute time frame. NONE Logs will be created without time frame restriction.	Opportunity	
	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	MEMBER_OF (Member)		
	(continued)	MOTHER_OF (Mother)		
		OWNED_BY (Owned)		
		PARENT_OF (Parent)		
		PARTNER_OF (Partner)		
		PAYFROM_OF (Alternate party to pay for a buyer)		
		PAYTO_OF (Alternate payee name for the seller)		
		PUBLISHER (Publisher)		
		REFERENCE_FOR (Reference)		
		_OF (Relative)		
		REPAIR_DEPOT_PROVIDER_FOR (Repair depot provider)		
		REPORTS_TO (Reports to)		
		SELLER_FOR (Seller)		
		SELLER_TO (Seller to)		
		SHIPTO_OF (Alternate shipping party for the buyer)		
		SIBLING_OF (Sibling)		
		SISTER_OF (Sister)		
		SON_OF (Son)		
		SPOUSE_OF (Spouse)		
		STOCK_HOLDER_OF (Stockholder)		
		STUDENT_OF (Student)		
		SUBSIDIARY_OF (Subsidiary)		
		THIRD_PARTY_OF (Third party)		
		UNCLE_OF (Uncle)		
		VAD_OF (VAD of)		
		VAR_OF (VAR of)		
		VENDOR_OF (Vendor)		

App.	Lookup Type	Values	Affects	Level
	RANK_ID	1 (Cold lead) 2 (Low lead) 3 (Medium lead) 4 (Hot lead)	Lead rank	
	REJECT_REASON _CODE	ASSIGN_ERROR (Assign error) DUPLICATE (Duplicate) VACATION (Vacation)	Leads decline reason	
	SALES_CHANNEL	DIRECT (Direct) INDIRECT (Indirect)	Sales Channel	S
	STATUS_CODE	NEW (new) UNQUALIFIED (unqualified) QUALIFIED (qualified) ACCEPTED (accepted) LOSS (loss) DEAD_LEAD (dead lead) DECLINED (declined) CONVERTED_TO_OPPORTUNITY (lead converted to opportunity)	Lead status	
	VEHICLE_RESPONSE_CODE	EMAIL FAX LETTER PHONE USER VOICE_MESSAGES WEB	Lead response channel	
	RELATIONSHIP_TYPE	ALL (seeded value)	Accounts	
	TAX_CODE		Accounts	
	PAYMENT_TERM		Accounts	
AMS	AMS_EVENT_PAYMENT_ STATUS		Events	
AR	ACCOUNT_STATUS		Accounts	

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 (continued)	CONSULTANT_FOR (Consultant)		
		CONTACT_OF (Contact)		
		CONTAINS_MEMBER (Contains member)		
		COUSIN_OF (Cousin)		
		CUSTOMER_OF (Customer)		
		DAUGHTER_OF (Daughter)		
		DEPENDENT_OF (Dependent)		
		DIVISION_OF		
		DOMESTIC_PARTNER_OF (Domestic Partner)		
		DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of)		
		DOMESTIC_ULTIMATE_OF (Domestic Ultimate of)		
		EMPLOYEE_OF (Employee)		
		EMPLOYER_OF (Employer)		
		FATHER_OF (Father of)		
		FIELD_SERVICE_PROVIDER_FOR (Field Service provider)		
		GENERAL_EMPLOYEE_OF (General Employee)		
		GLOBAL_SUBSIDIARY_OF (Global subsidiary of)		
		GLOBAL_ULTIMATE_OF (Global Ultimate of)		
		GUARANTOR_FOR (Guarantor)		
		GUARDIAN_OF (Guardian)		
		HEADQUARTERS_OF (Headquarters of)		
		KEY_DECISION_MAKER_FOR (Key decision maker)		
		LEGAL_COUNSEL_FOR (Legal counsel for)		
		MANAGER_OF (Manager_of)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE	ACK (Acknowledgments)	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 (Home) MOBILE (Mobile) OFFICE (Office) PAGER (Pager)	Persons, organizations, opportunities	E
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	RESPONSIBILITY	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Recievable Supervisor) CFO (Chief Financial Officer) COLCT (Collections) COLCTSUP (Collections Supervisor) CONTRLR (Controller) GLC (General Ledger Clerk) GLS (General Ledger Supervisor) SOC (Sales Operation Clerk) SOS (Sales Operations Supervisor) TRSUR (Treasurer)	Persons, organizations, Universal Work Queue	E
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	ACCESS_PRIVILEGE	F (Full unrestricted access) P (Prospecting Access) T. (Sales Team Access)	Access privilege for employee	S

