

# Oracle® Sales Online

User Guide

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Oracle Sales Online User Guide, Release 11i

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# Contents

<b>Send Us Your Comments .....</b>	<b>xv</b>
<b>Preface.....</b>	<b>xvii</b>
Intended Audience .....	xvii
How To Use This Guide .....	xviii
Documentation Accessibility .....	xix
Other Information Sources .....	xix
Do Not Use Database Tools to Modify Oracle Applications Data .....	xxvi
About Oracle .....	xxvi
<b>Part I Introduction and Overview</b>	
<b>1 Introduction to Oracle Sales Online</b>	
1.1 Overview .....	1-1
1.2 Key Features.....	1-6
1.3 Integrations .....	1-10
1.3.1 ERP Applications .....	1-11
1.3.2 CRM Applications.....	1-12
1.4 Process Flow for Lead to Opportunity.....	1-13
1.5 Process Flow for Opportunity to Quote.....	1-15
1.6 Process Flow for Opportunity to Forecast.....	1-16
1.7 Process Flow for Sales Forecast to Management Rollup .....	1-17
1.8 What's New.....	1-18
1.9 What's Obsolete.....	1-20

## 2 Overview of Using Oracle Sales Online

2.1	Accessing Administration .....	2-1
2.2	Summary of Tasks .....	2-2

## Part II User Procedures

### 3 Getting Started

3.1	Overview of Getting Started .....	3-1
3.2	Getting Started .....	3-2
3.2.1	Using Quick Find or Advanced Search.....	3-2
3.2.2	Quick Find .....	3-2
3.2.3	Advanced Search.....	3-4
3.2.4	Your Home Page.....	3-6
3.3	Managing Account Settings .....	3-7
3.3.1	Changing Your Password .....	3-8
3.3.2	Updating Personal Information .....	3-9
3.4	Personalization.....	3-10
3.4.1	Navigation Preferences.....	3-10
3.4.2	Display Preferences.....	3-10
3.4.3	Quick Menu.....	3-11
3.5	Setting Profiles .....	3-12
3.5.1	Setting General Profiles .....	3-13
3.5.2	Setting Home Page Profiles.....	3-15
3.5.3	Setting Lead Profiles .....	3-17
3.5.4	Setting Opportunity Profiles.....	3-19
3.5.5	Setting Forecast Profiles .....	3-21
3.5.6	Setting Customer Profiles.....	3-24
3.5.7	Setting Compensation Profiles .....	3-26
3.5.8	Setting Contact List Profiles.....	3-27
3.6	Overview of Managing Opportunities .....	3-28
3.6.1	Opportunity Overview .....	3-28
3.7	Overview of Managing Forecasting.....	3-30
3.7.1	Forecasting Overview .....	3-30
3.8	Overview of Managing Customers.....	3-32

3.8.1	Managing Organizations Overview .....	3-32
3.8.2	Managing Persons Overview .....	3-32
3.8.3	Managing Contacts Overview.....	3-32
3.8.4	Managing Contact Lists Overview .....	3-33

## 4 Your Home Page

4.1	Overview of the Home Page.....	4-1
4.1.1	Running Concurrent Programs for Materialized Views .....	4-3
4.1.2	Setting Up Bins, Charts, and Reports.....	4-4
4.1.3	Available Bins and Charts.....	4-4
4.1.4	Editing a Bin, Chart, Report, or Graph .....	4-8
4.1.5	Editing "My Favorites" Bin .....	4-10
4.1.6	Internal Tools .....	4-12
4.1.7	Using Territory Lookup .....	4-12
4.1.8	Using Event Lookup .....	4-13
4.1.9	External Tools .....	4-13

## 5 Calendar Tab

5.1	Overview of the Calendar Tab .....	5-1
5.1.1	About Calendar Profiles.....	5-1
5.1.2	Using Calendar Views.....	5-2

## 6 Lead Tab

6.1	Overview of the Lead Tab.....	6-2
6.1.1	Personalizing Leads .....	6-3
6.1.2	Searching for a Lead .....	6-5
6.1.3	Creating a Lead.....	6-5
6.1.4	Maintaining a Lead .....	6-8
6.1.5	Assigning a Lead Owner.....	6-10
6.1.6	Qualifying a Lead.....	6-11
6.1.7	Rating a Lead .....	6-12
6.1.8	Selecting a Sales Channel.....	6-13
6.1.9	Converting a Lead to an Opportunity .....	6-15
6.1.10	Linking a Lead to an Opportunity.....	6-16

6.1.11	Appending Lead Lines to an Opportunity .....	6-17
6.1.12	Declining a Lead .....	6-17
6.1.13	Using Mass Update .....	6-18
6.1.14	Using Mass Evaluate .....	6-19
6.1.15	Attaching a Contact to a Lead .....	6-20
6.1.16	Creating a Note .....	6-21
6.1.17	Viewing All Notes .....	6-21
6.1.18	Viewing Note History .....	6-22
6.1.19	Creating a Task .....	6-22
6.1.20	Creating an Attachment .....	6-23
6.1.21	Sales Teams .....	6-23
6.1.22	Lead Reports .....	6-26

## 7 Opportunity Tab

7.1	Overview of the Opportunity Tab .....	7-2
7.2	Personalizing Opportunity Summary .....	7-4
7.3	Creating an Opportunity .....	7-6
7.3.1	Quick Create .....	7-10
7.4	Creating Rolling Opportunities .....	7-11
7.5	Maintaining Opportunity Detail .....	7-12
7.6	Personalizing a Table .....	7-17
7.7	Viewing Opportunity Line Subtotals .....	7-18
7.8	Searching for an Opportunity .....	7-18
7.9	Copying an Opportunity .....	7-19
7.10	Creating a Quote from an Opportunity .....	7-21
7.11	Creating a New Contact .....	7-22
7.12	Sales Teams .....	7-23
7.12.1	Adding a Sales Team Member .....	7-24
7.12.2	Adding a Partner to a Sales Team .....	7-25
7.12.3	Adding a Resource Team to a Sales Team .....	7-25
7.12.4	Removing a Sales Team Member .....	7-26
7.13	Adding a Classification .....	7-27
7.14	Linking an Opportunity to an Existing Lead .....	7-28
7.15	Adding a Key Competitor to an Existing Opportunity .....	7-29
7.16	Adding Decision Factors .....	7-30

7.17	Adding a Key Competitor While Creating an Opportunity .....	7-30
7.18	Adding a Competitor at the Purchase Item Level .....	7-31
7.19	Tracking Win/Loss Information .....	7-32
7.20	Adding Multiple Purchase Items with the Same Product Category .....	7-33
7.21	Viewing Opportunity History .....	7-34
7.22	Closing an Opportunity .....	7-34
7.23	Sales Credits .....	7-36
7.23.1	Maintaining Sales Credits .....	7-36
7.23.2	Adding a Salesperson to Receive Sales Credits .....	7-37
7.23.3	Adding a Partner to Receive Sales Credits .....	7-37
7.24	Adding an Existing Contact to an Opportunity .....	7-38
7.25	Notes .....	7-39
7.25.1	Creating Notes .....	7-39
7.25.2	Viewing Notes .....	7-39
7.26	Tasks .....	7-41
7.26.1	Creating a Task .....	7-41
7.26.2	Adding an Attachment to a Task .....	7-42
7.26.3	Maintaining a Task .....	7-42
7.27	Attachments .....	7-43
7.27.1	Adding an Attachment .....	7-43
7.27.2	Viewing an Existing Attachment .....	7-44
7.28	Opportunity Reports .....	7-45
7.28.1	Viewing Opportunity Summary Report .....	7-45
7.28.2	Viewing Opportunity Summary Report by Group .....	7-46
7.28.3	Viewing Opportunity Detail Report .....	7-47
7.28.4	Viewing Opportunity Access Report .....	7-48
7.28.5	Viewing Opportunity Progression Dashboard .....	7-49
7.28.6	Viewing Opportunity Classification Report .....	7-50
7.28.7	Viewing Opportunity Aging Report .....	7-50
7.28.8	Viewing Opportunity Aging by Status Report .....	7-51
7.28.9	Viewing Opportunity by Product Report .....	7-52
7.28.10	Viewing My Reports and Charts .....	7-53
7.28.11	Viewing Opportunity Chart by Close Date .....	7-53
7.28.12	Viewing Opportunity Chart by Status .....	7-54
7.28.13	Viewing Opportunity Chart by Win Probability .....	7-54

## 8 Quote Tab

8.1	Overview of the Quote Tab.....	8-1
8.2	Creating Quotes .....	8-3

## 9 Forecast Tab

9.1	Overview of the Forecast Tab .....	9-2
9.2	Creating and Submitting Forecasts.....	9-5
9.3	Automatically Submitting Worksheets .....	9-6
9.4	Viewing Forecast History .....	9-7
9.5	Adding an Attachment .....	9-8
9.6	Adding a Note.....	9-8
9.7	Linking to Compensation.....	9-9
9.8	Opportunity Worksheet .....	9-10
9.8.1	Creating Opportunity Level Forecasts Using Opportunity Worksheets .....	9-10
9.9	Personalizing Opportunity Worksheet Table.....	9-12
9.10	Forecast Threshold Overview.....	9-14
9.10.1	Defining Your Forecast Threshold.....	9-15
9.10.2	Viewing Opportunities Included in the Forecast .....	9-17
9.10.3	Viewing Threshold History .....	9-17
9.10.4	Viewing Subordinate's Threshold Details.....	9-18
9.11	Product Category Worksheet.....	9-19
9.11.1	Creating Product Level Forecasts Using Product Category Worksheets.....	9-19
9.12	Viewing Product Category History .....	9-20
9.13	Viewing Opportunity History .....	9-21
9.14	Quick Forecast.....	9-22
9.15	Forecast Reports.....	9-24
9.15.1	Viewing Forecast History Report.....	9-24
9.15.2	Viewing Forecast Comparison Report .....	9-25
9.15.3	Viewing Forecast Summary Report by Product Category .....	9-27
9.15.4	Viewing Forecast Accuracy Report .....	9-29
9.15.5	Viewing Forecast to Pipeline Summary Report.....	9-30
9.15.6	Viewing Forecast Summary Report.....	9-32
9.15.7	Viewing Forecast Progression Report .....	9-33
9.15.8	Creating a Report .....	9-35
9.15.9	Viewing Forecast History (Self) Chart .....	9-35

9.15.10	Viewing Forecast History (Subordinates) Chart .....	9-36
---------	---	------

## 10 Customer Tab

10.1	Overview of the Customer Tab .....	10-1
10.2	Organization Subtab .....	10-4
10.2.1	Personalizing Organization Summary .....	10-5
10.2.2	Creating a New Organization .....	10-6
10.2.3	Maintaining Organization Details .....	10-13
10.2.4	Creating a New Address for the Organization.....	10-17
10.2.5	Searching for an Organization .....	10-18
10.2.6	Adding Classifications .....	10-20
10.2.7	Creating and Maintaining Relationships.....	10-21
10.2.8	Maintaining Lead Details.....	10-24
10.2.9	Creating Opportunities .....	10-25
10.2.10	Maintaining Opportunity Details .....	10-25
10.2.11	Maintaining Quote Details.....	10-26
10.2.12	Notes .....	10-27
10.2.13	Sales Teams .....	10-29
10.2.14	Tasks.....	10-34
10.2.15	Interactions.....	10-36
10.2.16	Attachments .....	10-37
10.2.17	Accounts .....	10-38
10.2.18	360 Degree View.....	10-44
10.3	Person Subtab.....	10-46
10.3.1	Person Summary .....	10-46
10.3.2	Personalizing Person Summary .....	10-47
10.3.3	Creating a Person .....	10-47
10.3.4	Maintaining Person Details .....	10-54
10.3.5	Adding Classifications .....	10-60
10.3.6	Searching for a Person.....	10-60
10.3.7	Sending Collateral.....	10-61
10.3.8	Creating and Maintaining Relationships.....	10-61
10.3.9	Leads .....	10-66
10.3.10	Creating Opportunities .....	10-66
10.3.11	Maintaining Quote Details.....	10-67

10.3.12	Notes .....	10-68
10.3.13	Sales Teams .....	10-70
10.3.14	Tasks.....	10-74
10.3.15	Interactions.....	10-76
10.3.16	Attachments .....	10-77
10.3.17	Accounts .....	10-78
10.3.18	360 Degree View.....	10-84
10.4	Contacts Subtab .....	10-86
10.4.1	Personalize Contact Summary .....	10-87
10.4.2	Creating a Contact.....	10-87
10.4.3	Searching for a Contact.....	10-90
10.4.4	Maintaining Contact Details.....	10-90
10.4.5	Adding Classifications.....	10-92
10.4.6	Managing Contact Notes.....	10-92
10.4.7	Creating a Contact Task .....	10-93
10.4.8	Managing Contact Attachments .....	10-94
10.4.9	Managing Contact Interactions .....	10-94
10.4.10	Sending Collateral from the Contact Summary Table.....	10-95
10.5	Contact List Subtab .....	10-96
10.5.1	Creating a Contact List Using Filters.....	10-97
10.5.2	Creating a Contact List by Manually Adding Contacts.....	10-98
10.5.3	Updating Contact, Customer, and Relationship Details .....	10-99
10.5.4	Saving a Contact List .....	10-99
10.5.5	Downloading a Contact List .....	10-99
10.5.6	Personalizing the Summary Table Display .....	10-100
10.5.7	Adding Additional Filters to a Contact List.....	10-100
10.5.8	Viewing List Filters .....	10-101
10.5.9	Manually Add a Contact to a List.....	10-101
10.5.10	Removing a Contact From a List.....	10-102
10.5.11	Removing a List.....	10-102
10.5.12	Call Sheet Overview.....	10-102
10.5.13	Generating a Call Sheet .....	10-103
10.5.14	Viewing Call Sheet Details.....	10-103
10.5.15	Sorting a Call Sheet .....	10-104
10.5.16	Selecting Multiple Contacts .....	10-105

10.5.17	Adding a Task.....	10-105
10.5.18	Sending Collateral.....	10-106
10.5.19	Viewing Calendar Tasks .....	10-107
10.5.20	Updating Contact, Customer, and Relationship Details .....	10-107
10.6	Customer Reports.....	10-108
10.6.1	Viewing the Customer Classification Report.....	10-108
10.6.2	Viewing the Task Classification Report.....	10-109

## 11 Partner Tab

11.1	Overview of the Partner Tab .....	11-1
11.1.1	Partner Overview .....	11-1
11.1.2	Creating a Partner .....	11-2
11.1.3	Creating a Person/Contact .....	11-3

## 12 Compensation Tab

12.1	Overview of the Compensation Tab.....	12-1
------	---------------------------------------	------

## 13 Fulfillment Tab

13.1	Overview of the Fulfillment Tab.....	13-1
13.1.1	Sending Collateral.....	13-1

## 14 Administration Tab

14.1	Overview of the Administration Tab .....	14-1
14.2	General Administration.....	14-2
14.2.1	Globalization.....	14-2
14.2.2	Calendar Type .....	14-2
14.2.3	Accounting Calendar .....	14-3
14.2.4	Type Mapping .....	14-4
14.2.5	Create a New Type Mapping .....	14-4
14.2.6	Period Rate .....	14-4
14.2.7	GL Daily Rate.....	14-5
14.2.8	Transaction Calendar.....	14-7
14.3	Sales Administration.....	14-7
14.3.1	Menu Administration .....	14-8

14.3.2	Resequence Side Panel Navigation Menus.....	14-9
14.3.3	Change the Menu Name .....	14-9
14.3.4	Create a Parent Menu .....	14-9
14.3.5	Create Your Own Menu .....	14-10
14.3.6	Home Page .....	14-10
14.3.7	Setting Up Home Page Bins Accessibility.....	14-10
14.3.8	External Tools .....	14-11
14.3.9	Home Page Message .....	14-13
14.3.10	Sales Category.....	14-13
14.3.11	Interest Types.....	14-14
14.3.12	Interest Codes .....	14-15
14.3.13	Interest Status.....	14-16
14.3.14	Plan Element Mapping.....	14-17
14.3.15	Call Center.....	14-18
14.3.16	Opportunity .....	14-18
14.3.17	Win Probability.....	14-19
14.3.18	Sales Stage .....	14-20
14.3.19	Status Code.....	14-21
14.3.20	Sales Methodology .....	14-22
14.3.21	Forecast .....	14-24
14.3.22	Forecast Category.....	14-24
14.3.23	Forecast Category Mapping.....	14-25
14.3.24	Budget/Revenue Entry .....	14-26
14.3.25	Accesses .....	14-28
14.3.26	Territory .....	14-28
14.3.27	Resource.....	14-29
14.3.28	Customer .....	14-29
14.3.29	Lead .....	14-29
14.3.30	Opportunity .....	14-30
14.4	Leads Administration .....	14-30
14.5	Resource Administration.....	14-30
14.6	Adding a Custom Report to Report Listings.....	14-31
14.7	Excluding Tabs and Functions.....	14-32
14.8	Turning "On" or "Off" Debug Information .....	14-34
14.9	Updating Job Title Type and Department Type LOV.....	14-35

14.10	Removing Items from the Inventory Items .....	14-36
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## **Part III   Appendixes**

### **A   Oracle Sales Online Frequently Asked Questions**

A.1	Frequently Asked Questions .....	A-2
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### **B   Oracle Sales Online Seed Data**

B.1	Lookups .....	B-1
B.1.1	Table of Lookups.....	B-2
B.2	System Profile Options .....	B-20
B.2.1	Setting System Profile Options.....	B-20
B.2.2	Table of System Profile Options.....	B-21

## **Glossary**

## **Index**



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

**Part No. B10564-02**

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

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# Preface

## Intended Audience

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

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

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

If you have never used Oracle Sales Online, Oracle suggests you attend one or more of the Oracle Sales Online training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

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

This guide is aimed at the following users:

- Administrators
- Sales Representatives
- Sales Managers
- Sales Executives

# How To Use This Guide

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

## Introduction to Oracle Sales Online

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

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

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

## 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/>.

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## Other Information Sources

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

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

### **Online Documentation**

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

### **Related Documentation**

Oracle Sales Online shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Sales Online.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

### **Documents Related to All Products**

#### **Oracle Applications User's Guide**

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

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

### **Documents Related to This Product**

#### **Oracle Inventory User's Guide**

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

### **Oracle Marketing User Guide**

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

### **Oracle Marketing Encyclopedia User Guide**

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

### **Oracle Incentive Compensation User Guide**

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

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

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

### **Oracle Partners Online User Guide**

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

### **Oracle Partners Online Implementation Guide**

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

### **Oracle CRM Application Foundation User Guide**

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

### **Oracle Quoting Implementation Guide**

This manual describes how to implement Oracle Quoting.

### **Oracle HTML Quoting User Guide**

This manual contains information on using Oracle HTML Quoting.

### **Oracle Sales Online Technical Reference Manual**

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

## **Installation and System Administration**

### **Oracle Applications Concepts**

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

### **Installing Oracle Applications**

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

### **Oracle Applications Supplemental CRM Installation Steps**

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

### **Upgrading Oracle Applications**

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

### **Maintaining Oracle Applications**

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

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

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

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

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

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

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

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

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

## **Other Implementation Documentation**

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

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

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

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

### **Oracle Workflow Guide**

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle Sales Online implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

### **Oracle eTechnical Reference Manuals**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

### **Oracle Manufacturing APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

### **Oracle Order Management Suite APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

### **Oracle Applications Message Reference Manual**

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

### **Oracle CRM Application Foundation Implementation Guide**

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

## **Implementing Oracle HRMS**

This document provides the information necessary to implement Oracle HRMS.

## **Training and Support**

### **Training**

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

### **Support**

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sales Online working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

### **OracleMetaLink**

*OracleMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (<http://metalink.oracle.com>).

**Alerts:** You should check *OracleMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

**Self-Service Toolkit:** You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

## Do Not Use Database Tools to Modify Oracle Applications Data

***Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.***

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.



# Part I

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## Introduction and Overview

This part contains the following chapters:

- [Chapter 1, "Introduction to Oracle Sales Online"](#)
- [Chapter 2, "Overview of Using Oracle Sales Online"](#)



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# Introduction to Oracle Sales Online

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

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Key Features"](#)
- [Section 1.3, "Integrations"](#)
- [Section 1.4, "Process Flow for Lead to Opportunity"](#)
- [Section 1.5, "Process Flow for Opportunity to Quote"](#)
- [Section 1.6, "Process Flow for Opportunity to Forecast"](#)
- [Section 1.7, "Process Flow for Sales Forecast to Management Rollup"](#)
- [Section 1.8, "What's New"](#)
- [Section 1.9, "What's Obsolete"](#)

## 1.1 Overview

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

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

- Order placement
- Sales methodologies

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

### **Traditional Sales vs. e-Business Sales Model**

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

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

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

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

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

## **Understanding Trading Community Architecture**

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

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

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

### **TCA Parties**

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

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

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

## **TCA Party Types**

### **Person**

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

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

### **Organization**

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

### **Party Relationship**

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

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

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

### **Business Relationships**

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

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

### **Personal Relationships**

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

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

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

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

### **Person-Organization Relationships**

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

Example: John employee of Oracle (person-organization)

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

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

### **Organization-Organization Relationships**

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

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

### **Understanding Sales Methodology**

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

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

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

The methodology link displays the list of sales stages for the selected methodology. Click the sales stage link, within the methodology page, the list of tasks for that sales stage is displayed.

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

### **Elements of a Sales Methodology**

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

## **1.2 Key Features**

Oracle Sales Online includes the following features:

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

- [Forecast Management](#)
- [Quote and Order Management](#)

### **Customer and Contact Management**

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

Also includes:

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

### **Opportunity Management**

Account managers, sales managers, and territory managers use Oracle Sales Online to analyze their pipelines. Real time reports summarizing pipelines are available through the application.

Also includes:

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

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

### **Lead Management**

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

Also includes:

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

### **Personal Productivity**

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

### **Personalization**

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

Also includes:

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

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

### **Self Service Administration**

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

Also includes:

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

### **Information Out (Analytics)**

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

### **Forecast Management**

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

### **Quote and Order Management**

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

## **1.3 Integrations**

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

### **Incentive Compensation: Performance Measures in Oracle Sales Online**

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

### **Sales Force Planning: Quota Planning and Distribution**

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

### **Partner Relationship Management/Partners Online**

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

### **Territory Management**

Oracle Sales Online takes advantage of the enhanced Territory Management module to assign accounts (customers), opportunities and leads to salespeople.

Administrators define flexible territories where qualifiers can be defined using any attribute related to the customers, leads, and/or opportunities.

### **Resource Management**

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

### **Fulfillment**

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

### **Marketing**

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

### **Business Intelligence System**

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

## **1.3.1 ERP Applications**

The following ERP applications integrate with Oracle Sales Online.

- Oracle Service
- Oracle Receivables
- Oracle Order Management

- Oracle Inventory
- Oracle Advanced Pricing
- Oracle Shipping

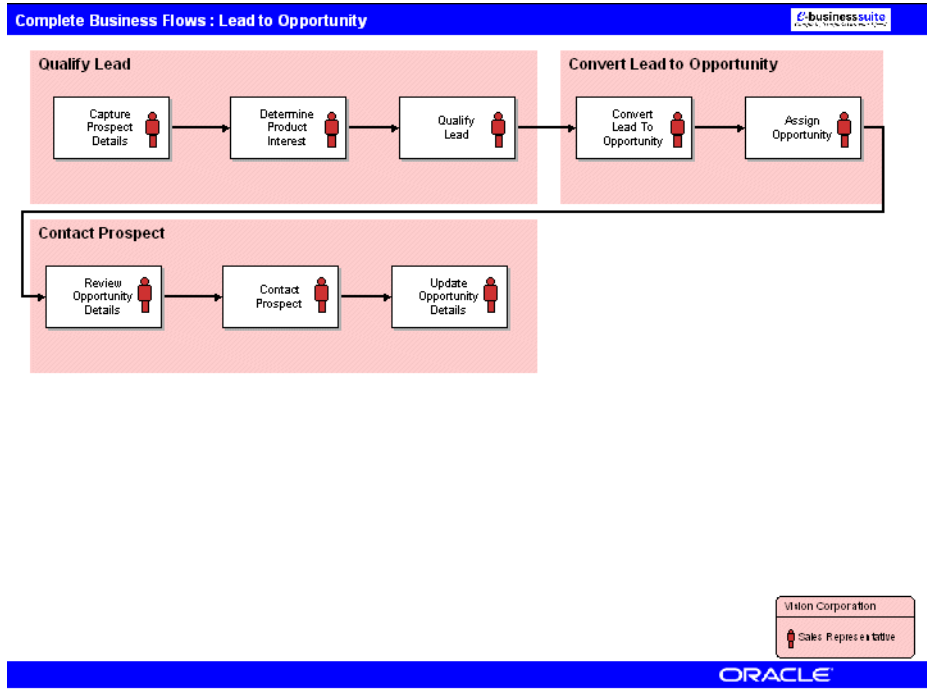
### 1.3.2 CRM Applications

The following CRM applications integrate with Oracle Sales Online.

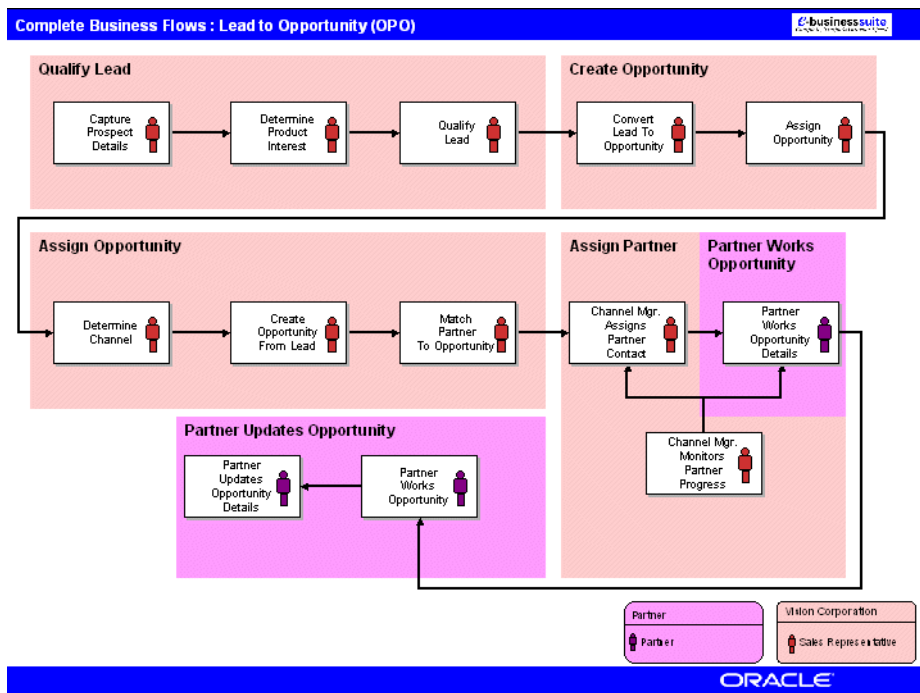
- Oracle TeleSales
- Oracle Incentive Compensation
- Oracle Partners Online
- Oracle Marketing
- Oracle Collections
- Oracle Order Capture
- Oracle iStore
- Oracle Configurator
- Oracle Installed Base

## 1.4 Process Flow for Lead to Opportunity

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

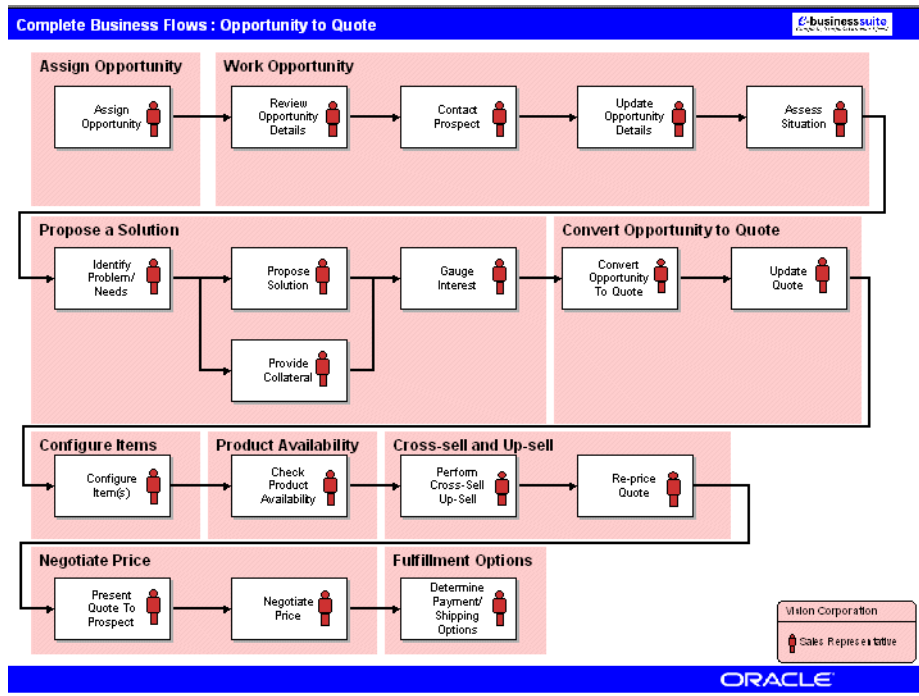


This process flow shows a qualified lead being turned into an opportunity. The opportunity is then assigned to a sales rep.



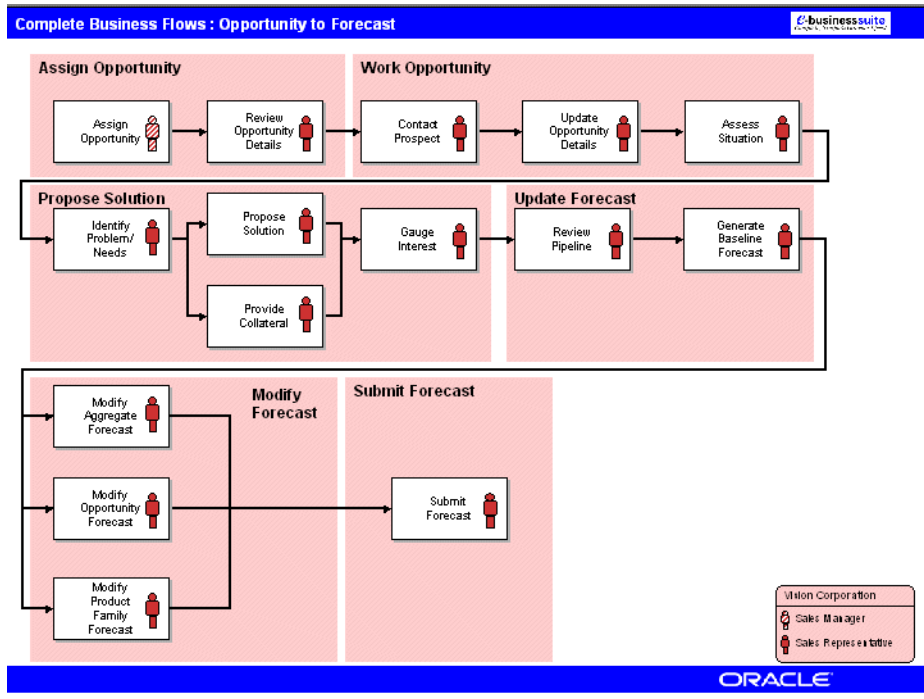
## 1.5 Process Flow for Opportunity to Quote

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



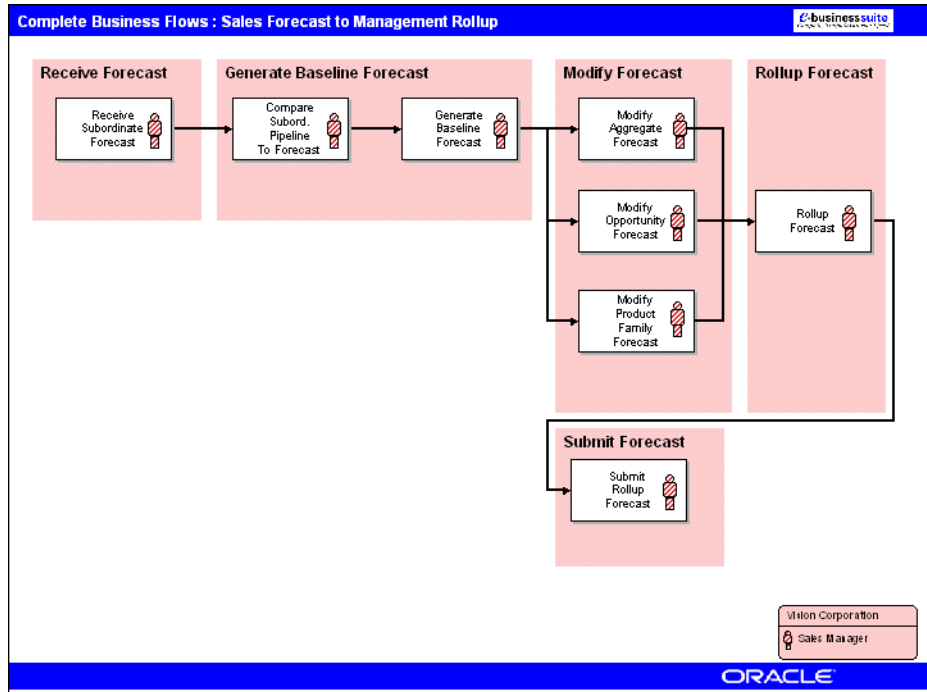
## 1.6 Process Flow for Opportunity to Forecast

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



## 1.7 Process Flow for Sales Forecast to Management Rollup

This process flow shows the sales forecast to management rollup.



## 1.8 What's New

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

The following features are new to Oracle Sales Online.

- [Opportunity History Tracking](#)
- [Copy Opportunity](#)
- [Contact Interest](#)
- [Forecast Enhancements](#)
- [Event Registration](#)
- [Address Validation](#)
- [Flexible Data Security](#)

### **Opportunity History Tracking**

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

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

### **Copy Opportunity**

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

### **Contact Interest**

You can keep track of the product interests associated with your contacts. The System Administrator sets up the interest types (products) and maps these interest types to people, leads, or opportunities. For example, the System Administrator sets

up an interest type called "Desktop" which can be used for people, leads, or opportunities. When a contact is created, the record can indicate that the contact is interested in computers, specifically desktops.

### **Forecast Enhancements**

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

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

### **Event Registration**

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

### **Address Validation**

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

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

### **Flexible Data Security**

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

## 1.9 What's Obsolete

The following profiles in Oracle Sales Online are obsolete:

- OSO: Opportunity Worksheet Threshold Amount
- OTS: Enable Address Validation (replaced by OS: Enable Address Validation)
- OSO: Enable Lead Share
- OSO: Lead Share Application ID
- OSO: Lead Share Company Code
- OSO: Lead Share Default Org Text
- OSO: Lead Share Host Name
- OSO: Lead Share LETS Server
- OSO: Lead Share Partner ID
- OSO: Lead Share Port Number
- OSO: Lead Share Proxy Host
- OSO: Lead Share Proxy Port
- OSO: Lead Share Responsibility ID
- OSO: Lead Share Salesforce ID
- OSO: Lead Share User ID
- OS: Auto-relate lead note to Customer,
- OS: Auto-relate lead note to Primary Contact
- OS: Territory Minimum Number of Records for Parallel Processing
- OS: Territory Number of Child Processes
- OS: Territory Records to Open for Processing Changed Accounts

The following concurrent programs are obsolete:

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

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# Overview of Using Oracle Sales Online

This chapter provides an overview of the administration section and a summary of the tabs in Oracle Sales Online. The available functionality is covered in more detail in the chapters that follow.

- [Section 2.1, "Accessing Administration"](#)
- [Section 2.2, "Summary of Tasks"](#)

## 2.1 Accessing Administration

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

### Prerequisites

None

### Login

Log in to Self Service Administration.

### Responsibility

Sales Online Administrator

### Steps

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

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

- [Section 14.2.1, "Globalization"](#)

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

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

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

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

### **See Also**

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

## **2.2 Summary of Tasks**

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

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

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

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

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



# Part II

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## User Procedures

This part contains the following chapters:

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



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# Getting Started

Sections in this chapter include:

- [Section 3.1, "Overview of Getting Started"](#)
- [Section 3.2, "Getting Started"](#)
- [Section 3.3, "Managing Account Settings"](#)
- [Section 3.4, "Personalization"](#)
- [Section 3.5, "Setting Profiles"](#)
- [Section 3.6, "Overview of Managing Opportunities"](#)
- [Section 3.7, "Overview of Managing Forecasting"](#)
- [Section 3.8, "Overview of Managing Customers"](#)

## 3.1 Overview of Getting Started

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

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

## 3.2 Getting Started

When you first log in to Oracle Sales Online, you should set up your home page, profiles, and preferences. You can decide which items you want to display on your home page and on the summary pages of each Oracle Sales Online tab.

These topics are related:

- [Section 3.3, "Managing Account Settings"](#)
- [Section 3.4, "Personalization"](#)
- [Section 3.5, "Setting Profiles"](#)
- [Section 4.1, "Overview of the Home Page"](#)

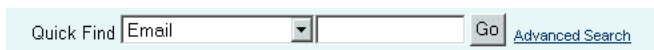
### 3.2.1 Using Quick Find or Advanced Search

You can search for information in Oracle Sales Online using either [Quick Find](#) or [Advanced Search](#). Quick Find is a single field search tool used for basic searches and Advanced Search is a multi-field search used for more complex search requests.

### 3.2.2 Quick Find

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

This is a screenshot of the Quick Find tool. The drop down lists all the available fields for which you can search.



To search using **Quick Find**:

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

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

- Email: matches the email address for organizations, people and contacts
- Opportunity: matches the opportunity name
- Owner: matches the opportunity owner
- Organization: matches the organization name

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

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

## 2. Click Go.

### Results

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

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

### 3.2.3 Advanced Search

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

#### Prerequisites

None

#### Example

You are trying to locate a person or contact and only have the person's telephone number. Whereas Quick Find is limited to a few fields, Advanced Search allows you to customize the search to use the phone number as search criteria.

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

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

#### Navigation

Click Advanced Search

#### Steps

To search using **Advanced Search**:

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

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

## Organization Search

Saved Searches

Select the organization, address, sales team, and relationship parameters below. Optionally, set the display and sort options. Click the "Search" button to run the search.

**Tip:** You can save your search by typing a "Search Name" and clicking the "Save" button at the bottom of the window.

### Organization Information

Organization Name <input type="text"/>	Number <input type="text"/>
Pronunciation <input type="text"/>	Alias <input type="text"/>
SIC Code Type <input type="text" value=""/>	SIC Code <input type="text"/>
DUNS Number <input type="text"/>	External System Number <input type="text"/>
Tax Reference <input type="text"/>	Phone Number <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>
Email Address <input type="text"/>	(Country Code, Area Code, Number, Extension)
Customer Category <input type="text" value=""/>	Business Line <input type="text"/>
Annual Revenue <input type="text" value=""/>	Lifetime Value <input type="text"/>
<input type="checkbox"/> Only Customers with Order History	
Organization Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Both	
Context Value <input type="text"/>	<input type="button" value="Go"/>

Select Context Value and click 'Go' to show relevant fields.

### Address Information

Country <input type="text" value=""/>
Type <input type="text" value=""/>
Address Status <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Both

If address filters are not entered, the identifying address will be returned in your result set.

### Sales Team Information

<input checked="" type="radio"/> Sales Group <input type="text" value=""/>	Salesperson <input type="text" value="Henry. Paul(PHEN)"/>	<input type="button" value="Go"/>
--	--	-----------------------------------

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

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

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

### 3.2.4 Your Home Page

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

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

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

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

---

---

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

Initial Build of Opportunity and Lead Bins

Initial Load for Lead Reports

Initial Load for Opportunities Reports

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

---

---

### **See Also**

[Section 4.1.2, "Setting Up Bins, Charts, and Reports"](#)

[Section 4.1.4, "Editing a Bin, Chart, Report, or Graph"](#)

[Section 4.1.6, "Internal Tools"](#)

[Section 4.1.7, "Using Territory Lookup"](#)

[Section 4.1.8, "Using Event Lookup"](#)

[Section 4.1.9, "External Tools"](#)

## **3.3 Managing Account Settings**

Use the Account Settings section to change your password or update your personal information.

- [Section 3.3.1, "Changing Your Password"](#)
- [Section 3.3.2, "Updating Personal Information"](#)

### **Reference**

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

### 3.3.1 Changing Your Password

Use the following procedure to change your password.

#### Navigation

Profile > Account Setting > Change Password

#### Change Password

\* Current Password

\* New Password

\* Re-Enter New Password

Password must be within 6 characters to 30 characters

#### Steps

1. Enter your current password.

2. Enter your new password.

Your password must be at least six characters long. You can use numbers or letters.

3. Re-enter your new password.

4. Click **Update**.

---

---

**Note:** You cannot update your user name.

---

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#### Reference

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

## 3.3.2 Updating Personal Information

This information affects other applications in the Sales suite.

### Navigation

Profile > Account Setting > Personal Information

#### Personal Information

User Name	QATESTREP_US
* First Name	<input type="text" value="QATESTREP_US"/>
* Last Name	<input type="text"/>
* Email	<input type="text"/>

### Steps

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

### Reference

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

## 3.4 Personalization

General personal preferences are determined by the default values set by the system administrator. You can change the following preferences:

- [Section 3.4.1, "Navigation Preferences"](#)
- [Section 3.4.2, "Display Preferences"](#)
- [Section 3.4.3, "Quick Menu"](#)

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

### 3.4.1 Navigation Preferences

#### Navigation

Profile > Personalization > Navigation Preferences

#### Switching Current Responsibility

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

#### Setting Default Responsibility

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

### 3.4.2 Display Preferences

#### Navigation

Profile > Personalization > Display Preferences

#### Language

Change the language with which the user interface labels are displayed. Choose from the selections in the drop down list in the Language field.

#### User Currency

This is the transaction currency used when creating leads and opportunities. For existing leads or opportunities, this also controls the user currency displayed on the

detail pages. If the user currency is different than the transaction currency, the transaction currency is converted and displayed in the User Amount field.

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

### **Date Format**

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

### **Display Style**

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

### **Display Rows per Page**

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

### **Display Blank Rows per Table**

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

### **Search Display**

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

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

## **3.4.3 Quick Menu**

This feature is not available in Oracle Sales Online.

### **Navigation**

Profile > Personalization > Quick Menu

## 3.5 Setting Profiles

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

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

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

- **User Level:**

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

- **Responsibility Level:**

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

- **Application Level:**

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

- **Site Level:**

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

### Navigation

Profiles > Sales Online

### Profile Categories

This section covers the following profile categories:

- [Section 3.5.1, "Setting General Profiles"](#)
- [Section 3.5.2, "Setting Home Page Profiles"](#)
- [Section 3.5.3, "Setting Lead Profiles"](#)

- [Section 3.5.4, "Setting Opportunity Profiles"](#)
- [Section 3.5.5, "Setting Forecast Profiles"](#)
- [Section 3.5.6, "Setting Customer Profiles"](#)
- [Section 3.5.7, "Setting Compensation Profiles"](#)
- [Section 3.5.8, "Setting Contact List Profiles"](#)

### Note

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

## 3.5.1 Setting General Profiles

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

### Navigation

Profiles > Sales Online > General

**Sales Online General Preferences**

Default Country

Default Role

Default Start Page

Track Records for  Days

The value must not exceed 14 days. Setting the value to zero will disable the feature.

Display Creation and Modified Tracking

Enable Record Counting

### Steps

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

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

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

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

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

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

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

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

Click **Update** to save your changes.

## 3.5.2 Setting Home Page Profiles

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

Home page preferences are categorized into four sections:

- Bin Preferences
- News Preferences
- Report Preferences
- Chart Preferences

### **Note**

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

### **Navigation**

Profiles > Sales Online > Home Page

## Home Page Preferences

Update Restore

---

**Narrow Bin Preferences**

Remove	*Bin Number	*Bin Name	Edit
No records found matching the given criteria.			
Add New Rows			

**Chart Preferences**




Remove	*Chart Number	*Chart Name	Edit
No records found matching the given criteria.			
Add New Rows			

**Report Preferences**

Remove	*Report Number	*Report Name
<input type="checkbox"/>	1	My Home Page Report
Add New Rows		

**News Preferences**

Number of News Headlines

Remove	Symbol
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

\* Indicates required fields

Update Restore

### Steps

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

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

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

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

### **Reference**

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

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

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

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

Click **Update** to save your changes.

## **3.5.3 Setting Lead Profiles**

Lead profiles affect user preferences for lead management.

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

### **Navigation**

Profiles > Sales Online > Leads

## Sales Online Lead Preferences

---

Default Status

Default Channel To

Default Response Channel

Default Budget Status

Default Timeframe

---

**Personalized Searches**

Remove	Search Name	Use as Summary Page Default
	<a href="#">My Leads(Owner)</a>	<input checked="" type="radio"/>
	<a href="#">My Leads(Sales Team)</a>	<input type="radio"/>
	<a href="#">Referral Leads</a>	<input type="radio"/>

### Steps

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

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

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

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

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

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

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

Click **Update** to save changes.

## 3.5.4 Setting Opportunity Profiles

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

### Navigation

Profiles > Sales Online > Opportunity

### Sales Online Opportunity Preferences

---

Default Sales Stage

Default Win Probability

Default Status

Default Close Date To  Days Ahead

Default Channel To

Default Sales Methodology

Default Response Code

Display Sales Methodology Progression

\* The sales methodology progression will be displayed on the opportunity details screen.  
\* If any profile option is set to a null value, the site-level value, if present, will be used by default.

### Personalized Searches

Remove	Search Name	Use as Summary Page Default
<input type="checkbox"/>	<a href="#">My Open Opprties(Sales Credit)</a>	<input type="radio"/>
<input type="checkbox"/>	<a href="#">My Open Opprties(Sales Team)</a>	<input type="radio"/>
<input type="checkbox"/>	<a href="#">My Opprties(Sales Credit)</a>	<input type="radio"/>
<input type="checkbox"/>	<a href="#">My Opprties(Sales Team)</a>	<input type="radio"/>
<input type="checkbox"/>	<a href="#">My Open Opprties IIII</a>	<input type="radio"/>
<input type="checkbox"/>	<a href="#">My Open Opprties IIIv</a>	<input checked="" type="radio"/>

### Personalized Reports

Remove	Report Name	Type
<input type="checkbox"/>	<a href="#">NIK-OPPTY- Report</a>	Opportunity Summary

### Steps

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

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

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

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

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

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

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

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

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

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

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

Click **Update** to save your changes.

## 3.5.5 Setting Forecast Profiles

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

### Navigation

Profiles > Sales Online > Forecasting

### Sales Online Forecast Preferences

---

Default Forecast Period Type

Default Forecast Currency

Default New Rows in Worksheet To

Default Forecast Category

Default Sales Credit Type

Autosubmit Worksheets

Opportunity Worksheet Threshold Amount

Pipeline Calculation Using

Default My Forecast Type

Display Grand Total

\* Use the Forecast threshold preference to define the threshold amount to be used in opportunity worksheet.

\* The profile Pipeline Calculation Using applies to opportunity worksheet only.

### Personalized Reports

Remove	Report Name	Type
--------	-------------	------

No records found matching the given criteria.

### Steps

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

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

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

displays Won Date values, the Forecast field displays the Weighted Pipeline values, and the Best Case field displays Pipeline amount.

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

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

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

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

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

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

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

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

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

Win probability 60-79:

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

Win probability 40-59:

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

Win probability 0-39:

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

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

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

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

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

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

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

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

Click **Update** to save your changes.

## 3.5.6 Setting Customer Profiles

### Navigation

Profiles > Sales Online > Customer

### Sales Online Customer Preferences

---

**Customer Preferences**

Default Organization Phone Type

Default Person Phone Type

Default Customer Category

Default Address Type

Default Person to Organization Relationship

Default Organization to Organization Relationship

Default Person to Person Relationship

Display Interactions For Last  Days

Default Account Site Use

Default Customer Language

\* If any profile option is set to a null value, the site-level value, if present, will be used by default.

**Contact List Preferences**

Default Contact Status

Default Related To Type

Default Address Status

Default Buy/Sell Indicator

Default Issue Scheme

Default Public Status

Default Primary Address Status

## Steps

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Click **Update** to save your changes.

For information on contact list preferences, see [Section 3.5.8, "Setting Contact List Profiles"](#).

### 3.5.7 Setting Compensation Profiles

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

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

#### Navigation

Profiles > Sales Online > Compensation

#### Sales Online Compensation Preferences

---

Default Period

#### Steps

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

Click **Update** to save your changes.

## 3.5.8 Setting Contact List Profiles

### Navigation

Profiles > Sales Online > Contact List

### Steps

The profiles for Contacts include:

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

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

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

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

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

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

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

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

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

Click **Update** to save your changes.

## 3.6 Overview of Managing Opportunities

This topic covers:

- [Section 7.1, "Overview of the Opportunity Tab"](#)
- [Section 7.2, "Personalizing Opportunity Summary"](#)
- [Section 7.3, "Creating an Opportunity"](#)
- [Section 7.5, "Maintaining Opportunity Detail"](#)
- [Section 7.7, "Viewing Opportunity Line Subtotals"](#)
- [Section 7.8, "Searching for an Opportunity"](#)
- [Section 7.9, "Copying an Opportunity"](#)
- [Section 7.22, "Closing an Opportunity"](#)
- [Section 7.10, "Creating a Quote from an Opportunity"](#)
- [Section 7.19, "Tracking Win/Loss Information"](#)
- [Section 7.20, "Adding Multiple Purchase Items with the Same Product Category"](#)
- [Section 7.23, "Sales Credits"](#)
- [Section 7.25, "Notes"](#)
- [Section 7.12, "Sales Teams"](#)
- [Section 7.26, "Tasks"](#)
- [Section 7.27, "Attachments"](#)
- [Section 7.28, "Opportunity Reports"](#)

### 3.6.1 Opportunity Overview

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

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

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

### **Overview of Sales Methodology**

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

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

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

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

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

### **Elements of a Sales Methodology**

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

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

## 3.7 Overview of Managing Forecasting

This topic covers:

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

### 3.7.1 Forecasting Overview

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

#### **Overview of Forecasting**

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

## Worksheets

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

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

## Two Views of Forecast

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

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

## Overview of Multi-Currency

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

Your sales application calculates currency conversion for individual opportunity purchases on an estimate of the actual conversion rate that is effective on the date a sales person predicts an opportunity is going to close.

The estimated conversion rate is called a pseudo-period rate because it is based on the currency conversion rate on a single day during the period. The application uses that one conversion rate for the whole period.

If a pseudo-period conversion rate is missing, then the program looks back in time to find a conversion rate. How far back is determined by setting the value of the profile OS: Maximum Roll Days for Converting Amount. If no rate is found within this period, then your application displays asterisks and a message that no rates were found.

Forecasting uses currency conversions in two places: to calculate the total forecast amounts at the bottom of the forecast window and to sum all forecasts from the sales person to obtain group forecasts. In both cases it uses the pseudo-period rates for the conversion. Forecasting calculates currency conversion based upon pseudo-period rates only.

If you are a manager or administrator, on the forecast main page the currency is converted all the time. But, on the opportunity worksheet and the product category worksheet, currency amounts are displayed in subordinates.

## 3.8 Overview of Managing Customers

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

This topic covers:

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

### 3.8.1 Managing Organizations Overview

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

### 3.8.2 Managing Persons Overview

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

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

### 3.8.3 Managing Contacts Overview

Within the Customer tab you will find the Contact subtab.

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

A simple example:

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

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

### **3.8.4 Managing Contact Lists Overview**

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



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# Your Home Page

Sections in this chapter include:

- [Section 4.1, "Overview of the Home Page"](#)
- [Section 4.1.2, "Setting Up Bins, Charts, and Reports"](#)
- [Section 4.1.3, "Available Bins and Charts"](#)
- [Section 4.1.4, "Editing a Bin, Chart, Report, or Graph"](#)
- [Section 4.1.5, "Editing "My Favorites" Bin"](#)
- [Section 4.1.6, "Internal Tools"](#)
- [Section 4.1.7, "Using Territory Lookup"](#)
- [Section 4.1.8, "Using Event Lookup"](#)
- [Section 4.1.9, "External Tools"](#)

## 4.1 Overview of the Home Page

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

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

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

### 4.1.1 Running Concurrent Programs for Materialized Views

Before users can personalize home pages, the following concurrent programs must be run. These concurrent programs populate materialized views for the first time. A materialized view is an aggregation table. Materialized views help to improve performance.

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

For a complete build:

- Initial Build of Opportunity and Lead Bins
- Initial Load for Lead Reports
- Initial Load for Opportunities Reports

For an incremental build:

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

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

## 4.1.2 Setting Up Bins, Charts, and Reports

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

### Navigation

Profiles > Sales Online > Home Page

### Steps

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

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

For a list of the available bins and charts, see [Section 4.1.3, "Available Bins and Charts"](#).

## 4.1.3 Available Bins and Charts

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

### Navigation

Profiles > Home Page > Drop down under Bin Name

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

List of available bins and charts:

- **New Leads:** This bin provides the count and amount of leads assigned to the user/period, rolling up to a sales person. Only the leads that are assigned to a sales group, and to a sales person, are rolled up and displayed in this bin.
- **Opportunity by Close Date:** This chart provides the ability to graph the open opportunities by close date. The opportunities that have a valid sales stage, an assigned sales group, and a resource, are rolled up and displayed in this chart.

The decision date for the opportunities shown must be in the selected period range for this chart.