App.	Lookup Type	Values	Affects	Level
AS	ASTATA_RUN_MODE	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)	Run mode for Territory Assignment concurrent program	S
AS	AUTO_ASSIGNMENT_TYPE	Both None PRM TAP	Automatic assignment type	S
AS	BUDGET_AMOUNT		Leads, lookup	
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Opportunity close reason	E
AS	CONTACT_RANK_ON OPPORTUNITY	DECISION_MAKER END_USER	Opportunity contact rank	U
AS	DECISION_TIMEFRAME		Leads	
AS	FLAG	N (No) Y (Yes)	Flag	S
AS	INTEREST USE	COMPANY_CLASSIFICATION (Customer Classification) CONTACT_INTEREST (Contact Interest) LEAD_CLASSIFICATION (Lead or Opportunity Classification)	Interest use	S
AS	INTEREST_USE		Opportunities	
AS	ISSUE		eBusiness Center, leads, opportunities	

App.	Lookup Type	Values	Affects	Level
AS	LEAD_CONTACT_ROLE		Leads	
AS	LEAD_SOURCE		Leads, opportunities	
AS	MC_DATE_MAPPING_TYPE	E (End date of a period) S (Start date of a period)	Date mapping type	U
AS	METHODOLOGY_TYPE	OOP (Object Oriented)	Opportunity methodology type	E
AS	OPP_ACCESS_PRIVILEGE	F (Full Unrestricted Access) O (Full Access by Operating Unit) P (Prospecting Access) T (Sales Team Access)	Opportunity access privilege	S
AS	OPP_PROBABILITY_LINK	Error (New value is not acceptable) Warning (Warn user about error)	Opportunity probability links	S
AS	PLAN_ELEMENT_MAPPING	PCODE (Map quota to primary interest code) SCODE (Map quota to secondary interest code TYPE (Map quota to interest type)	Sales categories mapping with sales quotas (Oracle Incentive Compensation)	S
AS	PRM_LEAD_TYPE		Opportunities	
AS	REJECT_REASON_CODE	ASSIGN_ERROR DUPLICATE VACATION	Leads	
AS	ROLE_TYPE		Persons, Organizations, accounts, lookup	
AS	ROLE_TYPE	AM (Account Manager) PS (Product Specialist)	Role type	U
AS	SALESFORCE_RELATIONSHIP		Opportunities	
AS	SCD_REFRESH_MODE	1 (Complete refresh) 2 (Incremental refresh)	Sales Credit Denorm refresh mode	U

App.	Lookup Type	Values	Affects	Level
AS	SCD_RUN_MODE	1 (Complete) 2 (Update)	Sales Credit Denorm run mode	E
AS	UPDATE_ACCESS		eBusiness Center	
AS	UPDATE_ACCESS	I (Inherit data) R (View data) U (Update subordinate's data)	Update access	S
AS	VEHICLE_RESPONSE_CODE		Leads	
AS	VEHICLE_RESPONSE_CODE		Opportunities	
AS	VEHICLE_RESPONSE_CODE		Lookup	
ASF	ASF_CHART_COLOR_PALETTE	#99cccc #336699 #cccc33 #ccff99 #339966 #9999ff #996633 #99cc33 #0066cc #ffcc00 #009999 #999999 #cccc66 #666699 #ccccff	Charts	S
ASO	ASO_ITEM_TYPE		Accounts	
ASO	ASO_QUOTE_RELATED_ OBJECTS		Quotes/Orders	

App.	Lookup Type	Values	Affects	Level
AST	AST_SEARCH_VIEW_BY_LIST	ACCOUNT CAMPAIGN COLLATERAL CUSTOMERKEY DISPUTE EVENT LEAD OPPORTUNITY PAYMENT PROMISETOPAY QUOTE TRANSACTION	Universal Search	S
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

Implementing Oracle Sales Offline Edition

D.1 Implementing Sales Offline

This section is meant for the DBA or the technical administrator.

D.1.1 System Administration Tasks

To implement Sales Offline:

1. Ensure that the customer has fully implemented Oracle Sales Online.
2. Ensure that the customer has licensed Oracle Mobile Field Sales Laptop (ASL) and applied Sales Offline patches using ADpatch.
3. After applying the patches, clear the Jserv cache.
4. Restart the application server.

D.1.2 Configuring Tab Display

Use the ASL_XLS_MAIN_MENU file to control the display of tabs in Sales Offline. This step is only necessary if you want to customize the tab display in Sales Offline.

1. Using System Administrator responsibility, launch the Menus form and navigate to the ASL_XLS_MAIN_MENU menu.
2. Edit the tab display as desired.
   - To change the label of a tab, edit the Prompt field of the corresponding menu entry.
   - To change the order of tabs, recreate the menu entries with the correct sequence (determined by the Seq field).

- To remove a tab, clear out the Prompt field of the corresponding menu entry.
- To customize the subtabs, refer to the Submenu name under the parent menu and find that menu. Then modify as described for tabs. For example, to customize the subtabs under the Home tab, find the menu ASL_XLS_HOME and edit its menu entries.