- **Opportunity by Status:** This chart provides the ability to graph the opportunity by status. The chart shows the open and won opportunities that have a decision date within the period range selected. The opportunities should have valid sales stage, be assigned to a sales group and a resource.
- **Opportunity by Win Probability:** This chart gives the ability to graph the opportunities by win probability. The opportunities should have a decision date within the period range selected, be assigned to a valid sales group and a resource.
- **Leads:** This chart gives the sales person the ability to graph new leads. The leads assigned to valid sales groups and resources (created in the selected time period range) are rolled up.
- **Forecast History-Self:** This chart gives the ability to graph the submitted forecast numbers for a sales person. Forecasts with forecast category and a sales credit type that do not match the default setting are not shown in this chart.
- **Forecast History-Subordinates:** This chart gives the sales manager the ability to graph the submitted forecast number for his/her subordinate sales representatives or groups. Forecasts with forecast category and a sales credit type that do not match the default setting are not shown in this chart.
- **Top Customers:** This chart gives the sales person the ability to graph the lifetime value based on ordered amount of his/her top "n" customers. In order for the Top Customers chart to work, it is required that you run the Oracle Order Management concurrent program "Calculate Party Totals."
- **Open Opportunities:** This bin shows the pipeline Amount For Forecastable opportunities within the period or parameters indicated. This bin does not check the status of the opportunity.
- **Won Opportunities:** This bin shows the won amount for forecastable opportunities within the period or parameters indicated. This bin does not check the status of the opportunity.
- **My Forecast:** This bin provides a list of all forecast numbers that have been submitted per period by a sales person. If the value for "My Forecast Type" is set to "My Subordinate Forecasts" the forecast values submitted for the subordinate groups are shown here.
- **My Favorites:** This bin provides the ability to bookmark application pages, saved reports, or saved searches so that you can run them at a later time. Free

URLs and the links published by system administration on the external tools page can also be saved for later access in this bin.

- **Win/Loss Ratio:** This bin provides a count of won opportunities, losses, and the ratio per period rolling up to a sales person. Loss analysis is an effective tool used by management to measure the sales effectiveness of the organization. The percentage data is based on the total opportunity amounts.
- **Opportunity Status:** This bin shows links to a set of reports explained below:
  - **Closed Opportunities** - Opportunities that have been closed in the last "n" days and roll up to the logged in user are shown here. The value "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days."
  - **Aging Opportunities** - Opportunities that have been open for more than "n" days and roll up to the logged in user are shown in this report. The value "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Aging Days."
  - **High Value, About to Close** - Opportunities rolling up to the log in user that have values greater than certain amount and the close date is in the next "n" days are shown here. The opportunity value is controlled by "OSO: Opportunity Variance Bin Reports Amount" profile. The value for 'n' is controlled by "OSO: Opportunity Variance Bin Reports Number of Days" profile.
  - **High Value, Low Probability** - Open opportunities with value greater than the value specified by "OSO: Opportunity Variance Bin Reports Amount" profile and win probability less than the value specified by "OSO: Opportunity Variance Bin Reports Win Probability" profile that roll up to the log in person are shown in this report.
  - **Lost Opportunities** - Opportunities that roll up to the log in person and have been updated to "Lost" status in the last "n" days are shown in this report. The value for "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days."
  - **Opportunities About to Lose** - Open opportunities that roll up to the log in person and have a win probability less than the value set for "OSO: Opportunity Variance Bin Reports Win Probability" and have a decision date in the next "n" days. The value for "n" is controlled by the profile "OSO: Opportunity Variance Bin Reports Number of Days."
  - **Opportunities Potentially lost** - Open Opportunities that roll up to the log in person and have a decision date in the next "n" days are shown in this

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

**See Also**

[Section 4.1.2, "Setting Up Bins, Charts, and Reports"](#)

[Section 4.1.4, "Editing a Bin, Chart, Report, or Graph"](#)

For information about the profile options related to the following bins, please refer to the *Oracle Sales Online Implementation Guide*.

## 4.1.4 Editing a Bin, Chart, Report, or Graph

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

### Navigation

Home > Edit

### Alternative 1

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

### Steps

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

### Alternative 2

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

### Steps

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

## Example

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

Open Opportunities <span>Edit</span>		
Month	Count	CAD
<a href="#">NOV-02</a>	0	0.00
<a href="#">DEC-02</a>	0	0.00
<a href="#">JAN-03</a>	0	0.00
<a href="#">FEB-03</a>	0	0.00
<a href="#">MAR-03</a>	0	0.00

• Amount is scaled as: In Hundreds  
 • Last refreshed on 13-AUG-2002

## Open Opportunities Parameters

Parameters

Number Rows

Scaling

Period Type

Category Type

Sales Group

Credit Type

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

## 4.1.5 Editing "My Favorites" Bin

The "My Favorites" bin, allows you to further customize a bin to list items that are particularly important to you.

For a list of available bins [Section 4.1.2, "Setting Up Bins, Charts, and Reports"](#)

### Navigation

Home Page > Edit

### Steps

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

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

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

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

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

### Edit My Favorites Bin

**Favorite Pages**

Remove	Row Number	*Type	*Report Name
<input type="checkbox"/>	2	Application Pages	Lead Reports
<input type="checkbox"/>	3	External Tools	Travel Reservations
<input type="checkbox"/>	6	Application Pages	Task Summary
<input type="checkbox"/>	11	Application Pages	Lead Search
<input type="checkbox"/>	15	Application Pages	Opportunity Reports

**Web Addresses**

Remove	*Row Number	*Bookmark Name	*Web Address
<input type="checkbox"/>	1	My Yahoo	http://my.yahoo.com
			http://
			http://
			http://

**Tip:** To add a web address to your Favorites bin, type in the bookmark name, and the complete web address as in http://www.oracle.com above.

\* Indicates required fields

## 4.1.6 Internal Tools

The following tools are available from the Home Page:

- [Section 4.1.7, "Using Territory Lookup"](#)
- [Section 4.1.8, "Using Event Lookup"](#)

## 4.1.7 Using Territory Lookup

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

### Navigation

Home > Tools > Internal Tools > Territory Lookup

### Prerequisites

None

### Steps

Follow these steps to use the Territory Lookup Tool:

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

The list of salespeople who are resources for a territory for the selected company is displayed.

4. Optionally, enter the State.
5. Click **Search**.

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

## 4.1.8 Using Event Lookup

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

### Navigation

Home > Tools > Internal Tools > Event

### Steps

Follow these steps to use the Event Lookup tool:

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

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

### Reference

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

## 4.1.9 External Tools

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

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

These links are also available to add to your "My Favorites" bin on the home page. See [Section 4.1.2, "Setting Up Bins, Charts, and Reports"](#) for more information about setting up bins, charts, and reports.

## Navigation








Administration > Sales > Home Page > External Tools

## Steps

1. To add an external tool:
  - a. Enter the required information for Category, Link Text, Link, Link Type, and Description
  - b. Check the Enabled box.
2. To disable an existing or seeded external tool:
  - a. Deselect the Enabled box.
3. To remove an external tool:
  - a. Click the Remove icon.
  - b. Seeded external tools cannot be removed, they can only be disabled.
4. Click **Update**.

## External Tools Administration

Update Restore

Remove	*Category	*Link Text	*Link	*Link Type	*Description	Enabled	Seeded
	Self Service Applications	Project Listing	PA_PROJ_LIST	Function	Use this link to view all projec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Self Service Applications	The Dun & Bradstreet Compar	HZ_PARTY_SEARCH	Function	Search for company details ir	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Self Service Applications	Active Expense Reports	OIE_ACTIVE_EXPENSE_REPO	Function	Expense reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Self Service Applications	Travel Reservations	http://www.etravel.com	URL	Use this link to do travel reser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Collaboration	Meeting	http://meeting.oracle.com	URL	Use this link for collaborative :	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				URL		<input type="checkbox"/>	
				URL		<input type="checkbox"/>	

Previous [Next](#)

Update Restore

Sections in this chapter include:

- [Section 5.1, "Overview of the Calendar Tab"](#)
- [Section 5.1.1, "About Calendar Profiles"](#)
- [Section 5.1.2, "Using Calendar Views"](#)

## 5.1 Overview of the Calendar Tab

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

### Reference

*Oracle CRM Application Foundation User Guide*

### 5.1.1 About Calendar Profiles

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

Calendar profiles include:

- **Personalize:** Configure your calendar work schedule  
Navigation: Profiles > Calendar > Personalize
- **Privileges:** Grants access to other users to view your calendar  
Navigation: Profiles > Calendar > Privileges

- **Group Calendar:** Request a new Group Calendar to be created or Subscribe to an existing group calendar.  
Navigation: Profiles > Calendar > Group Calendar
- **Switch Calendar:** View a different calendar to which you have access  
Navigation: Profiles > Calendar > Switch Calendars
- **Categories:** Build categories for grouping your tasks  
Navigation: Profiles > Calendar > Categories
- **Time Zone:** Select the time zone in which you work. This must be set correctly for tasks to display on your calendar properly.  
Navigation: Profiles > Calendar > Time Zone
- **Administration**  
Navigation: Profiles > Calendar > Administrator

## Reference

*Oracle CRM Application Foundation User Guide*

### 5.1.2 Using Calendar Views

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

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

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

## **Reference**

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



Sections in this chapter include:

- Section 6.1, "Overview of the Lead Tab"
- Section 6.1.1, "Personalizing Leads"
- Section 6.1.3, "Creating a Lead"
- Section 6.1.4, "Maintaining a Lead"
- Section 6.1.2, "Searching for a Lead"
- Section 6.1.5, "Assigning a Lead Owner"
- Section 6.1.6, "Qualifying a Lead"
- Section 6.1.7, "Rating a Lead"
- Section 6.1.8, "Selecting a Sales Channel"
- Section 6.1.9, "Converting a Lead to an Opportunity"
- Section 6.1.10, "Linking a Lead to an Opportunity"
- Section 6.1.11, "Appending Lead Lines to an Opportunity"
- Section 6.1.12, "Declining a Lead"
- Section 6.1.13, "Using Mass Update"
- Section 6.1.14, "Using Mass Evaluate"
- Section 6.1.15, "Attaching a Contact to a Lead"
- Section 6.1.16, "Creating a Note"
- Section 6.1.17, "Viewing All Notes"
- Section 6.1.18, "Viewing Note History"

- [Section 6.1.19, "Creating a Task"](#)
- [Section 6.1.20, "Creating an Attachment"](#)
- [Section 6.1.21, "Sales Teams"](#)
- [Section 6.1.22, "Lead Reports"](#)

## 6.1 Overview of the Lead Tab

Use the Lead tab to view and manage leads. A lead is an expressed customer interest that a sales representative uses to determine whether there is a potential for a sales opportunity. An opportunity is a sales deal that can be forecasted.

Leads may be generated through different sources:

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

Leads are often associated with a person or organization. A lead enters into the system, is ranked, and assigned to a sales resource. After key information is gathered, a lead is qualified manually or by the system automatically depending on your settings. The goal of a sales representative is to qualify a lead and convert to an opportunity which eventually results in an order.

### Reference

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

## 6.1.1 Personalizing Leads

Personalize the Leads summary page by saving a search.

### Navigation

Lead > Leads > Personalize

### Prerequisites

None

### Steps

Follow these steps to personalize leads:

1. Click **Personalize**.

The Lead Search page opens.

2. Change, add, or remove search parameters. Search fields for lead information include:
  - Lead Name
  - Lead Name / Value pairs
  - Lead Number
  - Lead Owner
  - Project
  - Assigned Date Range
  - Creation Date fixed and relative time frames (for reusable work queue of new leads)
  - Expiration Date
  - Last Updated fixed and relative time frames (for tracking neglected leads)
  - Contact details (including name and role)
  - Status
  - Lead Rank
  - Channel
  - Response Channel

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

Search fields for customer information include:

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

Search fields for sales team information include:

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

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

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

## 6.1.2 Searching for a Lead

Search for leads using quick find or advanced search.

### Navigation

Lead > Leads

### Prerequisites

A lead must exist.

### Steps

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

The Lead Detail page opens.

## 6.1.3 Creating a Lead

Use leads to capture the initial contact with potential customers, gathering enough information to indicate to a sales organization whether or not there is sufficient interest on the part of the buyer.

### Navigation

Lead > Leads

### Prerequisites

None

### Related Profiles

See [Section 3.5.3, "Setting Lead Profiles"](#).

### Steps

Follow these steps to create a lead:

1. Click **Create**.

The Create Lead page opens.

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

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

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

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

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

6. Enter the name of the lead that will be used to identify the lead.
7. Check the Urgent or Qualified boxes to identify the lead as urgent or qualified. If the Qualified box is left unselected and the profiles are properly set for Automatic Lead Qualification, this lead will be run through the Lead Rules Engine automatically upon creating the lead.
8. Select a project to associate this lead to by entering the project name and clicking **Go**.
9. Optionally, enter the Lead Owner. If Lead Owner is left blank, the lead will be automatically assigned.
10. Select a Status from the drop down list. This is a required field.
11. Select a Channel from the drop down list.

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

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

- Select the Lead Rank from the drop down list.

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

- Select the Response Channel from the drop down list.
- Select the Budget Status from the drop down list.
- Select the Time Frame from the drop down list.
- Enter a Source Name and click **Go**.
- Enter an Offer and click **Go**.
- Select a Referral Type from the drop down list.
- Enter a Referred By name and click **Go**.
- Enter a Budget amount and select the currency with which the budget is to be associated. Purchase Items will reflect the same currency code as selected here.
- Select a Close Reason from the drop down list. Close reason is a required field when lead status is "Closed".
- In the Purchase Items section, select a Product Category from the drop down list.
  - Select an Inventory Item, Unit of Measure, Quantity, Amount, Source Name, and Offer, if applicable.
- In the Contacts table, add contacts by:
  - Entering the person's name that you wish to add as a contact in the "Add a Person" field and clicking **Go**.
- In the Notes table, enter a note by:
  - Selecting the Type.
  - Selecting the Status.
  - Entering the note text.
  - If you want to relate this note to a party, enter the requested information.

## 12. Click **Create**.

## 6.1.4 Maintaining a Lead

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

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

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### Navigation

Lead > Leads

### Prerequisites

A lead must exist.

### Steps

Follow these steps to modify or update an existing lead:

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

The Lead Detail page opens.

The following table describes the Lead Detail fields.

Field	Required Field	Description
Lead Name	Yes	Lead name
Customer	Yes	You can click the link to view the customer details.
Customer Address	No	You can edit information or change the location by clicking the Change Location button.
Project	No	Enter the full or partial name and click <b>Go</b> .
Lead Owner	No	Insert the lead owner. If this field is left blank, the lead is automatically assigned.
Status	Yes	Select a status from the drop down list.

Field	Required Field	Description
Channel	No	Select a channel from the drop down list. The Channel field drives how the lead is going to be worked on. The purpose of the Channel field under the Leads tab is for routing leads (what type of people will be working on the lead).  The values Direct and Indirect do the following: Direct - routes information to an Internal Sales Rep. Indirect - routes information to a Partner  If this field is left blank, the lead channel is automatically assigned.
Timeframe	No	Select a time frame from the drop down list.
Source Name	No	Find a source code by entering the full or partial name and click <b>Go</b> .
Offer Code	No	
Budget	No	Enter the total budget and select a currency.
Decline Reason	No	A decline reason is required only if you click the Decline button. Enter a reason that the lead is being declined.
Close Reason	Yes	If lead status is set to "dead lead" or "loss." Enter the reason that the lead is being closed.
Lead Number	No	View the lead number.
Urgent/Qualified	No	Select that the lead is urgent or qualified with the associated boxes. For Qualified, leave the field blank if you want the rules engine to decide.
Accept	No	Click the Accept button to accept the lead.
Assigned Date	No	Read only field.
Lead Rating	No	Priority of lead. Leave blank if you want the rules engine to assign.
Response Channel	No	Select a vehicle response code from the drop down list.
Budget Status	No	Select a budget status from the drop down list.
Referral Type	No	Select from the drop down list.
Referred By	No	Select from the drop down list.

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

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

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

### 6.1.5 Assigning a Lead Owner

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

#### Navigation

Lead > Leads

#### Prerequisites

None

#### Steps

Follow these steps to re-assign a lead:

1. Search for the lead you want to re-assign using [Chapter 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. In the Lead Owner field, enter a search string and click **Go**.  
If the Lead Owner field is left blank, the lead will be automatically assigned.
4. From the list of values, select the sales team member to which you want to re-assign the lead.
5. Click **Update**.

## 6.1.6 Qualifying a Lead

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

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

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

### Alternative 1-Lead Rules Engine Qualification

#### Navigation

Lead

#### Prerequisites

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

The default is "Yes."

#### Steps

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

Click **Run Leads Engines**.

## Alternative 2-Manual Qualification

### Navigation

Lead

### Prerequisites

None

### Steps

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

1. Search for the lead you want to qualify using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. From the Lead Detail page, check the Qualified box.
4. Click **Update**.

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

## 6.1.7 Rating a Lead

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

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

### Alternative 1-Ranking with the Lead Rules Engine

The Rating Engine replaces the existing Scorecard and Mapping function. (This uses a scorecard to compute a score, and then maps the score to a Rank Mapping.) Leads are graded using specific business-specific logic appropriate to different campaign strategies, regions, or products. Grading enables the business to prioritize follow-up and response handling for effective cost and resource management.

### Navigation

Lead

### Prerequisites

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

### Steps

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

Click **Run Leads Engines**.

### Alternative 2-Manually Rank a Lead

#### Steps

Follow these steps to manually indicate a lead rank:

1. Search for the lead you want to rank using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).

2. Select the lead by clicking the lead link.

The Lead Detail page opens.

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

3. Click **Update**.

## 6.1.8 Selecting a Sales Channel

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

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

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

### **Alternative 1-Lead Rules Engine Selects the Sales Channel**

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

#### **Navigation**

Lead

#### **Prerequisites**

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

#### **Steps**

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

Click **Run Leads Engines**.

### **Alternative 2-Manually Selecting a Sales Channel**

#### **Steps**

Follow these steps to manually select a sales channel:

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

The Lead Detail page opens.

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

3. Click **Update**.

## 6.1.9 Converting a Lead to an Opportunity

You can associate a lead with a specific opportunity by converting a lead to an opportunity, linking the lead to an opportunity, or appending lead lines to an opportunity.

### See Also

[Section 6.1.10, "Linking a Lead to an Opportunity"](#)

[Section 6.1.11, "Appending Lead Lines to an Opportunity"](#)

### Navigation

Lead > Leads

### Prerequisites

A lead must exist.

### Steps

Follow these steps to convert a lead to an opportunity.

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Convert to Opportunity**.  
The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
4. Click **Create Opportunity**.

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

## 6.1.10 Linking a Lead to an Opportunity

Link a lead to an opportunity if, retrospectively, you find that there is a linkage between them. Please note that if you choose this option, the purchase interests on the lead will not automatically appear as purchase interests on the linked opportunity. To do this, you must proceed to append the lead purchase line(s) to the linked opportunity.

### Navigation

Lead > Leads

### Prerequisites

The lead and the opportunity must exist.

### Steps

1. Search for the lead you want to link using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click the **Convert to Opportunity** button.  
The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
4. Choose the **Select** button to indicate the opportunity you have selected.  
The Lead Linking Opportunity Detail page opens.
5. Click **Link to Opportunity**.

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

## 6.1.11 Appending Lead Lines to an Opportunity

Follow these steps to append a lead to an opportunity:

### Navigation

Lead > Leads

### Prerequisites

The lead and the opportunity must exist.

### Steps

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Convert to Opportunity**.  
The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
4. Choose the "**Select**" button to indicate the opportunity you have selected.  
The Lead Linking Opportunity Detail page opens.
5. Check the "Select" box next to the lead lines you want to append to the opportunity.
6. Click **Link to Opportunity**.

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

## 6.1.12 Declining a Lead

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

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

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

### Navigation

Lead > Leads

### Steps

1. Search for the lead you want to decline using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Select a **Decline Reason** from the drop down list. This is a required field.
4. Click the **Decline** button.
5. Click **Update**.

## 6.1.13 Using Mass Update

### Navigation

Lead > Leads

### Prerequisites

None

### Steps

1. From the Leads Summary page, click the Mass Update button.  
The Lead Search page opens.
2. Select search criteria and display options.
3. Click **Search**.
4. To update lead status, select the leads.
5. Choose the appropriate status.  
Close reason is a required field when lead status is closed.

6. Click **Update**.

## 6.1.14 Using Mass Evaluate

### Navigation

Lead > Leads

### Prerequisites

None

### Steps

1. From the Leads Summary page, click the Mass Evaluate button.  
The Lead Search page opens.
2. Select search criteria and display options.
3. Click **Search**.
4. To run leads through the rules engines (qualification, rating and distribution).  
Select the leads, ensure the relevant fields are blank.
5. Click **Run Engines**.  
To override any of the values, choose the values for the selected leads.

## 6.1.15 Attaching a Contact to a Lead

Attach a contact to a lead by following these steps.

### Navigation

Lead > Leads > Contacts

### Prerequisites

A lead must exist.

### Steps

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

The Lead Detail page opens.

3. Click the **Contacts** link.

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

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

The Select a Person page opens.

5. Select the person from the search results by checking the Select box OR search for all people or all contacts by selecting the radio button.

6. Click **Select**.

7. To remove a contact, select Remove and click **Update**.

8. To edit information directly onto the summary table, change the information.

9. Click **Update**.

## 6.1.16 Creating a Note

Follow these steps to create a lead note:

### Navigation

Lead > Leads > Notes

### Prerequisites

None

### Steps

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Notes**.
4. Click **Create**.
5. Select the Note Type from the drop down list. This is a required field.
6. Select the note Status from the drop down list. This is a required field.
7. Enter the note Text in the text box. This is a required field.
8. To relate this note to a party, enter Type and Name information.
9. Click **Create**.

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

## 6.1.17 Viewing All Notes

### Navigation

Lead > Leads > Notes

### Prerequisites

None

### Steps

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Notes**.
4. Click **All Notes**.

## 6.1.18 Viewing Note History

### Navigation

Lead > Leads > Notes

### Prerequisites

None

### Steps

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

## 6.1.19 Creating a Task

Follow these steps to create a lead task:

### Navigation

Lead > Leads > Tasks

### Prerequisites

None

### Steps

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

The Lead Detail page opens.

3. Click **Tasks**.
4. Click **Create**.
5. Enter task details.

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

6. Click **Update**.

## 6.1.20 Creating an Attachment

Follow these steps to create a lead attachment:

### Navigation

Lead > Leads > Attachments

### Prerequisites

None

### Steps

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click the **Attachments** link.
4. Click **Create**.
5. Enter a description. This is a required field.
6. Select a file, enter text, or enter the URL to attach.
7. Click **Create**.

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

## 6.1.21 Sales Teams

You can perform the following functions for sales teams:

- [Section 6.1.21.1, "Adding an Internal Sales Team Member"](#)
- [Section 6.1.21.2, "Adding a Resource Team to a Sales Team"](#)
- [Section 6.1.21.3, "Adding an External Sales Team Member"](#)

### 6.1.21.1 Adding an Internal Sales Team Member

Follow these steps to add an internal sales team member:

#### Navigation

Lead > Leads > Sales Teams > Internal

#### Prerequisites

A lead must exist.

#### Steps

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Sales Team**.
4. Click **Internal**.
5. Enter the last name or partial name of the sales representative in the "**Add a Salesperson**" field, click **Go**.
6. Check the "Select" box.
7. Click **Select**.  
The salesperson will be added to the Sales Team summary table.
8. Select a Role from the drop down list.  
You can view the email address and phone number for this salesperson.
9. Click **Update**.

### 6.1.21.2 Adding a Resource Team to a Sales Team

#### Navigation

Lead > Leads > Sales Teams > Internal

**Prerequisites**

A lead must exist.

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

**Steps**

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Sales Team**.
4. Click **Internal**.
5. In the "Add a Resource Team" field, enter the resource name or the wildcard percent sign (%) and click **Go**.
6. Select a resource from the search results page by clicking the link.
7. Click **Update**.

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

**6.1.21.3 Adding an External Sales Team Member****Navigation**

Lead > Leads > Sales Teams > External

**Prerequisites**

A lead must exist.

**Steps**

1. Search for the lead using [Section 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the lead by clicking the lead link.  
The Lead Detail page opens.
3. Click **Sales Team**.

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

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

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

## 6.1.22 Lead Reports

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

### 6.1.22.1 Viewing the Lead Import Status Report

This report provides the status of the lead imports.

#### Navigation

Lead > Reports

#### Prerequisites

You must have imported leads.

#### Steps

1. Click the Lead Import Status Report link.  
The Lead Import Status Report page opens.
2. Select a Processed Start Date and Processed End Date using the Calendar icon.
3. Select the Source System from the list of values.
4. If you want to rename the search and save it, enter a new search name in the Report Name field.

5. To Save the report without running it, click **Save**.
6. To Save and Run the report, click **Save and Run Report**.
7. To Run the report without saving it, click **Run Report**.



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## Opportunity Tab

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

Sections in this chapter include:

- [Section 7.1, "Overview of the Opportunity Tab"](#)
- [Section 7.2, "Personalizing Opportunity Summary"](#)
- [Section 7.3, "Creating an Opportunity"](#)
- [Section 7.4, "Creating Rolling Opportunities"](#)
- [Section 7.5, "Maintaining Opportunity Detail"](#)
- [Section 7.6, "Personalizing a Table"](#)
- [Section 7.7, "Viewing Opportunity Line Subtotals"](#)
- [Section 7.8, "Searching for an Opportunity"](#)
- [Section 7.9, "Copying an Opportunity"](#)
- [Section 7.10, "Creating a Quote from an Opportunity"](#)
- [Section 7.11, "Creating a New Contact"](#)
- [Section 7.12, "Sales Teams"](#)
- [Section 7.13, "Adding a Classification"](#)
- [Section 7.14, "Linking an Opportunity to an Existing Lead"](#)
- [Section 7.15, "Adding a Key Competitor to an Existing Opportunity"](#)
- [Section 7.16, "Adding Decision Factors"](#)

- [Section 7.17, "Adding a Key Competitor While Creating an Opportunity"](#)
- [Section 7.18, "Adding a Competitor at the Purchase Item Level"](#)
- [Section 7.19, "Tracking Win/Loss Information"](#)
- [Section 7.20, "Adding Multiple Purchase Items with the Same Product Category"](#)
- [Section 7.21, "Viewing Opportunity History"](#)
- [Section 7.22, "Closing an Opportunity"](#)
- [Section 7.23, "Sales Credits"](#)
- [Section 7.24, "Adding an Existing Contact to an Opportunity"](#)
- [Section 7.25, "Notes"](#)
- [Section 7.26, "Tasks"](#)
- [Section 7.27, "Attachments"](#)
- [Section 7.28, "Opportunity Reports"](#)

## 7.1 Overview of the Opportunity Tab

Opportunities are pending sales that can be forecasted.

### Overview

An opportunity can be converted from a lead, or entered directly as a new opportunity. Once the opportunity is created, a sales representative tracks information about products that a customer is interested in purchasing.

Opportunity management is used to:

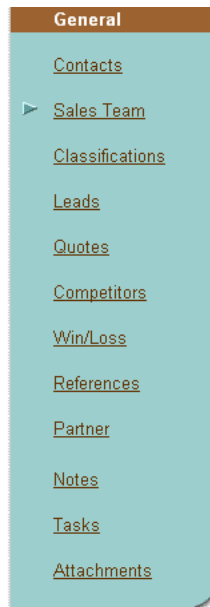
- Create, track, and manage opportunities using summary data including potential deal value, sales stage, win probability, and expected close date.
- Convert a lead to an opportunity and maintain information on the source of the lead.
- Attach additional information in the form of notes, tasks, and potential obstacles such as competitors.
- Generate quotes

The sales representative who creates the opportunity gains "full" access to the opportunity. Full access means that the sales representative who created the

opportunity can add other sales team members, assign sales credits, and estimate the likelihood that an opportunity will succeed. Additionally, sales representatives and their managers use this opportunity information to forecast sales under the Forecast tab.

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

The Opportunity tab consists of the following submenus:



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

### See Also

- [Section 14.3.17, "Win Probability"](#) for information on setting up win probabilities
- [Section 14.3.18, "Sales Stage"](#) for information on setting up sales stages
- [Section 14.3.19, "Status Code"](#) for information on setting up status codes
- [Section 14.3.20, "Sales Methodology"](#) for information on setting up sales methodologies

## 7.2 Personalizing Opportunity Summary

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

### Navigation

Opportunity > Personalize

### Prerequisites

None

### Steps

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

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

For information about security (which controls access to data), please refer to the *Oracle Sales Online Implementation Guide*, section "*Setting Up Users, Security, and Reporting Hierarchy*."

3. Change, add, or remove display options to indicate which columns you want displayed.

To select items to display, click the right arrow to move the items from Available Columns to Displayed Columns.

4. Change, add, or remove sort options to indicate how you want to sort the rows and in what order.

Also indicate the number of rows you want to display per page in the field provided.

5. Enter a Search Name.

6. Check the "Use as a Summary Page Default" box to use this search as your summary page default. This means that when you enter that particular tab, this search is displayed in the summary table, by default.
7. Click **Save** to store the query you have created OR click **Save and Apply Search** to save it and use it immediately.

### **Information About the "Include Account Manager Privilege" Box**

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

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

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

Note the following:

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

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

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

- The user is on the sales team
- Subordinates are on the sales team

## 7.3 Creating an Opportunity

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

### Navigation

Opportunity > Create Opportunity

### Prerequisites

None

### Related Profiles

**OSO: Use Product Category LOV:** Determines if a list of values or drop down menu will be used to select a product category on the opportunity detail or create pages. If set to "Yes", the application will use a list of values. If set to "No", the application will use a drop down list.

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

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

### See Also

[Section 7.3.1, "Quick Create"](#)

### Steps

Follow these steps to create a new opportunity:

1. Click **Create** or go to [Quick Create](#).

The Create Opportunity page opens.

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

[Customer Information](#)
[Progression](#)
[Additional Information](#)
[Purchase Items](#)
[Contacts](#)
[Notes](#)

## Create Opportunity

Enter the opportunity details and click "Create". Clicking on the "Clear" button will clear all the information that you have entered.

### Opportunity

\*Opportunity Name

Owner

The opportunity will be automatically assigned if the owner is not entered.

\*Currency  Budget

[Return To Top](#)

### Customer Information

Type in the partial or full customer name and click Go to select an existing customer from below.  
Or click on the "Create New Customer" link to create a new customer.

\*Customer    [Create New Customer](#)

Customer Address

[Return To Top](#)

### Progression

\*Status  \*Sales Stage

Methodology

\*Win Probability  Close Date

Defaulted to 150 days from today

[Return To Top](#)

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

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

b. **Click Go.**

The Select a Customer page opens with the search results.

c. Select a customer by clicking the customer link.

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

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

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

a. Select a Status from the drop down list.

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

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

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

e. Optionally, select the Close Date.

**Progression**

\*Status

\*Sales Stage

Methodology   

Close Date

\*Win Probability

Defaulted to 150 days from today

[Return To Top](#)

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

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

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

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

d. Optionally, find the Source of the opportunity.


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







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

- g. Optionally, related an Offer to the opportunity. Enter the offer name and click **Go**.
- 9. In the Purchase Items section, list the purchase items for this opportunity by selecting the products and specifying the amounts in the table. Click the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates.

**Purchase Items**

List the purchase items for this opportunity by selecting the products and specifying the amounts in the table below. Click on the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates.



Remove	*Product Category	Product	UOM	Qty	*Amount
	<input type="text"/> Go	<input type="text"/> Go 	<input type="text"/> Bag	<input type="text"/>	<input type="text"/>
	<input type="text"/> Go	<input type="text"/> Go 	<input type="text"/> Bag	<input type="text"/>	<input type="text"/>
	<input type="text"/> Go	<input type="text"/> Go 	<input type="text"/> Bag	<input type="text"/>	<input type="text"/>
<b>Total</b>					<input type="text"/>

\* Indicates required field to create a purchase item for this opportunity.


**Tip:** To use opportunity close date as the forecasting date select the **Use Close Date** checkbox.










[Return To Top](#)

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

**Contacts**

Type in the partial or full last name of the person and click "Go" to select an existing contact of this customer to be added as a contact to this opportunity. You can create new contacts by entering their information in the table below.

Add a Person   

Remove	Primary	Title	*Last Name	*First Name	*Relationship	Phone Book	Email Address Book
	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee Of	<input type="text"/> 	<input type="text"/> 
	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee Of	<input type="text"/> 	<input type="text"/> 
	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee Of	<input type="text"/> 	<input type="text"/> 

\* Indicates required field to add a contact to this opportunity.

[Return To Top](#)

**11. In the Notes section:**

- a. Choose the Type from the drop down list.
- b. Select the Status from the drop down list.
- c. Enter the text in the Text box.

**Notes**

Type  Status

Note

**Relate To**

Type  Name   Description

\* Indicates required field to create a note for this opportunity.

[Return To Top](#)

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

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

## 7.3.1 Quick Create

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

### Navigation

Opportunity > Quick Create

### Steps

1. Click **Quick Create**.

The Create Quick Opportunity page opens.

2. Enter an opportunity name, this value will be used throughout the application to select and view this opportunity.
3. Select a customer to associate this opportunity with by entering the customer name, click **Go**. Select from the search results.

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

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

## 7.4 Creating Rolling Opportunities

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

### Navigation

### Prerequisites

### Steps

Follow these steps to create rolling opportunity line items.

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

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

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

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

## 7.5 Maintaining Opportunity Detail

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

### Navigation

Opportunity > Opportunities

### Prerequisites

An opportunity must exist in order to update the details.

### Related Profiles

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

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

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

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#). Or to find an opportunity through one of your saved searches, select the search name from the drop down list, click **Go**.
2. Select the opportunity by clicking the opportunity link.

The opportunity detail page opens.

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

[Customer Information](#)   [Progression](#)   [Additional Information](#)   [Purchase Items](#)

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**Opportunity: Bluelight Accessories Jul 2001**

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**Opportunity**

\*Opportunity Name    Budget

Number **1414**   Transaction Amount **40,000.00 US Dollar**

Owner      User Amount **30,000.00 Pound Sterling**

[Return To Top](#)

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**Customer Information**

\*Customer [Bluelight.com](#)

Customer Address

Primary Contact [Jane Doe](#)   Contact Role **Not Identified.**

[Return To Top](#)

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**Progression**

\*Status    \*Sales Stage

Methodology [Product Oriented](#)   Close Date

\*Win Probability     Freeze

[Return To Top](#)

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

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

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

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

4. List the purchase items for this opportunity by selecting the products and specifying the amounts on the table below.
5. Click the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates.
6. Click the Split icon in "Sales Credits" column to assign sales credits for the selected line item. Please note, if the salesperson's association to the opportunity changes, the sales credit will also change. Hence, when you remove the salesperson from the organization, the sales credits associated with that salesperson must also be removed.

**Purchase Items**

List the purchase items for this opportunity by selecting the products and specifying the amounts on the table below. Click on the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates. Click on the split icon in "Sales Credits" column to assign sales credits for the selected line item.

Remove	*Product Category	Product	UOM	Qty	*Amount	Sales Credits	Competition
<input type="checkbox"/>	CRM/Sales <input type="button" value="Go"/>	100-OSO-1 <input type="button" value="Go"/>	Each	1	20,000.00		<a href="#">Edit</a>
<input type="checkbox"/>	CRM/Sales <input type="button" value="Go"/>	100-OSO-2 <input type="button" value="Go"/>	Each	1	10,000.00		<a href="#">Add</a>
<input type="checkbox"/>	Laptop <input type="button" value="Go"/>	QP-LPTR-U <input type="button" value="Go"/>	Each	1,000.0	10,000.00		<a href="#">Add</a>
	<input type="text"/> <input type="button" value="Go"/>	<input type="text"/> <input type="button" value="Go"/>	<input type="text"/>				
	<input type="text"/> <input type="button" value="Go"/>	<input type="text"/> <input type="button" value="Go"/>	<input type="text"/>				
	<input type="text"/> <input type="button" value="Go"/>	<input type="text"/> <input type="button" value="Go"/>	<input type="text"/>				
<b>Total</b>					<input type="text" value="40,000.00"/>		

\* Indicates required field to create a purchase item for this opportunity.

**Tip:** To use opportunity close date as the forecasting date select the **Use Close Date** checkbox.

**Purchase Items Summary**

Interest Type	Amount
CRM/Sales	80,000
Laptop	50,000
<b>Total</b>	<b>130,000</b>

[Return To Top](#)

**7. Click Update.**

**Related Profiles**

**OS: Privilege to Change Opportunity Owner**

There are two ways for an opportunity to change ownership:

- The specific owner of the opportunity goes into the application and selects another sales representative to own the opportunity and manually assigns to that person.
- A person with the profile "OS: Privilege to Change Opportunity Owner" set to "Yes", who has access to an opportunity, may go into the opportunity and change the owner to another member of the sales team, or another person from the sales organization that is in the system as a sales representative. If this profile is set to "No", the person can only change owner on opportunities that they own.

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

### **OS: Allow Updating Frozen Opportunities**

- Determines whether all users, including the opportunity owner, can update opportunities that have the Freeze box selected.
- This profile can be set at either the responsibility or the user level.
- When set to Yes, this profile option allows the user or responsibility to make changes. When set to No at the responsibility level, prevents all users from making modifications to an opportunity after the Freeze box is selected. This includes the Freeze box itself.

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

## **7.6 Personalizing a Table**

The tables provided for keeping track of entities such as purchase items and competitors are personalizable. The currently displayed columns are listed on the right and the available columns are listed on the left. To change the elements of the table, follow these steps.

### **Navigation**

Opportunity > Select an opportunity > Personalize icon

### **Prerequisites**

None

### **Steps**

1. To remove or add a column, highlight the desired item.
2. Click the right arrow or left arrow to move the item to achieve the desired outcome. For example, to remove "Competitors" from being displayed on the table, highlight "Competitors" and click the left arrow.
3. To personalize the order in which the rows appear, highlight the item and click the up or down arrow located to the right of the displayed column.
4. To personalize the sorting order, select from the available options.
5. Click **Apply** to apply your changes.

## 7.7 Viewing Opportunity Line Subtotals

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

### Navigation

Opportunity > Purchase Items

### Prerequisites

None

### Steps

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

### Related Profile Options

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

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

## 7.8 Searching for an Opportunity

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

### Navigation

Opportunity > Opportunities

### Prerequisites

An opportunity must exist.

### Steps

1. Search for the opportunity using [Chapter 3.2.1, "Using Quick Find or Advanced Search"](#).

2. Select the opportunity by clicking the opportunity link.
3. Alternatively, select one of your saved searches and click **Go**.
4. Select from the list of opportunities for which you have access from the summary page displayed.
5. Click the opportunity link to view details.

## 7.9 Copying an Opportunity

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

### Navigation

Opportunity > Opportunities

### Prerequisites

An opportunity must exist in order to make a copy.

### Steps

1. Search for the opportunity using [Chapter 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the opportunity by clicking the opportunity link.
3. Click **Copy**.  
The Copy Opportunity page opens.

## Copy Opportunity

\*Customer

Address

\*Opportunity Name

**Copy Attributes**

- Purchase Items
- Sales Team
- Sales Credits
- Competitors
- Opportunity Contacts
- Sales Methodology

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

When copying an opportunity, if you select just the purchase items parameter, the sales credits will also be copied, but all sales credits are assigned to you. However, if you select the purchase items and sales credits parameters at the same time, then the sales credits will be assigned in the same manner as they appear in the original opportunity.

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

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

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

## 7.10 Creating a Quote from an Opportunity

Provide your customer with quote information by creating a quote from an opportunity. This functionality is available if you have implemented Oracle Quoting. For more information about using quotes, please refer to the *Oracle Quoting User Guide*.

### Navigation

Opportunity > Opportunities

### Prerequisites

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

### Steps

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

The Create Quote page opens.

The opportunity details are populated into the create quote page.

4. Enter the required fields:
  - Quote name: the name by which you want to refer to the quote.
  - Expiration date: select the date by which the quote will expire.
  - Primary salesperson: find the primary salesperson responsible for this quote.

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

5. Optionally, enter the remaining fields.
6. Click **Apply**.

## 7.11 Creating a New Contact

Before creating a contact, check to make sure that this contact does not already exist in the database by performing a search.

### Navigation

Opportunity > Opportunities > Contacts

### Prerequisites

None

### Steps

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

## 7.12 Sales Teams

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

### See Also

- [Section 7.12.1, "Adding a Sales Team Member"](#)
- [Section 7.12.2, "Adding a Partner to a Sales Team"](#)
- [Section 7.12.3, "Adding a Resource Team to a Sales Team"](#)
- [Section 7.12.4, "Removing a Sales Team Member"](#)

### Overview

The Sales Team is divided into two sections:

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

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

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

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

- Sales Group
- Sales person
- Territory Location
- Roles

### Related Profiles

**OS: Always Put Customer Creator on Sales Team**

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

### **OS: Privilege to Change Opp Owner**

You can change the owner of an opportunity if one of the following conditions is met:

- If the profile is set to Yes
- If the user is the current owner of the opportunity
- Or, if the owner of the opportunity is the user's subordinate

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

## **7.12.1 Adding a Sales Team Member**

Follow these steps to add a sales team member:

### **Navigation**

Opportunity > Opportunities > Sales Team > Internal

### **Prerequisites**

None

### **Steps**

1. Search for the opportunity using [Chapter 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.
3. Click **Sales Team**.
4. Enter the last name or partial last name of the sales representative in the "Add a Salesperson" field, click **Go**.
5. If you are searching for a salesperson outside of your Business Unit, choose the Business Unit from the drop down list, click **Go**.
6. Select the salesperson. The salesperson will be added to the Sales Team summary table.

7. Enter the territory properties, and click **Go**.
8. Select a Role from the drop down list.
9. You can view the email address and phone number for this salesperson.
10. Click **Update**.

## 7.12.2 Adding a Partner to a Sales Team

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

### Navigation

Opportunity > Opportunities > Sales Team > External

### Prerequisites

None

### Steps

1. Search for the opportunity using [Chapter 3.2.1, "Using Quick Find or Advanced Search"](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail general page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

### Reference

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

## 7.12.3 Adding a Resource Team to a Sales Team

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

### Navigation

Opportunity > Opportunities > Sales Team > Internal

### Prerequisites

None

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.
3. Click **Sales Team**.
4. In the Add a Resource field, enter the resource name using percent sign (%) as a wildcard, click **Go**.
5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

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

## 7.12.4 Removing a Sales Team Member

Follow these steps to remove a sales team member:

### Navigation

Opportunity > Opportunities > Sales Team > Internal

### Prerequisites

A sales team member must exist on the sales team.

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.

3. Click **Sales Team**.
4. Locate the salesperson on the summary table and check the Remove box.
5. Click **Update**.

## 7.13 Adding a Classification

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

### Navigation

Opportunity > Select an Opportunity > Classification

### Prerequisites

None

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.
3. Select **Classification**.
4. Select a Classification from the drop down list that best describes your opportunity.
5. Optionally, enter comments.
6. Click **Update**.

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

## 7.14 Linking an Opportunity to an Existing Lead

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

### Navigation

Opportunity > Select an opportunity > Leads

### Prerequisites

None

### Related Profiles

#### OS: Linking Opportunity to Lead

There are three settings for this profile:

- Allow with prompt  
If selected, allows you to create a link to a lead either through the "Create Opportunity" function or through the Leads link on the Opportunity detail page. For the "Create Opportunity" function, after creating an opportunity, the opportunity is displayed on the detail page. A prompt appears that allows you to link to an existing lead (this is optional). Please note, if no leads exist, this prompt will not be displayed even if this setting is selected.
- Allowed  
If selected, allows you to create a link to a lead through the Leads link on the Opportunity detail page.
- Not allowed  
If selected, does not allow users to create links to leads.

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

### Steps

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

The Link Opportunity to Lead page opens.

5. Select the Lead, or Leads, with which you want this opportunity linked by checking the Select box.
6. Click **Link to Lead(s)**.

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

## 7.15 Adding a Key Competitor to an Existing Opportunity

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

### Prerequisites

Oracle Marketing must be installed to use this feature.

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

### Related Profiles

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

### Navigation in Oracle Sales Online

Opportunity > Opportunity

### Steps

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

The Opportunity Detail page opens.

Since you are adding a key competitor to an existing opportunity, the opportunity detail page will have existing information. You can add additional information to the detail page while you add the key competitor information.

3. Use the Key Competitor drop down list to select a key competitor. This information comes from Oracle Marketing. If competitor products have not been established in Oracle Marketing, no data will appear in the drop down list.
4. Click **Update**.

## 7.16 Adding Decision Factors

### Navigation

Opportunity > Opportunities

### Steps

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

## 7.17 Adding a Key Competitor While Creating an Opportunity

### Navigation

Opportunity > Opportunities

### Prerequisites

Oracle Marketing must be installed to use this feature.

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

### Steps

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

1. Click **Create**.

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

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

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

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

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

3. Click **Create**.

## 7.18 Adding a Competitor at the Purchase Item Level

### Navigation

Opportunity > Opportunities

### Prerequisites

Oracle Marketing must be installed to use this feature.

### Steps for Alternative 1

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

1. Select an existing opportunity from the opportunity summary page, or use [Using Quick Find or Advanced Search](#).

2. Select the opportunity by clicking the opportunity link.

The Opportunity Detail page opens.

3. Click **Competitors**.

The competitors that you enter from these pages are related to the purchase line that you indicate. This competitor can be, but is not necessarily the key competitor.

4. Click **Add Competitors**.

5. Select the related purchase items that you want to add from the Purchase Items drop down list.

6. Select the competitor from the drop down list.

7. Select the competitor product from the drop down list. These products were specifically set up to be associated with this competitor.
8. A box is provided so that you can indicate if this is a key competitor. If you check this box, the opportunity detail page will automatically be updated with the new information.
9. Click **Add**.

### **Steps for Alternative 2**

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

1. Select an existing opportunity from the opportunity summary page, or use [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.
3. In the Purchase Item summary table, click **Edit** in the Competitor column.
4. Enter competitor products and decision factors.
5. Click **Update**.

## **7.19 Tracking Win/Loss Information**

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

### **Navigation**

Opportunity > Opportunities > Win/Loss

### **Prerequisites**

None

### **Steps**

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.

3. Click **Win/Loss**.

The Win/Loss page opens.

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

5. Optionally, select a Close Reason from the drop down list.

6. Optionally, enter a Close Comment in the field.

7. Optionally, enter Competitor Products, Decision Factors, Other Issues, and Reseller Information.

8. Click **Update**.

After changing the win/loss indicator, the system administrator must run a complete refresh of as\_sales\_credit\_denorm in order to see the changes.

## 7.20 Adding Multiple Purchase Items with the Same Product Category

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

### Navigation

Opportunity > Opportunities

### Prerequisites

None

### Steps

Follow these steps to add a purchase item:

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).

2. Select the opportunity by clicking the opportunity link.

3. Click **Add Purchase Items**.

The Opportunity Add Purchase Item page opens.

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

5. Select an Inventory Item by entering a partial name, use the percent sign (%) as a wildcard, and click **Go**.

6. Enter the Quantity and Unit of Measure (UOM).
7. Enter the Amount, it is a required field.
8. Select a Campaign by entering a partial name, use the percent sign (%) as a wild card, and click **Go**.
9. Enter the number of Purchase lines that you want to split your purchase lines into.
10. In the Forecast Date Intervals section, select a Start Date by clicking the Calendar icon and selecting a date.
11. Enter the number of days that you want between each purchase item line. For example, every 30 days equals once a month.
12. Click **Add** to create multiple purchase lines with forecast dates in above mentioned intervals.

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

## 7.21 Viewing Opportunity History

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

## 7.22 Closing an Opportunity

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

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

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

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

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

Follow these steps to close an opportunity.

## **Navigation**

Opportunity > Opportunity

## **Prerequisites**

An opportunity must exist.

## **Steps**

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

## 7.23 Sales Credits

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

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

- [Section 7.23.1, "Maintaining Sales Credits"](#)
- [Section 7.23.2, "Adding a Salesperson to Receive Sales Credits"](#)
- [Section 7.23.3, "Adding a Partner to Receive Sales Credits"](#)

### 7.23.1 Maintaining Sales Credits

Follow these steps to split sales credits:

#### Navigation

Opportunity > Opportunities > Split

#### Prerequisites

None

#### Steps

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

## 7.23.2 Adding a Salesperson to Receive Sales Credits

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

### Navigation

Opportunity > Opportunities > Split

### Prerequisites

None

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.
3. From the Purchase Items table, under the Amount column, click **Split**.
4. In the Add a Salesperson field, enter the last name of the salesperson, and click **Go**.
5. Select an employee by clicking the employee name link.  
To search for an employee outside your business group, select the business group from the drop down list, click **Go**.
6. Enter credit amount (forecast or other).

## 7.23.3 Adding a Partner to Receive Sales Credits

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

### Navigation

Opportunity > Opportunities > Split

### Prerequisites

None

### Steps

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

4. In the Add a Partner field, enter the name of the partner, and click **Go**.
5. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a "sales" partner.
6. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop down list and click **Update**.

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

## 7.24 Adding an Existing Contact to an Opportunity

Follow these steps to add an existing contact:

### Navigation

Opportunity > Opportunities > Contacts

### Prerequisites

A contact must exist.

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.

3. Click **Contacts**.

4. Enter the last name in the Add a Person field to search for a contact, click **Go**.

It is recommended that you search by last name only. This will search for people which have already established a relationship with this customer called contacts.

5. From the Select a Person page, choose from the list of search results by clicking the relationship link.

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

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

## 7.25 Notes

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

- [Section 7.25.1, "Creating Notes"](#)
- [Section 7.25.2, "Viewing Notes"](#)

### 7.25.1 Creating Notes

Follow these steps to create a note:

#### Navigation

Opportunity > Opportunities > Notes

#### Prerequisites

None

#### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.
3. Click **Notes**.
4. Select a Type from the drop down list.  
You can change the default type using Profiles.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the Text box.
7. Click **Create**.

**Note:** You cannot edit notes once they are created.

### 7.25.2 Viewing Notes

Follow these steps to view a note:

## Navigation

Opportunity > Opportunities > Notes

## Prerequisites

A note must exist.

## Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The **Opportunity Detail** page opens.
3. Click the **Notes** link.
4. Select a Type from the drop down list.  
The default type can be changed using Profiles.
5. Choose the number of days for which you want the notes history.
6. Click **Apply**.
7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
8. To view all notes in a printer-friendly format, click **All Notes**.

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

## 7.26 Tasks

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

- [Section 7.26.1, "Creating a Task"](#)
- [Section 7.26.2, "Adding an Attachment to a Task"](#)
- [Section 7.26.3, "Maintaining a Task"](#)

### 7.26.1 Creating a Task

#### Navigation

Opportunity > Opportunities > Tasks

#### Prerequisites

None

#### Steps

Follow these steps to create a task:

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.
3. Click **Tasks**.
4. Click **Create**.
5. Select **Task Type** from the drop down list.
6. If the task is a private task, select the "**Private**" box. You can assign this task to yourself only.
7. Enter the **Task Name**.
8. Enter the **Task Description**.
9. Choose the **Priority** from the drop down list.
10. Select the **Status** from the drop down list.

11. Select a planned start date by clicking the Calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the person you are assigning to the task; click **Go**.
14. The "**Relate to**" field is defaulted to the opportunity with which you are working, however, you can edit this field.
15. Click **Create**.

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

## 7.26.2 Adding an Attachment to a Task

### Navigation

Opportunity > Opportunities > Tasks

### Prerequisites

A task must exist.

### Steps

Follow these steps to add an attachment to your task:

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.
3. Click **Attachments**.
4. Click **Add**.  
The **Add Attachment** page opens.
5. Enter a description, and choose a **Text**, **File**, or **URL** attachment.
6. On your desktop, click **Browse** to search for a file to attach.
7. Click **Create**.

## 7.26.3 Maintaining a Task

Follow these steps to maintain a task:

### Navigation

Opportunity > Opportunities > Tasks

### Prerequisites

A task must exist.

### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.  
The Opportunity Detail page opens.
3. Click **Tasks**.
4. Add or update information.
5. Click **Update**.

## 7.27 Attachments

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

- [Section 7.27.1, "Adding an Attachment"](#)
- [Section 7.27.2, "Viewing an Existing Attachment"](#)

### 7.27.1 Adding an Attachment

#### Navigation

Opportunity > Opportunities > Attachments

#### Prerequisites

None

#### Steps

1. Search for the opportunity using [Using Quick Find or Advanced Search](#).
2. Select the opportunity by clicking the opportunity link.

The Opportunity Detail page opens.

3. Click **Attachments**.
4. Click **Add**.

The Add Attachment page opens.

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

## 7.27.2 Viewing an Existing Attachment

### Navigation

Opportunity > Opportunities > Attachments

### Prerequisites

An attachment must exist.

### Steps

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

## 7.28 Opportunity Reports

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

- [Section 7.28.1, "Viewing Opportunity Summary Report"](#)
- [Section 7.28.2, "Viewing Opportunity Summary Report by Group"](#)
- [Section 7.28.3, "Viewing Opportunity Detail Report"](#)
- [Section 7.28.4, "Viewing Opportunity Access Report"](#)
- [Section 7.28.5, "Viewing Opportunity Progression Dashboard"](#)
- [Section 7.28.6, "Viewing Opportunity Classification Report"](#)
- [Section 7.28.7, "Viewing Opportunity Aging Report"](#)
- [Section 7.28.8, "Viewing Opportunity Aging by Status Report"](#)

### Downloading Reports

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

### Partner Information

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

### Setup Information

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

### 7.28.1 Viewing Opportunity Summary Report

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

### Navigation

Opportunity > Reports > Opportunity Summary Report

### Prerequisites

None

### Steps

Follow these steps to view the Opportunity Summary report:

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

---

---

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

---

---

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

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

In the Save Report section, click:

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

## 7.28.2 Viewing Opportunity Summary Report by Group

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

### Navigation

Opportunity > Reports > Opportunity Summary Report by Group

### Prerequisites

None

### Steps

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

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

In the Save Report section, click:

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

### 7.28.3 Viewing Opportunity Detail Report

This report provides a detailed listing of the selected opportunities.