Note: ASL_XLS_MAIN_MENU and its submenus are not associated with any existing responsibility. As a result, changes to these menus affect all Sales Offline users. Menu and function exclusion defined at Responsibility level are not considered when rendering tabs in Sales Offline. An exception is the ASL_EXCEL_MENU menu, which is used for the Mobile tab (accessible from Oracle Sales Online).

D.1.3 Setting System Profile Options for Sales Offline

This section describes the system profile options used by Sales Offline. The procedure for setting 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.*

The profiles described are:

- General System Profiles
- User Preference Profiles
- Sync Time Profile
- Field Sales/Laptop Profiles
- Downloaded Online Application Profiles
- Quote Profiles
- Forecasting Profiles

D.1.3.1 General System Profiles

These are the system profile options you can set:

- ASL: Campaign Code Download Threshold - Determines the number of campaign (source/offer) codes to download

- ASL: Excel Debug - if set to Yes, debug option is turned on and the application will create logs on the server

D.1.3.2 User Preference Profiles

These profiles are used for storing user's preference specified in Sync Preferences UI. No setup is required. Do not attempt to manually change these values.

- ASL: Excel Budget Status
- ASL: Excel Customer Category
- ASL: Excel End Period
- ASL: Excel Forecast Category
- ASL: Excel Forecast Credit
- ASL: Excel From Win Probability
- ASL: Excel Lead Channel
- ASL: Excel Lead Max
- ASL: Excel Lead Rank
- ASL: Excel Lead Status
- ASL: Excel Opportunity Status
- ASL: Excel Organization Country
- ASL: Excel Organization State
- ASL: Excel Period Type
- ASL: Excel Sales Channel
- ASL: Excel Sales Stage ID
- ASL: Excel Start Period
- ASL: Excel Timeframe
- ASL: Excel To Win Probability

D.1.3.3 Sync Time Profile

This system profile option is used for storing user's last sync time. Please do not change.

- ASL_EXCEL_LAST_SYNC_TIME

D.1.3.4 Field Sales/Laptop Profiles

These system profile options are used in Field Sales/Laptop. They are obsolete, and not required for use in Sales Offline. They are listed here for your information:

- ASL: ACCESS_CALLOUTS
- ASL: Conflict Flag
- ASL: Default MTL Organization ID for Field Sales/Laptop
- ASL: Enable Attachment
- ASL: Enable Configurator
- ASL: Enable Encyclopedia
- ASL: Enable Selective Download
- ASL_WRAPPER_DEBUG

D.1.3.5 Downloaded Online Application Profiles

Sales Offline will download and use these profiles if they are established in the online applications. Refer to the appropriate online application implementation guide for further details on these profiles:

- ASO: Default Currency Code
- ASO: Default Order Type
- ASO: Default Ordered Quantity in OC UI
- ASO: Default Quote Status
- ASO: Default Sales Channel
- ASO: Quote Duration
- ASO: Validate Salesrep
- BNE Servlet Path
- IES: Organization Id
- OS: Address Required for Opportunity
- OS: Address Required for Organization
- OS: Address Required for Person
- OS: Address Required for Sales Lead

- OS: Decision time frame required
- OS: Default Budget Status for Leads
- OS: Default Channel for Leads
- OS: Default Close Date Days
- OS: Default Decision Timeframe for Leads
- OS: Default Lead Contact Role
- OS: Default Opportunity Sales Stage
- OS: Default Opportunity Status
- OS: Default Opportunity Win Probability
- OS: Default Sales Channel
- OS: Forecast Sales Credit Type
- OS: Opportunity Probability Link
- OS: Sales Methodology
- OS: Source Code Mandatory for Leads
- OS: Source Code Required for Opportunity
- OSO: Default Country
- OSO: Default Forecast Currency
- OSO: Forecast Max Generate Months

D.1.3.6 Quote Profiles

These Quote profiles are supported:

- JTF_PROFILE_DEFAULT_CURRENCY
- ASO: Enable Approvals
- ASO: Allow Skip Approvers
- ASO: Default Currency Code
- ASO: Default Ordered Qty in OC UI
- ASO: Default Quote Status
- ASO: Default Sales Channel

- ASO: Enable Line Flexfields in HTML UI
- ASO: Default Order Type
- ASO: Quote Duration
- ASO: Enable Security Check
- ASO: Enable Submit Button
- ASO: Status Override
- ASO: Validate Salesrep

D.1.3.7 Forecasting Profiles

If you are implementing Forecasting for the 11.5.8 or 11.5.9 release, use these profiles:

- OSO: Allow Opportunity Forecast By Product Category = No
- OSO: Enable Opportunity Worksheet Threshold = No
- OSO: Opportunity Worksheet Threshold Amount = Empty

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