#### Navigation

Opportunity > Reports > Opportunity Detail Report

#### Prerequisites

None

### Steps

Follow these steps to view the Opportunity Detail report:

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

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

In the Save Report section, click:

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

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

## 7.28.4 Viewing Opportunity Access Report

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

### Navigation

Opportunity > Reports > Opportunity Access Report

### Prerequisites

None

### Steps

Follow these steps to view the Opportunity Access report:

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

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

In the Save Report section, click:

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

## 7.28.5 Viewing Opportunity Progression Dashboard

The purpose of the progression dashboard is to provide a tool for you to track the completion of predefined tasks for opportunities following a particular sales methodology. The situations in which the progression dashboard does not show data are listed below. These assumptions were made to improve query performance and because you can use the opportunity summary report if you want a complete list of opportunities.

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

### Navigation

Opportunity > Reports > Opportunity Progression Dashboard

### Prerequisites

None

### Steps

Follow these steps to view the Opportunity Progression report:

1. Click the **Opportunity Progression Report** link.  
The Opportunity Progression Dashboard opens.
2. Select filters.
3. Select display options.

In the Save Report section, click:

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

3. **Run Report:** to run the report without saving the report.
4. Select either the radio button for "Always using the current period" or "Always run using the indicated period."
4. Check the "Use as Report Default" box to use the report as a default.

### 7.28.6 Viewing Opportunity Classification Report

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

#### Navigation

Opportunity > Reports > Opportunity Classification Report

#### Prerequisites

None

#### Steps

Follow these steps to view the Opportunity Classification report:

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

In the Save Report section, click:

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

### 7.28.7 Viewing Opportunity Aging Report

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

### Navigation

Opportunity > Reports > Opportunity Aging Report

### Prerequisites

None

### Steps

Follow these steps to view the Opportunity Aging report:

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

In the Save Report section, click:

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

## 7.28.8 Viewing Opportunity Aging by Status Report

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

### Navigation

Opportunity > Reports > Opportunity Aging by Status Report

### Prerequisites

None

### Steps

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

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

2. Select filters.
3. Select display options.

In the Save Report section, click:

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

## 7.28.9 Viewing Opportunity by Product Report

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

### Navigation

Opportunity > Reports > Opportunity by Product Report

### Prerequisites

None

### Steps

Follow these steps to view the report:

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

In the Save Report section, click:

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

4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.
4. Check the "Use as Report Default" box to use the report as a default.

## 7.28.10 Viewing My Reports and Charts

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

You can view the following charts:

- [Section 7.28.11, "Viewing Opportunity Chart by Close Date"](#)
- [Section 7.28.12, "Viewing Opportunity Chart by Status"](#)
- [Section 7.28.13, "Viewing Opportunity Chart by Win Probability"](#)

## 7.28.11 Viewing Opportunity Chart by Close Date

### Navigation

Opportunity > Reports

### Prerequisites

None

### Steps

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

1. In the Charts section, click the Opportunity Chart by Close Date link.
2. Select the period name from the drop down list.
3. Select the start period from the drop down list.
4. Select the end period from the drop down list.
5. Select the value type from the drop down list.
6. Click **Save**.

## 7.28.12 Viewing Opportunity Chart by Status

### Navigation

Opportunity > Reports

### Prerequisites

None

### Steps

To view opportunity chart by status, follow these steps:

1. In the Charts section, click the Opportunity Chart by Status link.
2. Select the period name from the drop down list.
3. Select the start period from the drop down list
4. Select the end period from the drop down list.
5. Select the value type from the drop down list.
6. Click **Save**.

## 7.28.13 Viewing Opportunity Chart by Win Probability

### Navigation

Opportunity > Reports

### Prerequisites

None

### Steps

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

1. In the Charts section, click the Opportunity Chart by Win Probability link.
2. Select the period name from the drop down list.
3. Select the start period from the drop down list.
4. Select the end period from the drop down list.
5. Select the value type from the drop down list.

**6. Click Save.**



Sections in this chapter include:

- [Section 8.1, "Overview of the Quote Tab"](#)
- [Section 8.2, "Creating Quotes"](#)

## 8.1 Overview of the Quote Tab

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

Some of the functions available are:

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

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

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

Sales representatives add trade-in items to a quote by performing a product search for the items, adding the items to the quote, and marking their line type as a Line Category of Return. When the application calculates the order total, it treats the prices of trade-in items as credits, and subtracts them from the order total.

- **Pricing Agreements:** When creating a quote, you can select a pricing agreement. The Quote Detail-Pricing Agreements page displays all pricing agreements specific to the sold-to customer and all universal pricing agreements. You can choose which pricing agreement to apply when pricing a quote.
- **Processing a Quote to an Order:** Entering shipping details is the first step of transforming a quote into an order. When you choose a ship-to customer, you can choose either from a list of all existing customers or from a list of only those customers who have a shipping relationship with the sold-to customer, depending on your permissions.

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

### **Related Profiles**

**OSO: Enable Quotes**

**ASO: Enable OSO Integration**

**MO: Operating Unit (optional)**

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

### **Reference**

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

## 8.2 Creating Quotes

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

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

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

### **Creating a Quote from an Opportunity**

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

### **Creating a Standalone Quote**

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

### **Reference**

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



Sections in this chapter include:

- [Section 9.1, "Overview of the Forecast Tab"](#)
- [Section 9.2, "Creating and Submitting Forecasts"](#)
- [Section 9.3, "Automatically Submitting Worksheets"](#)
- [Section 9.4, "Viewing Forecast History"](#)
- [Section 9.5, "Adding an Attachment"](#)
- [Section 9.6, "Adding a Note"](#)
- [Section 9.7, "Linking to Compensation"](#)
- [Section 9.8, "Opportunity Worksheet"](#)
- [Section 9.9, "Personalizing Opportunity Worksheet Table"](#)
- [Section 9.10, "Forecast Threshold Overview"](#)
- [Section 9.11, "Product Category Worksheet"](#)
- [Section 9.12, "Viewing Product Category History"](#)
- [Section 9.13, "Viewing Opportunity History"](#)
- [Section 9.14, "Quick Forecast"](#)
- [Section 9.15, "Forecast Reports"](#)

## 9.1 Overview of the Forecast Tab

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

### Overview

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

### Worksheets

Forecasting is performed at two levels: opportunity and product category.

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

**Product Category:** Forecasting at product category level provides sales representatives 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.

### Views

Roles play an important part in forecasting functions. For instance, in viewing forecasts, a manager can view the forecasts for the subordinates but a sales representative cannot view any other forecasts besides his or her own. The Administrator role does not allow for subordinates; only the Manager role does, therefore if you are logged in with an administrator role, you will not be able to view subordinates forecasts.

### Example

If you are submitting a forecast and you have a salesperson role and an administrator role, the application will default you to salesperson because the administrator role cannot submit a forecast.

Also, if you are submitting a forecast and you have a salesperson role and a manager role, the application will default you to manager. If you are running a forecast report, by default, the Worksheet Type defaults to your manager view rather than your subordinate view.

## Pipeline Defaults

Forecasting uses the sales credits on each opportunity line to determine the pipeline numbers for a particular forecast period.

Pipeline values reflect the following:

- Opportunities that have a status that is classified as forecastable.
- The total forecast credit amount of the opportunities assigned to the sales representative or within the hierarchy of the manager.
- Pipeline = Forecastable opportunity amounts
- Weighted Pipeline = Opportunity amounts multiplied by the win probability
- Won to Date = Opportunity amounts where status is set to "Won"

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

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

Pipeline defaults use the following criteria:

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

## Win Probability Based Defaults

An example:

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

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

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

Win probability 60-79:

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

Win probability 40-59:

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

Win probability 0-39:

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

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

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

### **Prerequisites**

To use the forecasting functionality, the following setups are prerequisites.

- Sales Resource Hierarchy should be set up. Refer to the *Oracle Sales Online Implementation Guide* section on "Setting up Users, Employees, and Resources".
- Forecast calendar must be set up. Refer to the *Oracle Sales Online Implementation Guide*.
- Opportunity management should be set up. Refer to the *Oracle Sales Online Implementation Guide*.
- If you are using multiple currencies for global deployment, currency set up must be complete. Refer to the *Oracle Sales Online Implementation Guide*.

### **See Also**

[Section 3.5.5, "Setting Forecast Profiles"](#)

## 9.2 Creating and Submitting Forecasts

### Navigation

Forecast > Forecast

### Prerequisites

None

### Steps

Follow these steps to create and submit Forecasts:

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

---

---

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

---

---

## 9.3 Automatically Submitting Worksheets

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

### Navigation

Profiles > Sales Online Preferences > Forecasting

### Prerequisites

You must set profile preferences.

### Steps

Follow these steps to set up automatic submission of worksheets:

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

The following table describes the Auto Submit Profiles.

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

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

## 9.4 Viewing Forecast History

### Navigation

Forecast > View Forecast History

### Prerequisite

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

### Steps

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

## 9.5 Adding an Attachment

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

### Navigation

Forecast > Forecast > Attachments

### Prerequisite

A forecast must already exist.

### Steps

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

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

The Add Attachment page opens.

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

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

## 9.6 Adding a Note

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

### Navigation

Forecast > Forecast > Notes

### Prerequisites

A forecast must already exist.

### Steps

Follow these steps to add a note:

1. Select an existing forecast.
2. Click **Notes**.
3. Select a **Type** from the drop down list.  
You can change the default type by changing the forecasting profile preferences.
4. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
5. Enter your notes in the text box.
6. Click **Create**.

Forecast Notes are submitted to management along with forecast numbers.

**Note:** You cannot edit notes once they are created.

## 9.7 Linking to Compensation

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

### Navigation

Forecast > Compensation

### Prerequisites

Oracle Incentive Compensation must be installed to use this feature.

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

### Steps

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

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

## 9.8 Opportunity Worksheet

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

- [Section 9.8.1, "Creating Opportunity Level Forecasts Using Opportunity Worksheets"](#)

### See Also

- [Section 9.9, "Personalizing Opportunity Worksheet Table"](#)
- [Section 9.11.1, "Creating Product Level Forecasts Using Product Category Worksheets"](#)

### 9.8.1 Creating Opportunity Level Forecasts Using Opportunity Worksheets

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

### Navigation

Forecast > Opportunity

### Prerequisites

None

### Steps

Follow these steps to create opportunity worksheets:

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

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

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

If you have set up the Forecast profile, "Default New Rows in Worksheet" equal to Pipeline. See [Pipeline Defaults](#) on page 9-3.

**Subordinate Submitted Values:** This includes values submitted by Subordinates. If there are no "current" subordinate submitted values, the values will default to zero." If thresholds are used by a subordinate, this value will always default to zero.

Please note, only managers are allowed to create worksheets using subordinate submitted values.

**6. Click **Apply**.**

The page is refreshed with all the opportunities within your pipeline which are forecastable.

The values in the worst case, forecast, and best case fields reflect the radio button value that you selected.

You can adjust the amounts in these fields to reflect your sales commitment.

**7. Click **Save**.**

The forecast will not be submitted by saving the worksheet, you must click the Submit Forecast and Worksheets button in the Forecast Main page.

### **Related Profiles**

#### **"OS: Allow Opportunity Forecast by Product Category"**

If set to Yes, opportunities will display on the worksheet with the product categories that make up the opportunity by default. If set to No, the opportunity worksheet will not show the product category levels of the opportunity.

## 9.9 Personalizing Opportunity Worksheet Table

### Navigation

Forecast > Opportunity > Personalize Icon

### Prerequisites

None

### Steps

Use the following parameters to define the criteria for forecasting opportunity lines individually. The remaining opportunities will be aggregated as a threshold line.


### Opportunity Worksheet Table Personalization


Apply Restore Cancel

#### Threshold Criteria


Use the following parameters to define the criteria for forecasting opportunity lines individually. The remaining opportunities will be aggregated as a threshold line.

Opportunity Amount >  (USD) Win Probability Range  to

Opportunity Last Update since  

Channel    
 All  
 Commercial  
 Commercial(Upgraded)  
 Direct

Stage    
 All  
 QQQQ  
 STAGE 1  
 STAGE 2

Status    
 All  
 Forecast  
 Preliminary  
 Upside

#### Flexfields

Customer Rating

Exempt Codes

Order Date  

1. Select parameters.

If "All" is selected for the columns, it means that there is no filter applied and footnotes will not appear for columns unless you specifically indicate some value.

2. Select display options.

If Product Category level forecasting is enabled, the following columns are not included in sort options:

- Close Date
  - Stage
  - Status
  - Opportunity Amount
  - Win Probability
  - Weighted Amount
3. Select the order in which to display data.
  4. Enter the number of rows to be displayed per page.
  5. Click **Apply**.

## 9.10 Forecast Threshold Overview

Before creating opportunity worksheets you can set up a forecast threshold to simplify your data input. A forecast threshold is a currency amount defined in your profile preferences that establishes a value, and any forecast equal to or below that value will be rolled up into a lump sum. This saves sales representatives and managers valuable time entering forecast data for opportunities below a certain value, the forecast threshold. This applies to opportunity worksheets only and this feature is optional.

Thresholds are amounts and are used along with your forecast currency. Changing your currency does not convert the threshold. If you change your currency for forecasting, you must set the threshold amount accordingly.

A basic example:

Sales Representative "A" has set her forecast threshold at \$4,000.00 and forecasted five opportunities with the following amounts:

Opportunity #1 = \$10,000.00

Opportunity #2 = \$ 5,000.00

Opportunity #3 = \$ 4,000.00

Opportunity #4 = \$ 2,000.00

Opportunity #5 = \$ 1,000.00

Since the threshold amount is set to \$4,000.00, the three opportunity amounts equal to or lesser than the threshold amount (3, 4, and 5) are rolled up and displayed on the worksheet in a lump sum. The opportunity worksheet would display the following three rows:

Opportunity #1 = \$10,000.00

Opportunity #2 = \$ 5,000.00

Opportunities Below Threshold = \$ 7,000.00 (opportunities equal to or below the threshold combined 3, 4, and 5)

Please note, "blank" threshold value means the threshold feature is not being used. A "0" threshold value indicates the threshold feature is being used and opportunities with negative amounts will fall within the threshold line calculation. In other words, 0 is a valid threshold value since you can have opportunities with negative amounts. If you enter a negative amount in the threshold line, the forecast credit is not split for the won opportunity under the threshold line.

## Prerequisites

If you choose to use this feature, set the following profiles:

- Set "OSO: Opportunity Worksheet Threshold Amount." For example, enter amount > 10,000. The threshold line is calculated using all opportunities which are <= 10,000.
  1. Click the **Profile** icon.
  2. Click the **Forecast** link.
  3. Enter the amount you want to include as your forecast threshold in the "Opportunity Worksheet Threshold Amount" field.
  4. Click **Update**.
- Set by the System Administrator (optional):

"OSO: Store Opportunities After Aggregation Due to Forecast Threshold" to specify whether the individual lines of the threshold should be stored in opportunity worksheet lines. You will only need to update this profile if you decide not to store the opportunities. This profile does not have to be set up if you determine that you want to store the opportunities. The default is "Yes."

This profile option must be set up by a system administrator. Please refer to the *Oracle Sales Online Implementation Guide, Release Notes for 11.5.7* for further instruction.

## See Also

- [Section 9.10.1, "Defining Your Forecast Threshold"](#)
- [Section 9.10.2, "Viewing Opportunities Included in the Forecast"](#)
- [Section 9.10.3, "Viewing Threshold History"](#)
- [Section 9.10.4, "Viewing Subordinate's Threshold Details"](#)

## 9.10.1 Defining Your Forecast Threshold

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

The available parameters:

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

If you choose to use this feature, define the forecast threshold by setting the appropriate profiles.

### Prerequisites

Set the profile "OSO: Store Opportunities After Aggregation Due to Forecast Threshold" to specify whether the individual lines of the threshold should be stored in opportunity worksheet lines. You only need to update this profile if you decide not to store the opportunities. This profile does not have to be changed if you want to store the opportunities. The default is "Yes."

If set to "Yes", click the link "Opportunities Below Threshold" to view a listing of all opportunities which fall below the threshold criteria that is established. If set to "No", then the link is not available but you can still submit forecast for the threshold line.

### Steps

1. Click **Profile**.
2. Click **Forecast**.
3. Enter the amount you want to include as your forecast threshold in the "Opportunity Worksheet Threshold Amount" field.
  - A positive value in this field means threshold is turned on and will sum all rows with this amount or lower into one summary line.
  - A null value assumes the feature is not being used and the application works as is, without a threshold set.
  - A zero value is treated as a threshold value and will sum all rows with a zero or negative value into one summary line.
4. Click **Update**.

The result of setting a forecast threshold is that all opportunities that fall within a forecast category, for a forecast period, for a specific credit type within the threshold are summarized in one line on the opportunity worksheet.

### 9.10.2 Viewing Opportunities Included in the Forecast

You can view all the opportunities summarized in an opportunity line by clicking the opportunity link. This link takes you to the details of the opportunities that are equal to or below the forecast threshold that you have established.

#### Prerequisites

This link is active only if the profile "OSO: Store Opportunities After Aggregation Due to Forecast Threshold" is set to "Yes", the default. If you are not using this feature, the link is turned off. However, you can still forecast for this aggregate line.

#### Navigation

Forecast > Opportunity > Apply > Opportunities below Threshold

#### Steps

Click the opportunities below the threshold number link in the opportunity column of the threshold line.

---

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**Note:** If you save and submit an opportunity worksheet using a threshold value, and then change the threshold value, the threshold row is flagged with an indicator and the message "The Threshold Amount has changed since the last submission" appears.

---

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### 9.10.3 Viewing Threshold History

You can view the history of submitted threshold rows.

#### Prerequisites

A forecast threshold and history must exist.

#### Navigation

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View

### **Steps**

Click the History View button on the threshold line in the opportunity worksheet to display the history of submitted threshold rows.

## **9.10.4 Viewing Subordinate's Threshold Details**

If you are a manager, you can view your subordinates forecast threshold details.

### **Prerequisites**

You must be logged in as a manager.

### **Navigation**

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View Subordinates Submitted Threshold Lines

### **Steps**

Click the "View Subordinates Submitted Threshold Lines" link at the bottom of the page.

You will see a read-only page with opportunity details for your subordinates.

## 9.11 Product Category Worksheet

Product Category Worksheet is a tool to view your pipeline aggregated into product categories and prepare product level forecasts.

- [Section 9.11.1, "Creating Product Level Forecasts Using Product Category Worksheets"](#)

### 9.11.1 Creating Product Level Forecasts Using Product Category Worksheets

#### Navigation

Forecast > Product Category

#### Prerequisites

None

#### Steps

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

Update Best Case, Forecast, and Worst Case amounts and click "Save." The values you save on this page will appear under the Forecast subtab to assist you in creating your forecast. Percentage is not calculated if using subordinate submitted values to create a worksheet.

1. From the drop down list select the Sales Group for which you want to forecast.
2. Select the Period Type and Period Name from the drop down lists.
3. Select the Forecast Category from the drop down list.
4. Select the Credit Type.
5. Click **Apply**.
6. Update Best Case, Forecast, and Worst Case amounts.
7. Click **Save** to save your worksheet.

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

## 9.12 Viewing Product Category History

### Overview

Product Category history has added filters to view these pages. In previous releases, the history showed you a list of all previously submitted forecasts for all users for a particular product category or opportunity. All records were visible to all sales representatives regardless of sales group structure, forecast period, forecast category, or credit type.

The following filters are used for the Product Category History page:

For a Subordinate:

- Sales Group
- Sales Person
- Period
- Forecast Category
- Credit Type
- Product Category

For a Manager:

- Sales Group
- Period
- Forecast Category
- Credit Type
- Product Category

Additionally, the manager view includes forecast submissions for all sales representatives reporting to the manager.

### Navigation

Forecast > Product Category

### Prerequisites

Previous product category forecasts must have been submitted.

### Steps

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

1. Click **Product Category Worksheet**.
2. Click **History**, to view the history of all previous forecast submissions for this product category.

Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted.

## 9.13 Viewing Opportunity History

### Overview

Opportunity history has added filters to view these pages. In previous releases, the history showed you a list of all previously submitted forecasts for all users for a particular product category or opportunity. All records were visible to all sales representatives regardless of sales group structure, forecast period, forecast category, or credit type.

The following filters are used for the Opportunity History page:

For a Subordinate:

- Sales Group
- Sales Person
- Period
- Forecast Category
- Credit Type
- Opportunity

For a Manager:

- Sales Group
- Period
- Forecast Category
- Credit Type
- Opportunity

Additionally, the manager view includes forecast submissions for all sales representatives reporting to the manager.

### **Navigation**

Forecast > Opportunity

### **Prerequisites**

Previous opportunity forecasts must have been submitted.

### **Steps**

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

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

## **9.14 Quick Forecast**

Under the Forecast tab, you will find the Quick Forecast subtab. Sales representatives can generate forecasts for multiple periods directly from the pipeline. The forecast profile options control whether the opportunity or product category worksheet is created, or both are created. The goal of this feature is to reduce the time it takes to create and submit the forecast.

Please note, resources that have been assigned a manager role in a group will not be able to use this feature. If assigned a manager role, you will receive the following error message when you click the Generate Forecast subtab: "*You do not have access to generate forecast.*" However, this does not mean that a manager cannot submit forecasts, only that they cannot use the quick forecast feature.

### **Navigation**

Forecast > Quick Forecast

### **Prerequisites**

See the *Oracle Sales Online Implementation Guide* for information about profiles:

- OSO: Forecast Max Generate Months.
- OSO: Default Worksheet Values
- OSO: Auto Submit Worksheets

**Steps**

Follow these steps:

The Generate Forecast for Multiple Periods page opens.

1. From the **Sales Group** section, select a sales group from the drop down list.
2. From the Forecast section, select the **Period Type** from the drop down list.
3. Select the "**From Period**" and "**To Period**" from the drop down lists.
4. Select the **Category** from the drop down list.
5. Select the **Credit Type** from the drop down list.
6. Click **View**.

## 9.15 Forecast Reports

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

- [Section 9.15.1, "Viewing Forecast History Report"](#)
- [Section 9.15.2, "Viewing Forecast Comparison Report"](#)
- [Section 9.15.3, "Viewing Forecast Summary Report by Product Category"](#)
- [Section 9.15.4, "Viewing Forecast Accuracy Report"](#)
- [Section 9.15.5, "Viewing Forecast to Pipeline Summary Report"](#)
- [Section 9.15.6, "Viewing Forecast Summary Report"](#)
- [Section 9.15.7, "Viewing Forecast Progression Report"](#)
- [Section 9.15.8, "Creating a Report"](#)
- [Section 9.15.9, "Viewing Forecast History \(Self\) Chart"](#)
- [Section 9.15.10, "Viewing Forecast History \(Subordinates\) Chart"](#)

### 9.15.1 Viewing Forecast History Report

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

#### Navigation

Forecast > Reports > Forecast History Report

#### Prerequisites

None

#### Steps

Follow these steps to view the Forecast History Report:

### Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the "Period" from the drop down list, then select "To" from the drop down list.
3. Select from the Forecast Category drop down list.
4. Select the Sales Group from the drop down list.
5. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking **Go**.
6. Select a Credit Type from the drop down list.

### Display Options

7. Select the Reporting Currency from the drop down list.
8. Select your Scaling options.

In the Save Report section, click:

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

Please note, if you check the Display on Homepage box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

10. Click the **Download Report** icon, to download the report.

## 9.15.2 Viewing Forecast Comparison Report

This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet. Please note, only submitted forecasts are included in this report.

## Navigation

Forecast > Reports > Forecast Comparison Report

## Prerequisites

None

## Steps

Follow these steps to view the Forecast Comparison Report:

### General

1. Select the Forecast Category that you want to include in your report. Forecast Category is always considered as a filter.
2. Select the Credit Type that you want to include in your report.

### Forecast 1

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select the Sales Group from the drop down list.
4. Optionally, search for a Salesperson by typing in a name, or partial name, and clicking **Go**. Managers can run this report for Sales Group or Sales people. Sales people can run this report only for themselves.

### Forecast 2

5. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
6. Select the Period from the drop down list.
7. Select the Sales Group from the drop down list.
8. Search for a Salesperson by typing in a name, or partial name, and clicking **Go**.

### Display Options

9. Select the "Display most recent forecast for period" or "Display all submitted forecasts for period" as desired.
10. Select Reporting Currency.

## 11. Select Scaling.

In the Save Report section, click:

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

## 12. If you want to display the report on your home page, check the Display on Homepage box.

If you select the Display on Homepage box, you must go to the **Profiles > Homepage** preferences and select the report there to actually display the report on your home page.

### 9.15.3 Viewing Forecast Summary Report by Product Category

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

The threshold functionality for this report has changed. For example, when you choose " $\leq 1000$ ", it will display each opportunity that is less than or equal to 1000, and will rollup all other opportunities into the threshold amount row indicated by "Totals  $> 1000$ " (meaning all others greater than 1000).

In forecast worksheet, opportunities less than or equal to 1000, are rolled up into the threshold record.

Opportunities are included in the report based on the sales group selected. The sales group that you select is used as the top level (starting point) for showing opportunities. Selecting a particular worksheet "level" will show all forecast values for the groups at that level. To filter (reduce) the number of optties displayed choose a lower sales group as a starting point.

#### Navigation

Forecast > Reports > Forecast Summary Report by Product Category

## Prerequisites

None

## Steps

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

From the Create Forecast Summary by Product Category Report page select the options that you want to include in your report.

## Filters

Under the Filters section you can select from any of the following filters.

1. Select the Period Type from the drop down list. This is the period for which you want the report to return data.
2. Select the Period for which you want to run the report.
3. Select the Credit Type.
4. Select the radio button for either using Forecast Category or Product Category as a filter.
5. Select a Sales Stage, if applicable.
6. Select a Win Probability from the drop down lists, if applicable.
7. Select an Operating Unit, if applicable.
8. Enter an Opportunity Name, if applicable.
9. Select a Threshold Amount.
10. Select a Sales Group, if you want to filter your report using this criteria.
11. Enter a Salesperson full or partial name and click **Go**.
12. Select a Customer Category, if applicable.
13. Select a Channel from the list of values.
14. Select a Status from the list of values.
15. Enter a project name to use as a filter, if applicable.

## Display Options

Under the Display Options, you can select from the following choices:

1. Select a Reporting Currency from the drop down list.

2. Select a Product Category by selecting the radio button.
3. Select the "Exclude deals where all forecast amounts are 0.00" if you want to exclude those items.
4. Select a Worksheet Type from the drop down list. The drop down values will display the sales group levels for which the report can be run (i.e., Level 1-Group, Level 2-Subordinate, etc.). There is also a "View Groups" link next to the Worksheet Type drop down to display the groups included in the group level selection. This option is available to managers only.
5. Add Displayed Columns from the Available Columns by using the > button. To remove Displayed Columns use the < button. If you want to add all the Available Columns to the Displayed Columns area use >> button.
6. Select your preference from the "Columns will be scaled as" drop down list.
7. Choose the Sort Rows by, Then by, Finally by options from each drop down list.
8. In the Save Report section, click:
  1. **Save:** to save the report.
  2. **Save and Run Report:** to run the report and save it.
  3. **Run Report:** to run the report without saving the report.
  4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.

If you select Run Report, the "Always run using indicated period" is set to "Indicated" so that the currently selected period is used to run the report. If you select Save, or Save and Run, the indicator is not forced so that the saved query can be configured to use either the "Current" period (moves with time) or the "Indicated" period (fixed).

## 9.15.4 Viewing Forecast Accuracy Report

This report provides the historical accuracy of the forecast values for the specified period and sales group/person.

### Navigation

Forecast > Reports > Forecast Accuracy Report

### Prerequisites

None

## Steps

Follow these steps to view the Forecast Accuracy report:

## Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select the Sales Group from the drop down list.
4. Search for a Salesperson by typing in a name, or partial name, and clicking **Go**.

## Display Options

5. Select Reporting Currency.
6. Select Scaling.

In the Save Report section, click:

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

If you check the Display on Homepage box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

Please note, if the Actuals section of the report does not display an amount, you must enter Actuals from the **Administration > Sales > Budget/Revenue Entry** link.

8. To download the report, click the **Download Report** icon.

## 9.15.5 Viewing Forecast to Pipeline Summary Report

This report provides management a way to compare the current period pipeline with a comparison period and generate conversion ratios. Please note, this report uses submitted pipeline numbers.

## Navigation

Forecast > Reports > Forecast to Pipeline Summary Report

## Prerequisites

None

## Steps

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

## Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select Comparison Period.
4. Select Forecast Category.
5. Select the Sales Group from the drop down list.
6. Search for a Salesperson by typing in a name, or partial name, and clicking **Go**.
7. Select Credit Type from the drop down list.

## Display Options

8. Select Reporting Currency.
9. Select Scaling.

In the Save Report section, click:

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

If you check the Display on Homepage box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

11. To download the report, click the **Download Report** icon.

## 9.15.6 Viewing Forecast Summary Report

This report provides management with the summary of the current forecast in comparison to a particular base period.

It is important to know that if a change is made in the Win Loss Indicator, the concurrent request, `as_sales_credit_denorm` must be run in "Complete" mode in order for these changes to appear for the accuracy of this report.

### Overview

The following criteria provides the basis for this report:

Variance from FY Comparison Period Actuals equals YTD Forecast minus FY of the Comparison Period Actuals. Therefore, Variance From FY-01-01 Actuals should be YTD Forecast minus FY-01-01 Actuals =  $3999 - 6666 = -2667$ .

### Navigation

Forecast > Reports > Forecast Summary Report

### Prerequisites

None

### Steps

#### Filters

1. Select the Period Type from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the Period from the drop down list.
3. Select Comparison Period.
4. Select Forecast Category.
5. Select the Sales Group from the drop down list.
6. Search for a Salesperson by typing in a name, or partial name.

7. Click **Go**.
8. Select **Credit Type** from the drop down list.

### Display Options

9. Select **Reporting Currency**.
10. Select **Scaling**.

In the **Save Report** section, click:

1. **Save**: to save the report.
2. **Save and Run Report**: to run the report and save it.
3. **Run Report**: to run the report without saving the report.
4. Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.
11. Check the "Display on Homepage" box to display the report on your home page.  
  
If you check the **Display on Homepage** box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.
12. To download the report, click the **Download Report** icon.

## 9.15.7 Viewing Forecast Progression Report

This report provides the progression of submitted forecasts between the specified dates and for the sales group/person.

### Navigation

Forecast > Reports > Forecast Progression Report

### Prerequisites

None

### Steps

1. Select the **Period Type** from the drop down list. This indicates the period type that will be used to filter this report.
2. Select the **Period** from the drop down list.

3. Select the Date Range.
4. Select the "To" Date Range.
5. Enter the number of day you want to show progress in.
6. Select Forecast Category.
7. Select the Sales Group from the drop down list.
8. Search for a Salesperson by typing in a name, or partial name.
9. Select Credit Type from the drop down list.

### Display Options

10. Select Reporting Currency.
11. Select Scaling.

In the Save Report section, click:

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

If you check the Display on Homepage box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

13. Click the **Download Report** icon to download the report.

Please note, if you have selected a forecast period in the future, the Forecast Progression Report will use the last submitted values. For example, if today is January 1, 2003 and you want a Forecast Progression Report for January 1, 2003 to January 31, 2003, your last submitted forecast values will be used to generate the report.

## 9.15.8 Creating a Report

### Navigation

Forecast > Reports

### Prerequisites

None

### Steps

Follow these steps to create a forecast report:

1. Select a forecast report.
2. Select new search filters.
3. Select new display options.
4. Select new sort options.
5. Enter a new report name.
6. Save and run the report.

## 9.15.9 Viewing Forecast History (Self) Chart

This chart gives the ability to graph the submitted forecast numbers for a sales person.

### Navigation

Forecast > Reports

### Prerequisites

A forecast history must exist.

### Steps

1. Set up the parameters by selecting the Forecast History (self) link.
2. Select the period type from the drop down list.
3. Select the start period from the drop down lists.
4. Click **Save**.

5. To run the chart, click **Run Chart**.

### 9.15.10 Viewing Forecast History (Subordinates) Chart

This chart gives a sales manager the ability to graph the submitted forecast numbers for his/her subordinate sales representatives or groups.

#### **Navigation**

Forecast > Reports

#### **Prerequisites**

A subordinates forecast history must exist.

#### **Steps**

1. Set up the parameters by selecting the Forecast History (subordinates) link.
2. Select the period type from the drop down list.
3. Select the start period from the drop down lists.
4. Click **Save**.
5. To run the chart, click **Run Chart**.

Sections in this chapter include:

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

### 10.1 Overview of the Customer Tab

Use the Customer tab to create and maintain Organizations, People, Contacts, and Lists by clicking the related subtab. Quick links at the top of the page and the "Return to Top" links in each section allow for easy navigation between sections.

Access to view, create, or update customer information is governed by the implementation of security settings for the application. Please refer to the *Oracle Sales Online Implementation Guide*, section "*Setting Up Users, Security, and Reporting Hierarchy*" or "*Setting Up Flexible Data Security*" for information about these topics.

By default, the Customer tab opens to the Organization Summary page. From the Customer tab, you can use the following subtabs:

- [Section 10.2, "Organization Subtab"](#)
  - [Section 10.2.1, "Personalizing Organization Summary"](#)
  - [Section 10.2.2, "Creating a New Organization"](#)
  - [Section 10.2.3, "Maintaining Organization Details"](#)

- Section 10.2.5, "Searching for an Organization"
- Section 10.2.6, "Adding Classifications"
- Section 10.2.7, "Creating and Maintaining Relationships"
- Section 10.2.8, "Maintaining Lead Details"
- Section 10.2.9, "Creating Opportunities"
- Section 10.2.10, "Maintaining Opportunity Details"
- Section 10.2.11, "Maintaining Quote Details"
- Section 10.2.12, "Notes"
- Section 10.2.13, "Sales Teams"
- Section 10.2.14, "Tasks"
- Section 10.2.15, "Interactions"
- Section 10.2.16, "Attachments"
- Section 10.2.17, "Accounts"
- Section 10.2.18, "360 Degree View"
- Section 10.3, "Person Subtab"
  - Section 10.3.2, "Personalizing Person Summary"
  - Section 10.3.3, "Creating a Person"
  - Section 10.3.4, "Maintaining Person Details"
  - Section 10.3.5, "Adding Classifications"
  - Section 10.3.6, "Searching for a Person"
  - Section 10.3.7, "Sending Collateral"
  - Section 10.3.8, "Creating and Maintaining Relationships"
  - Section 10.3.9, "Leads"
  - Section 10.3.10, "Creating Opportunities"
  - Section 10.3.11, "Maintaining Quote Details"
  - Section 10.3.12, "Notes"
  - Section 10.3.13, "Sales Teams"
  - Section 10.3.14, "Tasks"

- Section 10.3.15, "Interactions"
- Section 10.3.16, "Attachments"
- Section 10.3.17, "Accounts"
- Section 10.3.18, "360 Degree View"
- Section 10.4, "Contacts Subtab"
  - Section 10.4.1, "Personalize Contact Summary"
  - Section 10.4.2, "Creating a Contact"
  - Section 10.4.3, "Searching for a Contact"
  - Section 10.4.4, "Maintaining Contact Details"
  - Section 10.4.5, "Adding Classifications"
  - Section 10.4.6, "Managing Contact Notes"
  - Section 10.4.7, "Creating a Contact Task"
  - Section 10.4.8, "Managing Contact Attachments"
  - Section 10.4.9, "Managing Contact Interactions"
  - Section 10.4.10, "Sending Collateral from the Contact Summary Table"
- Section 10.5, "Contact List Subtab"
  - Section 10.5.1, "Creating a Contact List Using Filters"
  - Section 10.5.2, "Creating a Contact List by Manually Adding Contacts"
  - Section 10.5.4, "Saving a Contact List"
  - Section 10.5.5, "Downloading a Contact List"
  - Section 10.5.6, "Personalizing the Summary Table Display"
  - Section 10.5.7, "Adding Additional Filters to a Contact List"
  - Section 10.5.8, "Viewing List Filters"
  - Section 10.5.9, "Manually Add a Contact to a List"
  - Section 10.5.10, "Removing a Contact From a List"
  - Section 10.5.11, "Removing a List"
  - Section 10.5.12, "Call Sheet Overview"
  - Section 10.5.13, "Generating a Call Sheet"

- [Section 10.5.14, "Viewing Call Sheet Details"](#)
- [Section 10.5.15, "Sorting a Call Sheet"](#)
- [Section 10.5.16, "Selecting Multiple Contacts"](#)
- [Section 10.5.17, "Adding a Task"](#)
- [Section 10.5.19, "Viewing Calendar Tasks"](#)
- [Section 10.6, "Customer Reports"](#)
  - [Section 10.6.2, "Viewing the Task Classification Report"](#)

## 10.2 Organization Subtab

The Organization main page, "My Organizations (Sales Team)", displays all organizations for which you are on the sales team. See the following topics covered in this section.

- [Section 10.2.1, "Personalizing Organization Summary"](#)
- [Section 10.2.2, "Creating a New Organization"](#)
- [Section 10.2.3, "Maintaining Organization Details"](#)
- [Section 10.2.4, "Creating a New Address for the Organization"](#)
- [Section 10.2.5, "Searching for an Organization"](#)
- [Section 10.2.6, "Adding Classifications"](#)
- [Section 10.2.7, "Creating and Maintaining Relationships"](#)
- [Section 10.2.8, "Maintaining Lead Details"](#)
- [Section 10.2.9, "Creating Opportunities"](#)
- [Section 10.2.10, "Maintaining Opportunity Details"](#)
- [Section 10.2.11, "Maintaining Quote Details"](#)
- [Section 10.2.12, "Notes"](#)
- [Section 10.2.13, "Sales Teams"](#)
- [Section 10.2.14, "Tasks"](#)
- [Section 10.2.15, "Interactions"](#)
- [Section 10.2.16, "Attachments"](#)

- [Section 10.2.17, "Accounts"](#)
- [Section 10.2.18, "360 Degree View"](#)

## 10.2.1 Personalizing Organization Summary

Please refer to the *Oracle Sales Online Implementation Guide* section "Factors That Affect Security", in the "Creating Organizations and Locations" section to understand how profile options affect the personalization if set at various levels. For example, setting the profile **OS: Customer Access Privilege** will affect personalizing the organization summary.

### Navigation

Customer > Organization

### Prerequisites

None

### Steps

Follow these steps to personalize the organization summary page:

1. Click **Personalize**.
2. Change, add, or remove parameters.
3. Change, add, or remove display options.
4. Change, add, or remove sort options.
5. Enter a Search Name.
6. Check the Use as Summary Page Default box.
7. Click **Save**, or **Save and Apply Search**.

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

## 10.2.2 Creating a New Organization

Organizations are companies and other entities with which you do business.

When creating an organization it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

### Navigation

Customer > Organization

### Prerequisites

None

### Related Profiles

**OS: Address Required for Organization** affects the application in the following ways:

- If set to "Yes" then the address is mandatory for creating an organization.
- If set to "No" then you can create without the address.

**OS: Create Organization Privilege:** If set to "Yes", user can create organizations.

### Steps

Follow these steps to create a new organization:

1. Click **Create** or go to [Steps for Quick Create](#).

The Create Organization page opens.

The following table describes the fields that are available on the Create Organization page. Fields which are required are indicated in the "Required Field" column of the table. Use the links at the top of the page to navigate directly to a specific section, such as, Address or Contacts.

- [Company Information](#)
- [Address](#)
- [Contacts](#)
- [Organization Relationships](#)

## Create Organization

Enter the details of the organization and click "Create". Clicking on the "Clear" button will clear all the information that you have entered.

### Organization Profile

* Organization <input type="text"/>	Alias <input type="text"/>
Pronunciation <input type="text"/>	<input checked="" type="radio"/> External <input type="radio"/> Internal
Email Address <input type="text"/>	Phone Book <input type="text"/>
Web Site <input type="text"/>	(Country Code, Area Code, Number, Extension)

[Return To Top](#)

### Company Information

Annual Revenue <input type="text"/>	Total Employees <input type="text"/>
Fiscal Year End <input type="text"/>	Year Established <input type="text"/>
SIC Code Type <input type="text"/>	SIC Code <input type="text"/> <input type="button" value="Go"/>
DUNS Number <input type="text"/>	Business Line <input type="text"/>
Tax ID <input type="text"/>	Customer Category <input type="text"/>
Context Value <input type="text"/> <input type="button" value="Go"/>	

Select Context Value and click 'Go' to show relevant fields.

\* Indicates required field to create an organization.

[Return To Top](#)

The following table describes the available Create Organization fields.

Field	Required Field	Description
Organization	Yes	Enter the organization name that will be used to identify the organization within the application.
Pronunciation	No	You can enter the organization name's pronunciation.
Email Address	No	Enter the organization's email address.
Web Site	No	Enter the organization's web site.
Alias	No	Enter an alias, if applicable.
External/Internal	No	The default is External. Use Internal only if you are creating your organization.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Phonebook	No	Click the phonebook link to select another party phone number to display.

### **Company Information**

The following table describes the fields in the Company Information section.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Annual Revenue	No	Select from the drop down list.
Fiscal Year End	No	Enter the fiscal year end.
SIC Code Type	No	Select from the drop down list.
Duns Number	No	Enter the Dunn and Bradstreet number in this field.
Tax ID	No	Enter the tax identification number.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.
SIC Code	No	Select the SIC code.
Business Line	No	Enter the business line.
Customer Category	No	Select the customer category.

## Address Information

### Address

Country

\*Address1

Address2

Address3

Address4

\*State

County

City

Postal Code

Address Type

### Address Attributes

\*Status

Do Not Mail

Reason

Context Value

Select Context Value and click 'Go' to show relevant fields.

[Return To Top](#)

The following table describes fields in the Address section.

Field	Required Field	Description
Country	No	Select country from the drop down list.
Address Line 1	Yes	Enter the organization address.
Address Line 2	No	Enter additional organization address information.
Address Line 3	No	Enter additional organization address information.
Address Line 4	No	Enter additional organization address information.
State	No	Select from the drop down list.
County	No	Enter in the county field.
City	No	Enter in the city field.
Postal Code	No	Enter in the postal code field.

Field	Required Field	Description
Address Type	No	Select an address type from the list of values.
Status	Yes	Select Active or Inactive from the drop down list.
Do Not Mail	No	Check the box if mail should not be sent.
Reason	No	Select a reason for not sending mail.

### Contact Information

Type in the partial or full last name of the person and click "Go" to select an existing person to be added as a contact.

You can create new contacts or organization relationships by entering their information in the table shown below.

#### Contacts

Type in the partial or full last name of the person and click "Go" to select an existing person to be added as a contact. You can create new contacts by entering their information in the table below.



Add a Person

Eraser	Title	*First Name	*Last Name	*Relationship	Phone Book	Email Address
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee Of <input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee Of <input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee Of <input type="text"/>	<input type="text"/>	<input type="text"/>

\* Indicates required field to create a contact.

[Return To Top](#)

The following table describes fields in the Contact section.

Field	Required Field	Description
Add a Person	Yes	If you are going to add a contact, enter the full or partial name and click the <b>Go</b> button.
Eraser	No	To erase a contact from the table, click the eraser icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.
Last Name	Yes	Enter the last name.

Field	Required Field	Description
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Address	No	Select an email address by clicking the email address book icon.

### Organization Relationships

Type in the partial or full organization name and click "Go" to select an existing organization to be added to the table.

You can create new organizations by entering their information in the table shown below.

#### Organization Relationships

Type in the partial or full organization name and click "Go" to select an existing organization to be added to the table. You can create new organizations by entering their information in the table below.



Add an Organization

Erase	*Relationship	*Related Organization	*Status	Start Date	End Date
	Partner Of	<input type="text"/>	Active	<input type="text"/>	<input type="text"/>
	Partner Of	<input type="text"/>	Active	<input type="text"/>	<input type="text"/>
	Partner Of	<input type="text"/>	Active	<input type="text"/>	<input type="text"/>

\* Indicates required field to create a relationship.

[Return To Top](#)

The following table describes Organization Relationship fields.

Field	Required Field	Description
Add an Organization	Yes	If you are going to add an organization relationship, enter the full or partial name and click <b>Go</b> .
Erase	No	To erase a relationship from the summary table, click the Erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Related Organization	Yes	This field holds the name of the related organization.
Status	Yes	Indicate the status of the relationship.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

## 2. Click **Create**.

### **Steps for Quick Create**

When creating an organization it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

1. Click **Quick Create**.
2. The Quick Create Organization page opens.
3. Enter the name by which the organization will be identified.
4. Optionally, enter the DUNS number. The number associated with Dunn and Bradstreet information.
5. Optionally, enter the organization phone number.
6. Optionally, select the phone type, i.e., mobile, fax, pager.
7. Optionally, select the country that is associated with the address of the organization you are creating.
8. Enter the address in Address 1.
9. Select the state that the organization address is associated with. All other address fields are optional.
10. Click **Create**.

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

## 10.2.3 Maintaining Organization Details

Keeping organization details current is an important part of this application's functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

### Navigation

Customer > Organization

### Prerequisites

An organization must exist and you must have access to the organization.

### Steps

Follow these steps to update details about an existing organization:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. To select an organization, click the organization's link.

The **Organization Detail** Main page opens.

3. Add or update information on the page as seen below.

Organization: Bigmart

Update
Restore

---

**Organization Profile**

\* Organization

Pronunciation

External System Number **1318**

Web Site

Email Address Book

Alias

External  Internal

Number **1168**

Status

Phone Book

(Country Code, Area Code, Number, Extension)

[Return To Top](#)

---

**Company Information**

Annual Revenue

Last Order Date **14-02-2001** [View All Orders](#)

Fiscal Year End

\* SIC Code Type

DUNS Number

Tax ID

Context Value

Total Employees

Lifetime Value **200.00**

Year Established

\*SIC Code

Business Line

Customer Category

\* Indicates required field to create an organization.

[Return To Top](#)

The following table describes the Organization Detail fields.


Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Pronunciation	No	Enter the pronunciation of the organization's name.
External System Number	No	View the external system number here.
Web Site	No	Click the link to view the organization's web site. Click the icon to add or edit web site addresses.
Email Address Book	No	Enter the email address here or click the email address book to select another address.










<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Alias	No	Enter an organization alias.
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization.
Number	No	View the number assigned to the organization.
Status	No	Select a status from the drop down list.
Phonebook	No	Click the phonebook icon to select another phone number.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Last Order Date	No	View the last order date.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
SIC Code Type	No	Select the Standard Industry Code type from the drop down list. SIC Code Version and SIC Code cannot be modified unless a valid selection is made using the SIC Code List of Values.
DUNS Number	No	Dunn and Bradstreet Number is pre-populated.
Tax Code/ID	No	Enter the tax code.
Total Employees	No	Enter the total number of employees.
Lifetime Value	No	View the sum of all the orders placed by the customer.
Year Established	No	Enter the year the organization was established.
SIC Code	No	Select the Standard Industry Code from the drop down list.
Business Line	No	Enter a business line, if applicable.
Customer Category	No	Select customer category from the drop down list.

4. The Address section allows you to edit information about the organization's address.

**Addresses**

The existing addresses are listed below. Select to view the active, inactive, or all addresses by using the dropdown below. Click on the "Create Address" button to create a new address.

View  

 Identifying	Status	Address	History	Map	Phone Book	Type	Primary
<input checked="" type="radio"/>	Active	<a href="#">48 State St AR 38019</a>	<a href="#">History</a>			Bill To Ship To	<input checked="" type="checkbox"/>
<input type="radio"/>	Active	<a href="#">100 Walnut St CA</a>	<a href="#">History</a>			Market	<input type="checkbox"/>
<input type="radio"/>	Active	<a href="#">101 Sycamore St CA</a>	<a href="#">History</a>			Market	<input type="checkbox"/>
<input type="radio"/>	Active	<a href="#">23 Maple Street CA</a>	<a href="#">History</a>				<input type="checkbox"/>

[Return To Top](#)

The following list helps to identify the fields in this section:

- Identifying: Main address used to identify the organization
- Status: Displays the status indicated in the details
- History: Address history of the organization
- Map It: Map the address by clicking the icon
- Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
- Type: Displays the address type indicated in the details
- Primary: Used to indicate primary address type across physical addresses

To create a new address, click the **Create Address** button. See [Section 10.2.4, "Creating a New Address for the Organization"](#).

5. In the Organization Restrictions section you can update specific preferences for this organization.

The following list helps to identify the fields in this section:

- Restriction: Select the restriction topic
- Start Date: Choose a start date for this preference
- End Date: Choose an end date for this preference
- Reason: Select a reason

### Organization Restrictions



*Restriction	*Start Date	End Date	Reason
Fax	01-SEP-2002		Privacy Preference

\* Indicates required field to create a preference for this organization.

Update Restore Nominate Reference

[Return To Top](#)

6. Click **Update** to add the information that you have entered.

## 10.2.4 Creating a New Address for the Organization

### Navigation

Customer > Organization

### Prerequisites

None

### Steps

To create a new address for this organization, follow these steps:

1. Click **Create Address**.
2. Select the country from the drop down list. This is a required field.

The page will display fields according to the country that you have chosen. Since each country's address fields may be different, your page may display other fields than those that are listed in the following steps.

3. Enter the address. The only required field is Address 1.
4. Enter the state. This is a required field.
5. Select a status from the drop down list. This is a required field.
6. All other fields are optional.
7. Click **OK**.

The Organization Detail page opens.

8. Click **Update**.

## 10.2.5 Searching for an Organization

### Navigation

Customer > Organization

### Prerequisites

None

Oracle Sales Online provides two ways to search for information:

[Quick Find](#) and [Advanced Search](#)

### Quick Find

Quick Find is a single field search.

### Steps

To search using **Quick Find**:

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

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

- Email: matches the email address for organizations, people and contacts
- Opportunity: matches on the opportunity name
- Opportunity Owner: matches on the opportunity owner
- Organization: matches on the organization name
- Person: matches on the person's last name
- Contact: matches on the person's last name and they are defined as a contact
- Lead: matches on the lead name
- Company Research: links to the Hoover's Inc. company research database
- Appointment: matches on the appointment name

- Task: matches on the task name
- Notes: matches on the note name

The wildcard character, percent sign (%), can be used to replace one or more characters in the search string. The percent sign cannot be the first character in the search string.

## 2. Click **Go**.

The quick find displays only the basic information about the object.

There are profile options to control the level of access to customer, leads and opportunities. When the profile for customers is limited to Sales Team access, you will be able to find the organization, person or contact, but not view the detail page.

When the profile for leads and opportunity is limited to Sales Team access, you will not be able to find any lead or opportunity unless you are on the sales team.

When the profiles are set to Full access, you will be able to find, view the details, and update the objects.

## **Advanced Search**

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

## **Example**

You are trying to locate a person or contact in Oracle Sales Online and only have the person's telephone number with no additional information. Whereas Quick Find is limited to person, organization, email, etc., Advanced Search allows you to customize your search.

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

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

## Steps

To search using **Advanced Search**:

1. Click the **Advanced Search** link or the Personalize button.  
Advanced Searches are available with the following tabs:
  - Customer
  - Partner
  - Lead
  - Opportunity
2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

Once a search is saved, the name will become an option for the object's summary page.

## 10.2.6 Adding Classifications

You can add classifications to an organization, person, or contact.

### Navigation

Customer > Organization, Person, or Contact > Classification

### Prerequisites

Classifications must be set up from the Administration tab.

### Steps

1. Select a Class Category from the drop down list.  
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use percent sign (%) as a wild card.

5. Choose a code by checking the "Select" box.
6. Click **Select**.
7. Click **Update**.

You can modify and add data, such as Primary, Start Date, and End Date from this page.

## 10.2.7 Creating and Maintaining Relationships

Organizations can have two types of relationships: Organization to Organization and Organization to Person. Use Organization to Organization relationships to create relationships between companies, such as, parent and subsidiary, headquarters and division, partner and competitor. Use Organization to Person relationships to create business contact relationships.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of customers and related customer existing addresses. If you change one of these addresses, you must complete this action by going to the customer or related customers record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

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

### 10.2.7.1 Creating an Organization to Organization Relationship

#### Navigation

Customer > Organization > Relationships

#### Prerequisites

The Organization should exist.

#### Related Implementation Information

Refer to the "Setting up Relationships" section, "Setting Up Relationships for Customers Upgrading from Previous Releases" of the *Oracle Sales Online Implementation Guide*. Information about setting the "Create Party" flag to "Yes" is related to this functionality. This setup can be performed by a System Administrator.

Following profile options must be set at the site level:

- *OSO: Disable Page Level Security* set to "Yes"
- *OSO: Person Detail Security Check* set to "No"

### **Steps**

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

1. Select an existing organization. Or click the "Create New Organization" link if you want to create a new organization.
2. Select the relationship type between the two organizations.
3. Select a start and end date for this relationship, if applicable.
4. Optionally, enter email address and phone number in the fields provided.
5. Select the relationship status from the drop down list.
6. Enter notes by selecting the note type and status from the drop down list.
7. Enter the note text in the text box.
8. To relate this note, select the related item type from the drop down. Enter the name, click **Go**.
9. Click **Create**.

### **10.2.7.2 Creating an Organization to Person Relationship**

#### **Navigation**

Customer > Organization > Relationships

#### **Prerequisites**

The Organization should exist.

### **Steps**

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

1. Select an existing person. Or click the "Create New Person" link if you want to create a new person.
2. Select the relationship type between the organization and the person.

Type in the partial or full last name of the person and click "Go" to select a person.

3. Select a start and end date for this relationship, if applicable.
4. Optionally, enter email address and phone number in the fields provided.
5. Select the relationship status from the drop down list.
6. Optionally, enter mailstop, department, job title, preferred language, manager, department type, and job title type.
7. Indicate whether this person is a decision maker or reference by checking the associated box.
8. Enter notes by selecting the note type and status from the drop down list.
9. Enter the note text in the text box.

Notes

Type  Status

Note

Relate Note To

Type  Name   Description

\* Indicates required field to create a note.

[Return To Top](#)

10. To relate this note, select the related item type from the drop down. Enter the name, click **Go**.
11. Click **Create**.

## 10.2.8 Maintaining Lead Details

### Navigation

Customer > Organization > Leads

### Steps

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

1. Search for the organization from which you want to edit lead details using [Using Quick Find or Advanced Search](#).

2. Click the organization link to select it.

The Organization Detail Main page opens.

3. Click **Leads**.

You can update the following fields on the Organization Detail page for leads.

- Lead Name
- Customer
- Status
- Lead Rank
- Channel
- Timeframe
- Budget Status
- Budget Amount
- Assigned Date

4. Click **Update**.

## 10.2.9 Creating Opportunities

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

### Navigation

Customer > Organization > Opportunities

### Prerequisites

None

### Steps

Follow these steps to create a new opportunity:

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table or, using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.
3. Click **Opportunities**.  
You will see a summary of all opportunities for the specific organization.
4. Click **Create**.

## 10.2.10 Maintaining Opportunity Details

You can update opportunity details directly from the summary table.

### Navigation

Customer > Organization > Opportunities

### Prerequisites

An opportunity must exist.

### Steps

1. From the **Customer** tab, you can select an organization by clicking the organization link from the summary table or, using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.

3. Click **Opportunities**.  
You will see a summary of all opportunities for the specific organization.
4. The following fields can be updated:
  - Sales Stage
  - Win Probability
  - Status
  - Close Date
  - Amount
5. Update information.
6. Click **Update**.

## 10.2.11 Maintaining Quote Details

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

### Navigation

Customer > Organization > Quotes

### Prerequisites

A quote must exist.

### Steps

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization or person link to select it.  
The Organization Detail page opens.
3. Click **Quotes**.  
The Quote Detail page opens.
4. Update quote information.
5. Click **Update**.

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

## 10.2.12 Notes

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

- [Section 10.2.12.1, "Creating a Note"](#)
- [Section 10.2.12.2, "Viewing a Note"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

### 10.2.12.1 Creating a Note

#### Navigation

Customer > Organization > Notes

#### Prerequisites

None

#### Steps

Follow these steps to create a note:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The **Organization Detail** Main page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.  
You can change the default type using Profiles.
5. Optionally, select the box labeled **Private** if you do not want your sales team members to view this note.
6. Enter your notes in the text box.
7. Click **Create**.

---

---

**Note:** Once a note is created, it cannot be updated.

---

---

## 10.2.12.2 Viewing a Note

### Navigation

Customer > Organization > Notes

### Prerequisites

The note must exist.

### Steps

Follow these steps to view a note:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The **Organization Detail** Main page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.  
The default type can be changed using Profiles.
5. Choose the number of days for which you want the notes history.
6. Click **Apply**.
7. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
8. To view "All Notes" in a printable version, click **All Notes**.

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

## 10.2.13 Sales Teams

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

The sales team is divided into two sections:

- Internal: salespeople or internal users
- External: partners and partner users

Partner and partner contacts can be added to the external sales team of an organization, lead, or opportunity if:

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

For information about partners, please refer to the *Oracle Partners Online User Guide*.

You can filter sales teams by the following criteria:

- Sales Group list of values
- Salesperson list of values
- Territory Location list of values
- Roles dropdown

### See Also

- [Section 10.2.13.1, "Adding a Sales Team Member"](#)
- [Section 10.2.13.2, "Adding a Partner to a Sales Team"](#)
- [Section 10.2.13.3, "Adding a Resource Team to a Sales Team"](#)
- [Section 10.2.13.4, "Removing a Sales Team Member"](#)

### Related Profiles

**OS: Always Put Creator on Sales Team**

When a salesperson has sales team access to customer records, the creator of the record is always added to the sales team. If a salesperson has full/prospecting access, then the profile "OS: Always Put Creator on Sales Team", is used to decide whether the salesperson is added to the customer sales team. If the profile is set to "Yes", then the salesperson is added to the sales team. If set to "No", the user is not added to the sales team.

### 10.2.13.1 Adding a Sales Team Member

#### Navigation

Customer > Organization > Sales Team > Internal

#### Prerequisites

None

#### Steps

Follow these steps to add a sales team member:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Sales Team**.

## Opportunity: Bluelight Accessories Jul 2001

Customer [A. C. Networks](#)

Opportunity [Bluelight Accessories Jul 2001](#)

### Internal Sales Team

#### Filters

Select sales team filters below and click "Apply" to see the sales team members in the results section below.

Sales Person   Sales Group

Location   Role

#### Internal Sales Team Results

Below is the list of the sales team members. Type in the partial or full last name of the sales person in the Add a Salesperson text box and click "Go" to select a salesperson to be added as a sales team member.

Add a Salesperson   

Remove	Sales Group	Salesperson	Territory Location	Job Title	Owner	Full Access	Role	Keep
<input type="checkbox"/>	Key Accts West	Ambers, Ralph (RAMBERS)			<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Referral	<input checked="" type="checkbox"/>
<input type="checkbox"/>		Douglas, Elizabeth (EDOUGLAS)			<input type="radio"/>	<input checked="" type="checkbox"/>	Referral	<input type="checkbox"/>
<input type="checkbox"/>		Sprague, Helena (HESPRAGUE)			<input type="radio"/>	<input checked="" type="checkbox"/>	Referral	<input type="checkbox"/>

First | Previous  Next | Last

**Tip:** Check the Keep checkbox to prevent the system from removing a sales team member in case of territory reassignment.

**Tip:** The opportunity owner must always have full access. You may remove full access from the current owner by first assigning a new owner to the opportunity.

4. Select sales team filters and click **Apply** to see the sales team members in the results section.
5. Enter the last name or partial name of the sales representative in the "Add a Salesperson" field, and click **Go**.
6. Click the salesperson link. The salesperson will be added to the summary table.
7. Click **Update**.

Note: Check the Keep box to prevent the system from removing a sales team member in case of territory reassignment.

Note: The opportunity owner must always have full access. You may remove full access from the current owner by first assigning a new owner to the opportunity.

### 10.2.13.2 Adding a Partner to a Sales Team

#### Navigation

Customer > Organization > Sales Team > External

#### Prerequisites

None

#### Steps

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

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

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

#### Reference

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

### 10.2.13.3 Adding a Resource Team to a Sales Team

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

#### Navigation

Customer > Organization > Sales Team > Internal


#### Prerequisites

None

## Steps

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

1. Type in the full or partial resource team name in the Add a Resource Team text box.

Add a Resource Team   

Remove	Resource Team	Territory Location
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

First | Previous  Next | Last

2. Click **Go** to select a resource team to be added to the sales team.
3. The members of the resource team will appear in the Internal and External Sales Team lists after you click **Update** to save your changes.
4. Click **Update**.

### 10.2.13.4 Removing a Sales Team Member

## Navigation

Customer > Organization > Sales Team Member > Internal

## Prerequisites

A sales team member must exist on the sales team.

## Steps

Follow these steps to remove a sales team member:

1. Select sales team filters and click **Apply** to see the sales team members in the results section.
2. Locate the salesperson that you want to remove on the summary table.

---

---

**Note:** You cannot remove the salesperson if they are the only sales team member assigned to the customer.

---

---

3. Check the Remove box.
4. Click **Update**.

## 10.2.14 Tasks

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

- [Section 10.2.14.1, "Creating a Task"](#)
- [Section 10.2.14.2, "Adding an Attachment to a Task"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

### 10.2.14.1 Creating a Task

#### Navigation

Customer > Organization > Tasks

#### Prerequisites

None

#### Steps

Follow these steps to create a task:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Sales Team**.
4. Click **Tasks**.
5. Click **Create**.

The Create Task page opens.

6. Select Task Type from the drop down list.  
If the task is a private task, select the Private box. This task can only be assigned to you.
7. Enter the Task Name.
8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the task owner, click **Go**.
14. Select a task owner by clicking the link from the list of search results.
15. Optionally, you can relate the task to an opportunity, organization, person or relationship, click **Go**.  
The default, since you are creating the task in the context of an organization, is related to that organization.
16. Click **Create**.

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

### 10.2.14.2 Adding an Attachment to a Task

#### Navigation

Customer > Organization > Attachments

#### Prerequisites

The task must exist.

#### Steps

Follow these steps to add an attachment:

1. Search for the organization using [Using Quick Find or Advanced Search](#).

2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Attachments**.
4. Click **Add**.  
The **Add Attachment** page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

## 10.2.15 Interactions

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

- [Section 10.2.15.1, "Viewing Interactions"](#)

### 10.2.15.1 Viewing Interactions

#### Navigation

Customer > Organization > Interactions

#### Prerequisites

The interaction must exist.

#### Steps

Follow these steps to view interactions:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Interactions**.
4. Select search filters.
5. Click **Apply**.

## 10.2.16 Attachments

Attachments are defined as documents, URLs, or text. The most common use of attachments is for sharing and storing information about a customer. For example, attach a press release about a customer for future reference.

- [Section 10.2.16.1, "Adding an Attachment"](#)
- [Section 10.2.16.2, "Viewing an Existing Attachment"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

### 10.2.16.1 Adding an Attachment

#### Navigation

Customer > Organization > Attachments

#### Prerequisites

None

#### Steps

Follow these steps to add an attachment:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Attachments**.
4. Click **Add**.  
The Add Attachment page opens.
5. Enter a description, click Text, File, or URL.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

## 10.2.16.2 Viewing an Existing Attachment

### Navigation

Customer > Organization > Attachments

### Steps

To view an existing attachment, click the attachment link.

## 10.2.17 Accounts

Accounts are used to track and report financial transactions. Whenever a customer places an order, an invoice is created or payment made, the transactions are posted against the customer's account. In the Campaign to Cash business flow, an account must be created before an order can be entered for the customer.

Only valid addresses that satisfy the address validation rules that you have set up within Oracle Accounts Receivable can be used as account sites. Those that are not valid will display with a "lock" icon and cannot be used to create account sites.

- [Section 10.2.17.1, "Creating Accounts"](#)
- [Section 10.2.17.2, "Maintaining Account Details"](#)
- [Section 10.2.17.3, "Viewing Account Sites"](#)
- [Section 10.2.17.4, "Viewing Account Roles"](#)
- [Section 10.2.17.5, "Viewing Account Relationships"](#)

### 10.2.17.1 Creating Accounts

#### Navigation

Customer > Organization > Accounts

#### Prerequisites

None

#### Steps

Follow these steps to create an account:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.

The Organization Detail Main page opens.

**3. Click Accounts.**

The Account Summary page opens with all accounts that exist for the Organization or Person.

**4. Click Create.**

The Create Account page opens.

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

Field	Required Field	Description
Account Name	No	Enter the account name.
Status	No	Select a status from the drop down list.
Activation Date	No	Select an activation date by clicking the calendar icon and choosing a date.
Subcategory Code	No	Select a subcategory code from the drop down list.
Tax Code	No	Select a tax code from the drop down list.
Deposit Refund Method	No	Enter the deposit refund method.

**5. Click Create.**

## 10.2.17.2 Maintaining Account Details

### Navigation

Customer > Organization > Accounts

### Prerequisites

An account for an organization must exist.

### Steps

Follow these steps to view an account:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.

The Organization Detail Main page opens.

3. Click **Accounts**.

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

The Account Detail page opens.

The following table describes the Account Detail fields.

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

5. Edit information.
6. Click **Update**.

### 10.2.17.3 Viewing Account Sites

#### Navigation

Customer > Organization > Accounts

#### Prerequisites

An account site must exist.

#### Steps

Follow these steps to view an account site:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.
5. Click **Sites**.
  1. To add a site, click **Add Site**.
  2. Select an address that already exists
    - Change the site use by selecting from the drop down list
    - Check the Primary box, if applicable
    - Change the site Status by selecting from the drop down list
  3. To view site details, click the site **Address** link.
  4. To view site history, click **History**.
  5. To map the site address, click **Map It**.

## 10.2.17.4 Viewing Account Roles

### Navigation

Customer > Organization > Accounts

### Prerequisites

An account role must exist.

### Steps

Follow these steps to view an account role:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.
5. Click **Roles**.
  - a. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using percent sign (%) as a wildcard. Click **Go**.
  - b. To remove a role, locate the related account and click the Erase icon.
  - c. To change the role type, select from the drop down list.
  - d. To indicate a primary role, select the Primary Role radio button.
  - e. To change the status, select from the drop down list.
  - f. To find an address, enter the full or partial address using percent sign (%) as a wildcard. Click **Go**.
  - g. Select an effective date by clicking the calendar icon and choosing a date.
  - h. Select an end date by clicking the calendar icon and choosing a date.
6. Click **Update**.

## 10.2.17.5 Viewing Account Relationships

### Navigation

Customer > Organization > Accounts

### Prerequisites

An account relationship must exist.

### Steps

Follow these steps to view an account relationship:

1. Search for the organization using [Using Quick Find or Advanced Search](#).
2. Click the organization link to select it.  
The Organization Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.
5. Click **Relationships**.
  - a. To remove a relationship, locate the related account and click the Erase icon.
  - b. To find a related account number, enter the account number and click **Go**.
  - c. The related account name will populate the field.
  - d. To change the relationship type, select from the drop down list.
  - e. To change the status, select from the drop down list.
  - f. To indicate a reciprocal relationship, check the Reciprocal box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
6. Click **Update**.

## 10.2.18 360 Degree View

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns, and Service Requests.

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

### 10.2.18.1 Viewing 360 Degree View

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns, Service Requests, and Quotes. To view projects from the 360 degree view, Oracle Projects must be installed.

#### Navigation

Customer > Organization > 360 View

#### Prerequisites

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns, and Service Requests.

#### Steps

Follow these steps to use 360 degree view:

1. From the **Customer** tab, select an organization or person. Search using [Using Quick Find or Advanced Search](#).  
The Organization detail main page opens.
2. Click **360 View**.
3. You can view summary pages for each of the following by clicking each link:
  - **Orders:** Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.

- **Invoices:** Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.
  - **Service Requests:** A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.
  - **Products:** This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.
  - **Returns:** Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.
  - **Projects:** You can view the projects for the associated customer organization or person. Drill down to view the project details.
  - **Campaigns:** Provides a list of campaigns the customer has been a part of. This is populated from Oracle Marketing.
  - **Events:** A list of events onto which the customer has enrolled. This is populated from Oracle Marketing.
4. Click a link to view the details of any available item.

## 10.3 Person Subtab

The following tasks can be performed from the Person subtab:

- [Section 10.3.2, "Personalizing Person Summary"](#)
- [Section 10.3.3, "Creating a Person"](#)
- [Section 10.3.4, "Maintaining Person Details"](#)
- [Section 10.3.5, "Adding Classifications"](#)
- [Section 10.3.6, "Searching for a Person"](#)
- [Section 10.3.7, "Sending Collateral"](#)
- [Section 10.3.8, "Creating and Maintaining Relationships"](#)
- [Section 10.3.9, "Leads"](#)
- [Section 10.3.10, "Creating Opportunities"](#)
- [Section 10.3.11, "Maintaining Quote Details"](#)
- [Section 10.3.12, "Notes"](#)
- [Section 10.3.13, "Sales Teams"](#)
- [Section 10.3.14, "Tasks"](#)
- [Section 10.3.15, "Interactions"](#)
- [Section 10.3.16, "Attachments"](#)
- [Section 10.3.17, "Accounts"](#)
- [Section 10.3.18, "360 Degree View"](#)

### 10.3.1 Person Summary

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

An example:

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

### 10.3.2 Personalizing Person Summary

You can use the Personalize button to define your own personal list of People. The default view is "My People" where you will see details for those people who are also on your sales team.

#### Navigation

Customer > Person

#### Steps

Follow these steps to personalize the person summary:

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

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

### 10.3.3 Creating a Person

When creating a person it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

#### Navigation

Customer > Person

## Prerequisites

None

## Related Profiles

Profile options set during implementation govern the way a person is created. The profile option "*OS: Address Required for Person*" affects the application in the following ways:

- If set to "Yes" then the address is mandatory for creating a person. It is then required that you go to the "Create Person" page where you must enter the address while creating the person. In this case there are no empty rows in the contact table.
- If set to "No" then you can create without the address. You are not required to go to the "Create Person" page. Instead, you can create a new person and a contact by entering data in empty rows in the contact table. In this case the "Create Person" button is not displayed.

*OS: Create Person Privilege*: If set to "Yes", user can create people.

## Steps

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

1. Click **Create** or go to [Steps for Quick Create](#).

The Create Person page opens.

- [Additional Information](#)
- [Business Information](#)
- [Personal Information](#)
- [Notes](#)

## Create Person

Enter the details of the person and click "Create". Clicking on the "Clear" button will clear all the information that you have entered.

### Person Profile

* Last Name <input type="text"/>	Last Name Pronunciation <input type="text"/>
* First Name <input type="text"/>	First Name Pronunciation <input type="text"/>
Preferred Name <input type="text"/>	Middle Name <input type="text"/>
Title <input type="text"/>	Salutation <input type="text"/>

\* Indicates required field to create a person.

[Return To Top](#)

### Additional Information

Second Title <input type="text"/>	Person Initials <input type="text"/>
Suffix <input type="text"/>	Date of Birth <input type="text"/>
Gender <input type="text"/>	Native Language <input type="text"/>
Tax ID <input type="text"/>	Person ID Number <input type="text"/>
Context Value <input type="text"/>	<input type="button" value="Go"/>

Select Context Value and click 'Go' to show relevant fields.

[Return To Top](#)

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

Field	Required Field	Description
Last Name	Yes	Enter the last name of the person you are creating.
First Name	Yes	Enter the first name of the person you are creating.
Preferred Name	No	Enter the name by which the person you are creating prefers to be addressed, if different from their actual name, if applicable.
Title	No	Select a title that is appropriate for the person you are creating.
Last Name Pronunciation	No	Enter the pronunciation of the last name of the person you are creating.
First Name Pronunciation	No	Enter the pronunciation of the first name of the person you are creating.
Middle Name	No	Enter the middle name of the person you are creating.
Salutation	No	Enter a salutation, if applicable.

### Additional Information

In this section you can keep track of information as outlined in the following table.

Field	Required Field	Description
Second Title	No	Enter a second title, if desired.
Suffix	No	Enter a suffix, if applicable.
Gender	No	Select a gender from the drop down list.
Tax ID	No	Enter the tax identification number.
Personal Initials	No	Enter personal initials in this field.
Date of Birth	No	Select date of birth.
Native Language	No	Select from the drop down list.
Person ID Number	No	Select a status from the drop down list.

### Business Information

Business information will be saved only if you have entered a relationship and an organization.

#### Business Information

\*Relationship

\*Organization

Address

Manager

Department

Job Title

Role

Business Phone

(Country Code, Area Code, Number, Extension)

Business Email Address

Start Date

Decision Maker  Reference

Mailstop

Department Type

Job Title Type

Preferred Language

Phone Type

End Date

\* Indicates required field to save business information. Business information will be saved only if you have entered a relationship and an organization.

[Return To Top](#)

The following table describes the Business Information section.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Relationship	Yes	Select a relationship from the drop down list.
Organization	Yes	Select an organization to form the business relationship with.
Address	No	Enter a business address.
Manager	No	Find the manager by entering the full or partial name and clicking <b>Go</b> .
Department	No	Enter the department, if applicable.
Job Title	No	Enter a job title.
Role	No	Select a role from the drop down list.
Business Phone	No	Select a phone number from the party list by clicking the phonebook icon.
Business Email		Enter the business email address.
Start Date	No	Select a date by clicking the calendar icon.
Decision Maker	No	Check the box to indicate that the person is a decision maker.
Reference	No	Check the box to indicate the person can be considered a reference.
Mail Stop	No	Enter the mail stop.
Department Type	No	Select the department type.
Job Title Type	No	Select the job title type from the drop down list.
Preferred Language	No	Select the preferred language from the drop down list.
Phone Type	No	Select the phone type from the drop down list.
End Date	No	Select a date by clicking the calendar icon.

## Personal Information

Keep track of personal information about this person with the personal information section.

### Personal Information

Personal Phone       
(Country Code, Area Code, Number, Extension)

Personal Email Address

Country

\*Address1

Address2

Address3

Address4

\*State

County

City

Postal Code

Address Type

### Address Attributes

Start Date

End Date

\*Status

Reason

Do Not Mail

Context Value    
Select Context Value and click 'Go' to show relevant fields.

[Return To Top](#)

2. In the Personal Information section, you can enter information such as:

- Personal Phone
- Personal Email
- Country
- Address Lines 1-4
- State
- County
- City

- Postal Code
- Address Type
- Start Date
- End Date
- Status
- Reason

## Notes

Keep track of notes about this person in this section.

### Notes

Type  Status

Note

#### Relate Note To

Type  Name   Description

\* Indicates required field to create a note.

[Return To Top](#)

3. In the Notes sections, you can enter notes associated with this person.
  1. Select the note type from the drop down list.
  2. Select the status of the note.
  3. Enter text in the Note box.
4. Click **Create**.

### **Steps for Quick Create**

When creating a person it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

For more information about flexible address formatting, please refer to the *Oracle Receivables User Guide* section on Flexible Addresses.

1. Click **Quick Create**.
2. The Quick Create Person page opens.
3. Enter the last name and first name of the person that you are creating.
4. Optionally, select the person's date of birth.
5. Optionally, enter the person's phone number.
6. Optionally, select the phone type of the phone number, i.e., fax, mobile, pager.
7. Optionally, select the country that is associated with the address of the person you are creating.
8. Enter the address in Address 1.
9. Select the state that the person address is associated with. All other address fields are optional.
10. Click **Create**.

## **10.3.4 Maintaining Person Details**

Keeping person details current is an important part of Oracle Sales Online functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

### **Navigation**

Customer > Person

### **Prerequisites**

A person must exist.

### **Steps**

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

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person from the Search Results page by clicking the person's link.  
The Person Detail page opens.

[Additional Information](#) [Personal Addresses](#) [Product Interests](#) [Personal Interests](#) [Restrictions](#)

### Person:Pauline Garrar

Update
Restore

<p>*Last Name <input type="text" value="Garrar"/></p> <p>*First Name <input type="text" value="Pauline"/></p> <p>Preferred Name <input type="text"/></p> <p>Job Title <input type="text"/></p> <p>External System Number <b>PER:2384</b></p> <p>Personal Email Address Book <input type="text" value=""/></p> <p>Status <input type="text" value="Active"/></p>	<p>Last Name Pronunciation <input type="text"/></p> <p>First Name Pronunciation <input type="text"/></p> <p>Middle Name <input type="text" value="Alice"/></p> <p>Salutation <input type="text"/></p> <p>Person Number <b>3163</b></p> <p>Personal Phone Book <input type="text" value=""/></p>
---	---

[Return To Top](#)

#### Additional Information

<p>Last Order Date <b>Not Present</b> <a href="#">View All Orders</a></p> <p>Second Title <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Gender <input type="text"/></p> <p>Tax ID <input type="text"/></p> <p>Context Value <input type="text"/> <input type="button" value="Go"/></p>	<p>Lifetime Value <b>Not Present</b></p> <p>Person Initials <input type="text"/></p> <p>Date of Birth <input type="text" value="24-05-1965"/></p> <p>Native Language <input type="text" value="Brazilian Portuguese"/></p> <p>Person ID Number <input type="text" value="2384"/></p>
---	--

Select Context Value and click 'Go' to show relevant fields.

\* Indicates required field to create a person.

The following table describes the Person Details fields.

Field	Required Field	Description
Last Name	Yes	This is the last name of the person.
First Name	Yes	This is the person's first name.
Preferred Name	No	If they have a preferred name, you can enter it here.
Title	No	This is the title by which the person prefers to be addressed.
External System Number	No	View the external system number.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.
Status	No	Select from the drop down list.
Last Name Pronunciation	No	Enter the pronunciation of the last name.
First Name Pronunciation	No	Enter the pronunciation of the first name.
Middle Name	No	Enter the middle name.
Salutation	No	Enter a salutation if desired.
Person Number		Read only field.
Personal Phone Book	No	This is the personal phone number for the person.
Last Order Date	No	View the last order date.
Second Title	No	Enter the second title, if desired.
Suffix	No	Enter a suffix, such as Mr., Mrs., Ms., Dr.
Gender	No	This is the gender of the person.
Tax ID	No	
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
Personal Initials	No	
Date of Birth	No	Enter the date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.
Person ID Number	No	









## Personal Address

The existing addresses are listed. Select to view the active, inactive, or all addresses by using the drop down. Click the "Create Address" button to create a new address.

### Personal Addresses

The existing addresses are listed below. Select to view the active, inactive, or all addresses by using the dropdown below. Click on the "Create Address" button to create a new address.

View  

Identifying	Address	Map	Phone Book	Status	Type	Primary
<input checked="" type="radio"/>	<a href="#">48 State St AR 38019</a> <a href="#">History</a>		<input type="text" value=""/>	 Active	Bill To Ship To	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<input type="radio"/>	<a href="#">100 Walnut St CA</a> <a href="#">History</a>		<input type="text" value=""/>	 Active	Market	<input type="checkbox"/>
<input type="radio"/>	<a href="#">101 Sycamore St CA</a> <a href="#">History</a>		<input type="text" value=""/>	 Active	Market	<input type="checkbox"/>
<input type="radio"/>	<a href="#">23 Maple Street CA</a> <a href="#">History</a>		<input type="text" value=""/>	 Active		<input type="checkbox"/>

[Return To Top](#)

- In the Personal Addresses section you can edit information such as:
  - Identifying Address: Main address used to identify the person
  - History: Address history of the person
  - Map: Map the address by clicking the icon
  - Phonebook: This is the phone number that is associated with a particular address. For example, if you are a sales person and have several field offices that you frequent, you can have a phone number for the Miami office, the Orlando office, and the Tampa office recorded in this area. Change the phone number by clicking the phone icon.
  - Status: Displays the status indicated in the details
  - Type: Displays the address type indicated in the details

## Product Interests

Indicate the products that this person is interested in within this section.

### Product Interests



Remove	*Product	Comments
	Accessories	
	Accessories	
	Accessories	

\* Indicates required field to create a product interest for this person.

[Return To Top](#)

- In the Product Interests section you can edit information such as:
  - Remove: To remove a product interest item, check the Remove box
  - Product: Select a product from the drop down list
  - Comments: Enter comments directly into the comments field

## Personal Interests

Indicate the personal interests of this person in this section.

### Personal Interests



Remove	*Interest Type	*Interest Name	Comments

\* Indicates required field to create a personal interest for this person.

[Return To Top](#)

- In the Personal Interests section you can edit information such as:
  - Remove: To remove a personal interest item, check the Remove box
  - Interest Type: Select an interest type from the drop down list
  - Interest Name: Enter the interest name
  - Comments: Enter comments directly into the comments field

## Person Preferences

Indicate personal preferences in this section.

### Person Preferences



*Restriction	*Start Date	End Date	Reason
Fax	01-SEP-2002		Privacy Preference

\* Indicates required field to create a preference for this person.

[Return To Top](#)

6. In the Person Preferences section you can edit information such as:
  - Preference: Indicate what preference you are entering
  - Topic: Select the topic from the drop down list
  - Topic Type: Select the type of topic from the drop down list
  - Start Date: Select a start date by clicking the calendar icon and choosing a date
  - End Date: Select an end date by clicking the calendar icon and choosing a date
  - Reason: Select a reason from the drop down list
  - Cascade: Cascade preference to contact points
7. Click **Update**.

## 10.3.5 Adding Classifications

You can add classifications to an organization, person, or contact.

### Navigation

Customer > Organization, Person, or Contact > Classification

### Prerequisites

Classifications must be set up from the Administration tab.

### Steps

1. Select a Class Category from the drop down list.  
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use percent sign (%) as a wild card.
5. Choose a code by checking the "Select" box.
6. Click **Select**.

## 10.3.6 Searching for a Person

### Navigation

Customer > Person

### Prerequisites

A person must exist.

### Steps

Follow these steps to search for a person:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. To select the person, click the person's link.

### 10.3.7 Sending Collateral

Send collateral to your business contacts using this feature.

#### Prerequisites

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

#### Steps

Follow these steps to send collateral:

1. Select a customer. Use [Using Quick Find or Advanced Search](#).
2. Click **Send Collateral**.  
The Fulfillment Wizard page opens.
3. Select a Template from the drop down list.
4. Click **Continue**.
5. Select a Master Document by checking box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Select the Output Method (email) from the drop down list, and click **Continue**.  
The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list.
9. Click **Done**.

### 10.3.8 Creating and Maintaining Relationships

You can create Person to Organization and Person to Person Relationships from the Person subtab. Follow the instructions detailed below.

#### Related Implementation Information

Refer to the "Setting up Relationships" section, "Setting Up Relationships for Customers Upgrading from Previous Releases" of the *Oracle Sales Online Implementation Guide*. Information about setting the "Create Party" flag to "Yes" is related to this functionality. This setup can be performed by a System Administrator.

Following profile options must be set at the site level:

- OSO: Disable Page Level Security set to Yes
- OSO: Person Detail Security Check set to No

### 10.3.8.1 Creating a Person to Organization Relationship

#### **Navigation**

Customer > Person > Relationship

#### **Prerequisites**

None

#### **Steps**

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

1. Select an existing organization. Or click the "Create New Organization" link if you want to create a new organization.

[Additional Information](#) [Notes](#)

## Add an Organization Relationship to: Jane Doe

### Relationship Information

First select an existing organization from below. Or click on the "Create New Organization" link if you want to create a new organization. Then select the relationship type between the person and the organization.

\*Organization   [Create New Organization](#)

Address

\*Relationship Type

Start Date   End Date

Start Date will be defaulted to today's date if empty

Email Address  Phone Book

(Country Code, Area Code, Number, Extension)

Status

Context Value

Select Context Value and click 'Go' to show relevant fields.

[Return To Top](#)

### Additional Information

Mailstop  Manager

Department  Department Type

Job Title  Job Title Type

Preferred Language

Decision Maker  Reference

2. Select the relationship type between the person and the organization.
3. Optionally, select a start and end date. Start date will be defaulted to today's date if empty.
4. Enter email address and phone number, if known.
5. Select a Status from the drop down list.
6. Optionally, enter additional information for mailstop, department, job title, preferred language, manager, department type, and job title type.
7. In the Notes section, you can enter a note by selecting the note type from the drop down list, and entering the note text in the text field.

Notes

Type  Status

Note

Relate Note To

Type  Name   Description

\* Indicates required field to create a note.

[Return To Top](#)

8. Click Create.

### 10.3.8.2 Creating a Person to Person Relationship

Use these steps to create a relationship between people. For example, Mary Kline reports to Ken Smith.

#### Navigation

Customer > Person > Relationships

#### Prerequisites

None

#### Steps

1. Select an existing person. Or click on the "Create New Person" link if you want to create a new person.
2. Select the relationship type between the two people.  
Type in the partial or full last name of the person and click "Go" to select a person.

[Additional Information](#) [Notes](#)

## Add a Contact to: Jane Doe

### Relationship Information

First select an existing person from below. Or click on the "Create New Person" link if you want to create a new person. Then select the relationship type between the two people.

**Tip:** Type in the the partial or full last name of the person and click "Go" to select a person.

\*Person   [Create New Person](#)

Address

\*Relationship Type

Start Date   End Date

Start Date will be defaulted to today's date if empty

Email Address  Phone Book

(Country Code, Area Code, Number, Extension)

Status

Context Value

Select Context Value and click 'Go' to show relevant fields.

\*Indicates required field to create a contact.

[Return To Top](#)

3. Optionally, enter a start and end date. Start date will be defaulted to the day you create the relationship if left empty.
4. Optionally, enter the email address and select a phone number by clicking the Phonebook icon.
5. Select a Status from the drop down list.
6. In the Notes section, you can enter a note by selecting the note type from the drop down list, entering the note text in the text field.
7. Click **Create**.

## 10.3.9 Leads

From the Person subtab, you can maintain lead details.

- [Section 10.3.9.1, "Maintaining Lead Details"](#)

### 10.3.9.1 Maintaining Lead Details

#### Navigation

Customer > Person > Leads

#### Prerequisites

A lead must exist.

#### Steps

Follow these steps to main lead details:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Click the person's link to select it.  
The Person Detail Main page opens.
3. Click **Leads**.  
The Leads summary page opens.
4. Select a lead by clicking the lead link.  
The Lead Detail page opens.
5. Update lead details.
6. Click **Update**.

## 10.3.10 Creating Opportunities

#### Navigation

Customer > Person > Opportunities

#### Prerequisites

None

## Steps

Follow these steps to create a new opportunity:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person by clicking the person's link.  
The Person Detail page opens.
3. Click **Opportunities**.
4. Click **Create**.  
The Create Opportunity page opens.
5. From this page you can enter opportunity details, purchase items, contacts, and notes information. Required fields are marked with an asterisk.
6. Click **Create**.

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

## 10.3.11 Maintaining Quote Details

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

### Navigation

Quote

### Prerequisites

A quote must exist.

## Steps

Follow these steps to maintain quote details:

1. Search for the person using [Using Quick Find or Advanced Search](#).
2. Click the person's link to select it.  
The Organization or Person Detail Main page opens.
3. Click **Quotes**.  
The Quote Detail page opens.

4. Update quote information.
5. Click **Update**.

## 10.3.12 Notes

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

- [Section 10.3.12.1, "Creating a Note"](#)
- [Section 10.3.12.2, "Viewing a Note"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

### 10.3.12.1 Creating a Note

#### Navigation

Customer > Person > Notes

#### Prerequisites

None

#### Steps

Follow these steps to create a note:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person by clicking the person's link.  
The Person Detail page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.  
You can change the default type by changing the Profile. Click the Profiles icon in the upper right corner of the application page.
5. Optionally, select the box labeled Private if you do not want your sales team members to view this note.
6. Enter your notes in the text box.

7. Click **Create**.

---

---

**Note:** Once a note is created, it cannot be updated.

---

---

### 10.3.12.2 Viewing a Note

#### Navigation

Customer > Person > Notes

#### Prerequisites

None

#### Steps

Follow these steps to view a note:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person by clicking the person's name link.  
The Person Detail page opens.
3. Click **Notes**.
4. Select a Type from the drop down list.
5. Choose the number of days for which you want the notes history.
6. Click **Apply**.

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

Click **All Notes** to view all the notes in a printer-friendly format. Click the **Text** icon to see the entire note.

## 10.3.13 Sales Teams

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

The Sales Team is divided into two sections:

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

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

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

You can filter sales teams by the following criteria:

- Sales Group list of values
- Sales person list of values
- Territory Location list of values
- Roles dropdown

Flexfields will not be included as a filter criteria.

The page will always show the entire list when you navigate to the sales team page. The filter parameters cannot be personalized.

### See Also

- [Section 10.3.13.1, "Adding a Sales Team Member"](#)
- [Section 10.3.13.2, "Adding a Partner to a Sales Team"](#)
- [Section 10.3.13.3, "Adding a Resource Team to a Sales Team"](#)
- [Section 10.3.13.4, "Removing a Sales Team Member"](#)

### Related Profiles

**OS: Always Put Creator on Sales Team**

When a salesperson has sales team access to customer records, the creator of the record is always added to the sales team. If a salesperson has full/prospecting access, then the profile "OS:Always Put Creator on Sales Team", is used to decide whether the salesperson is added to the customer sales team. If the profile is set to "Yes", then the salesperson is added to the sales team. If set to "No", the user is not added to the sales team.

### 10.3.13.1 Adding a Sales Team Member

#### Navigation

Customer > Person > Sales Team > Internal

#### Prerequisites

None

#### Steps

Follow these steps to add a sales team member:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person by clicking the person's link.  
The Person Detail page opens.
3. Click **Sales Team**.
4. Enter the last name or partial name of the sales representative in the "Add a Salesperson" field, click **Go**.
5. If you are searching for a salesperson outside of your Business Unit, choose the business unit from the drop down list, click **Go**.
6. Click the salesperson link. The salesperson will be added to the Sales Team summary table.
7. Enter territory properties, and click **Go**.
8. Select a Role from the drop down list.
9. You can view the email address and phone number fro this salesperson.
10. Click **Update**.

### 10.3.13.2 Adding a Partner to a Sales Team

#### Navigation

Customer > Person > Sales Team > External

#### Prerequisites

None

#### Steps

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

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person by clicking the person's link.  
The Person Detail page opens.
3. Click **Sales Team**.
4. Enter the partner name in the "Add a Partner" field, click **Go**.  
It is recommended that you search by last name only.
5. Select a partner from the search results page by clicking the link.
6. Click **Update**.

### 10.3.13.3 Adding a Resource Team to a Sales Team

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

#### Navigation

Customer > Person > Sales Team > Internal

#### Prerequisites

None

#### Steps

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

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Click the person's link to select it.  
The Person Detail page opens.
3. Click **Sales Team**.
4. In the Add a Resource field, enter the resource name using percent sign (%) as a wildcard, and click **Go**.
5. Select a resource from the search results page by clicking the link.
6. Click **Update**.

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

#### 10.3.13.4 Removing a Sales Team Member

##### Navigation

Customer > Person > Sales Team > Internal

##### Prerequisites

A sales team member must exist on the sales team.

##### Steps

Follow these steps to remove a sales team member:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Click the person link to select it.  
The Person Detail page opens.
3. Click **Sales Team**.
4. Locate the sales person that you want to remove from the sales team.

---

---

**Note:** You cannot remove the salesperson if they are the only sales team member assigned to the customer.

---

---

5. Check the **Remove** box.
6. Click **Update**.

## 10.3.14 Tasks

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

- [Section 10.3.14.1, "Creating a Task"](#)
- [Section 10.3.14.2, "Maintaining Task Details"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

### 10.3.14.1 Creating a Task

#### Navigation

Customer > Person > Tasks

#### Prerequisites

None

#### Steps

Follow these steps to create a task:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person from the Search Results page by clicking the person's name link.  
The Person Detail page opens.
3. Click **Tasks**.
4. Click **Create**.
5. Select Task Type from the drop down list.
6. If the task is a private task, select the **Private** box. This task can only be assigned to you.
7. Enter the Task Name.

8. Enter the Task Description.
9. Choose the Priority from the drop down list.
10. Select the Status from the drop down list.
11. Select a planned start date by clicking the calendar icon and selecting a date.
12. Optionally, select a planned start time and end time by selecting from the drop down lists.
13. Enter the name of the person you are assigning the task, click **Go**.
14. The "Relate to" field defaults to the person, click **Go**.  

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

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

### 10.3.14.2 Maintaining Task Details

#### Navigation

Customer > Person > Tasks

#### Prerequisites

A task must exist.

#### Steps

Follow these steps to view a task:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Click the person's link.  
The Person Detail main page opens.
3. Click **Tasks**.  
The summary table displays all tasks for the person.
4. Click the task link to view details.

The Task Detail page opens.

5. Click **Update**.

## 10.3.15 Interactions

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

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---

**Note:** Oracle Sales Online users cannot create or edit interactions.

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---

### 10.3.15.1 Viewing Interactions

#### Navigation

Customer > Person > Interactions

#### Prerequisites

Interactions must exist.

#### Steps

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

Follow these steps to view interactions:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person from the Search Results page by clicking the person's name link.  
The Person Detail page opens.
3. Click **Interactions**.
4. You can select filters such as Media Type, Activity, Source, and Date Ranges.
5. Click **Apply**.

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

## 10.3.16 Attachments

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

- [Section 10.3.16.1, "Adding an Attachment"](#)
- [Section 10.3.16.2, "Viewing an Existing Attachment"](#)

For additional information, please refer to the *Oracle CRM Application Foundation User Guide*.

### 10.3.16.1 Adding an Attachment

#### Navigation

Customer > Person > Attachments

#### Prerequisites

None

#### Steps

Follow these steps to add an attachment:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person.  
The Person Detail page opens.
3. Click **Attachments**.
4. Click **Add**.  
The Add Attachment page opens.
5. Enter a description, click Text, File, or URL.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

## 10.3.16.2 Viewing an Existing Attachment

### Navigation

Customer > Person

### Steps

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select a person.  
The Person Detail page opens.
3. Click the attachment link from the person's detail page.

## 10.3.17 Accounts

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

- [Section 10.3.17.1, "Creating Accounts"](#)
- [Section 10.3.17.2, "Maintaining Account Details"](#)
- [Section 10.3.17.3, "Viewing Account Sites"](#)
- [Section 10.3.17.4, "Viewing Account Roles"](#)
- [Section 10.3.17.5, "Viewing Account Relationships"](#)

### 10.3.17.1 Creating Accounts

#### Navigation

Customer > Person > Accounts

#### Prerequisites

None

#### Steps

Follow these steps to create an account:

1. Search for the person using [Using Quick Find or Advanced Search](#).
2. Click the person link to select it.

The Person Detail Main page opens.

**3. Click Accounts.**

The Account Summary page opens with all accounts that exist for the Person.

**4. Click Create.**

The Create Account page opens.

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

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

**5. Click Create.**

### 10.3.17.2 Maintaining Account Details

#### Navigation

Customer > Person > Accounts

#### Prerequisites

An account for a person must exist.

## Steps

Follow these steps to view an account:

1. Search for the person using [Using Quick Find or Advanced Search](#).
2. Click the person link to select it.  
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.  
The following table describes the Account Detail fields.

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

Field	Required Field	Description
Termination Date	No	View the termination date.

5. Edit information.
6. Click **Update**.

### 10.3.17.3 Viewing Account Sites

#### Navigation

Customer > Person > Accounts

#### Prerequisites

An account site must exist.

#### Steps

Follow these steps to view an account site:

1. Search for the person using [Using Quick Find or Advanced Search](#).
2. Click the person link to select it.  
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.
5. Click **Sites**.
  1. To add a site, click **Add Site**.
  2. Select an address that already exists
    - Change the site use by selecting from the drop down list
    - Check the Primary box, if applicable
    - Change the site Status by selecting from the drop down list
  3. To view site details, click the site **Address** link.

4. To view site history, click **History**.
5. To map the site address, click **Map It**.

#### 10.3.17.4 Viewing Account Roles

##### Navigation

Customer > Person > Accounts

##### Prerequisites

An account role must exist.

##### Steps

Follow these steps to view an account role:

1. Search for the person using [Using Quick Find or Advanced Search](#).
2. Click the person link to select it.  
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.
5. Click **Roles**.
  1. To add a role, select person or organization from the Add drop down list. Enter the full or partial item name using percent sign (%) as a wildcard. Click **Go**.
  2. To remove a role, locate the related account and click the Erase icon.
  3. To change the role type, select from the drop down list.
  4. To indicate a primary role, select the Primary Role radio button.
  5. To change the status, select from the drop down list.
  6. To find an address, enter the full or partial address using percent sign (%) as a wildcard. Click **Go**.
  7. Select an effective date by clicking the calendar icon and choosing a date.
  8. Select an end date by clicking the calendar icon and choosing a date.

6. Click **Update**.

### 10.3.17.5 Viewing Account Relationships

#### Navigation

Customer > Person > Accounts

#### Prerequisites

An account relationship must exist.

#### Steps

Follow these steps to view an account relationship:

1. Search for the person using [Using Quick Find or Advanced Search](#).
2. Click the person link to select it.  
The Person Detail Main page opens.
3. Click **Accounts**.
4. Select an account from the summary table by clicking the account's link.  
The Account Detail page opens.
5. Click **Relationships**.
  1. To remove a relationship, locate the related account and click the Erase icon.
  2. To find a related account number, enter the account number and click **Go**.  
The related account name will populate the field.
  3. To change the relationship type, select from the drop down list.
  4. To change the status, select from the drop down list.
  5. To indicate a reciprocal relationship, check the Reciprocal box. Please note, once you have created a reciprocal relationship, you cannot remove the relationship.
6. Click **Update**.

## 10.3.18 360 Degree View

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

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

### 10.3.18.1 Viewing 360 Degrees

#### Navigation

Customer > Person > 360 View

#### Prerequisites

In order to use the 360 degree view, you must have *iStore* installed to view orders, *Install Base* to view products installed, and *iSupport* to view the Invoices, Returns, Service Requests, and Quotes. Additionally, *Oracle Projects* must be installed to view projects.

#### Steps

Follow these steps to use 360 degree view:

1. Search for a person using [Using Quick Find or Advanced Search](#).
2. Select the person from the search results.
3. Click **360 View**.
4. You can view summary pages for each of the following by clicking each link:
  - **Orders:**  
Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.
  - **Invoices:**

Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.

- **Service Requests:**

A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.
  - **Products:**

This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.
  - **Returns:**

Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.
  - **Projects:**

You can view the projects for the associated customer organization or person. Drill down to view the project details.
  - **Campaigns:**

Provides a list of campaigns in which the customer was involved. This is populated from Oracle Marketing.
  - **Events:**

A list of events onto which the customer has enrolled. This is populated from Oracle TeleSales.
5. Click a link to view the details of any available item.

## 10.4 Contacts Subtab

A contact is a relationship between a person and a customer. A customer may be an organization, or a person.

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

An example:

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

### See Also

- [Section 10.4.1, "Personalize Contact Summary"](#)
- [Section 10.4.2, "Creating a Contact"](#)
- [Section 10.4.3, "Searching for a Contact"](#)
- [Section 10.4.4, "Maintaining Contact Details"](#)
- [Section 10.4.5, "Adding Classifications"](#)
- [Section 10.4.6, "Managing Contact Notes"](#)
- [Section 10.4.7, "Creating a Contact Task"](#)
- [Section 10.4.8, "Managing Contact Attachments"](#)
- [Section 10.4.9, "Managing Contact Interactions"](#)
- [Section 10.4.10, "Sending Collateral from the Contact Summary Table"](#)

## 10.4.1 Personalize Contact Summary

You can personalize your contact summary page to fit your needs. Follow the instructions outlined in the steps below.

### Navigation

Customer > Contact

### Prerequisites

None

### Steps

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

## 10.4.2 Creating a Contact

### Navigation

Customer > Contact

### Prerequisites

None

### Related Profiles

**OS: Create Contact Privilege:** If set to "Yes", user can create contacts. If set to "No" user cannot create contacts.

### Steps

1. Click **Create**.

The Create Contact page opens. Quick links at the top of the page allow for easy navigation to "Additional Information" or "Notes." The "Return to Top" links allow you to navigate back to the top of the page quickly.

[Additional Information](#) [Notes](#)

## Create Contact

A contact is a relationship between a person and a customer. Customer may be an organization or another person.

### Relationship Information

First select an existing person and an existing customer from below. Click on the "Create New Person" link if you want to create a new person. Then select the relationship type between the person and the customer.

**Tip:** Type in the partial or full last name of the person and click "Go" to select a person.

\*Person   [Create New Person](#)

\*Customer

Address

\*Relationship Type

Start Date   End Date

Start Date will be defaulted to today's date if empty

Email Address  Phone Book

(Country Code, Area Code, Number, Extension)

Status

Context Value

Select Context Value and click 'Go' to show relevant fields.

[Return To Top](#)

2. First select an existing person and an existing customer.
  - Type in the full or partial last name of the person and click **Go** to select a person. Select a customer for which the person is a contact.
3. Click the "Create New Person" link if you want to create a new person.
4. Select the relationship type between the person and the customer.
5. Select a Start Date and End Date by clicking the Calendar icon and choosing dates. Start Date will be defaulted to today's date if empty.
6. Enter the Email Address for the contact.
7. Select a Phone Number from the Phone Book by clicking the phone book icon.
8. Select a Status from the drop down list of values.
9. Select Context Value and click **Go** to show relevant fields.

### Additional Information

Enter additional information about this contact in the section shown below. None of the following fields are required.

**Additional Information**

Mailstop  Manager

Department  Department Type

Job Title  Job Title Type

Preferred Language   Decision Maker  Reference

Context Value

Select Context Value and click 'Go' to show relevant fields.

\*Indicates required field to create a contact.

[Return To Top](#)

### Notes

Enter notes in the section shown below.

**Notes**

Type  Status

Note

**Relate Note To**

Type  Name   Description

\* Indicates required field to create a note.

[Return To Top](#)

10. Select the Type from the drop down list.
11. Select the note Status.
12. Enter the note text in the text box provided.
13. Relate the note to an item, if desired.
14. Click **Create**.

## 10.4.3 Searching for a Contact

### Navigation

Customer > Contact

### Prerequisites

A contact must exist.

### Steps

1. You can search for a contact using [Using Quick Find or Advanced Search](#).
2. To select the contact, click the contact link.

## 10.4.4 Maintaining Contact Details

Keeping contact details current is an important part of Oracle Sales Online functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

### Navigation

Customer > Contact

### Prerequisites

A contact must exist.

### Steps

1. You can search for a contact using [Using Quick Find or Advanced Search](#).
2. Click the relationship link in the summary table.

Contact details consist of the following areas:

- General Information
- Personal Addresses
- Product Interests
- Personal Interests
- Restrictions

3. To create a personal address, click the **Create Address** button.

4. To add product interest information, enter the required information directly into the summary table. This includes information about the products that the contact is interested in purchasing. Additional product interests can be added on the lines available on the table. Enter comments for each product interest.
5. To add personal interest information, enter the required information directly into the summary table. This includes personal information about the contact such as, entertainment, hobbies, or sports. Save your changes.
6. To add restrictions, enter information into the fields provided. You can select a Restriction Type, a Start and End Date for the restriction, the reason for the restriction and the Status of the contact. To remove a restriction, click the Erase icon. Save your changes.

Personal Addresses

View

Identifying	Address	Map It	Phone Book	Start Date	End Date	Status	Type	Primary
No records found matching the given criteria.								
<input type="button" value="Create Address"/>								

Product Interests

Remove	*Product	Comments
	Accessories/Docking Station	interested for office

Personal Interests

Remove	*Interest Type	*Interest Name	Comments
	Entertainment		

Restrictions

Erase	*Restriction Type	Start Date	End Date	Reason	Status
	E-mail	10-Dec-2002	31-Dec-2002		Inactive
					Active

7. Click **Update**.

## 10.4.5 Adding Classifications

You can add classifications to a contact.

### Navigation

Customer > Contact > Classification

### Prerequisites

Classifications must be set up from the Administration tab.

### Steps

1. Select a Class Category from the drop down list.  
The Class Category determines the Classification Codes you will be able to search on.
2. Select a Class Category status from the drop down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use percent sign (%) as a wild card.
5. Choose a code by checking the "Select" box.
6. Click the **Select** button.

## 10.4.6 Managing Contact Notes

### Navigation

Customer > Contact > Notes

### Prerequisites

None

### Steps

1. Search for a contact using [Using Quick Find or Advanced Search](#).
2. From the search results page, click the relationship link.

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

---

---

**Note:** Once a note is created, it cannot be updated.

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## 10.4.7 Creating a Contact Task

### Navigation

Customer > Contact

### Prerequisites

None

### Steps

1. Search for a contact using [Using Quick Find or Advanced Search](#).
2. From the search results, click the relationship link.
3. Click **Tasks**.
4. Click **Create**.  
The Create Task page opens.
5. Select Task Type from the drop down list.  
If the task is a private task, check the Private box.
6. Enter the Task Name.
7. Enter the Task Description.
8. Choose the Priority from the drop down list.
9. Select the Status from the drop down list.
10. Select a planned start date by clicking the calendar icon and selecting a date.

11. Optionally, select a planned start time and end time by selecting from the drop down lists.
12. Enter the name of the task owner, click **Go**.
13. Select a task owner by clicking the link from the list of search results.
14. Click **Create**.

## 10.4.8 Managing Contact Attachments

### Navigation

Customer > Contact

### Prerequisites

None

### Steps

1. Search for a contact using [Using Quick Find or Advanced Search](#).
2. From the search results, click the relationship link.
3. Click **Attachments**.
4. Click **Add**.  
The **Add Attachment** page opens.
5. Enter a description, click **Text**, **File**, or **URL**.
6. Enter Text, click Browse to search for the document, or enter the URL.
7. Click **Create**.

## 10.4.9 Managing Contact Interactions

### Navigation

Customer > Contact > Interactions

### Prerequisites

None

**Steps**

1. Search for a contact using [Using Quick Find or Advanced Search](#).
2. To select the relationship details, click the relationship link.
3. Click **Interactions**.
4. Click a link to view details.

## 10.4.10 Sending Collateral from the Contact Summary Table

**Navigation**

Customer > Contact

**Steps**

Follow these steps to send collateral:

1. Check the contact's Collateral Recipient box to send collateral to the contact or use the **Select All** button to send collateral to all contacts on the summary table.
2. Click **Send Collateral**.
3. Complete the fulfillment request.

## 10.5 Contact List Subtab

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

There are two ways to create a contact list:

- [Section 10.5.1, "Creating a Contact List Using Filters"](#)
- [Section 10.5.2, "Creating a Contact List by Manually Adding Contacts"](#)

You can also perform the following functions from the Contact List subtab:

- [Section 10.5.3, "Updating Contact, Customer, and Relationship Details"](#)
- [Section 10.5.4, "Saving a Contact List"](#)
- [Section 10.5.5, "Downloading a Contact List"](#)
- [Section 10.5.6, "Personalizing the Summary Table Display"](#)
- [Section 10.5.7, "Adding Additional Filters to a Contact List"](#)
- [Section 10.5.8, "Viewing List Filters"](#)
- [Section 10.5.9, "Manually Add a Contact to a List"](#)
- [Section 10.5.10, "Removing a Contact From a List"](#)
- [Section 10.5.11, "Removing a List"](#)
- [Section 10.5.12, "Call Sheet Overview"](#)
- [Section 10.5.13, "Generating a Call Sheet"](#)
- [Section 10.5.14, "Viewing Call Sheet Details"](#)
- [Section 10.5.15, "Sorting a Call Sheet"](#)
- [Section 10.5.16, "Selecting Multiple Contacts"](#)
- [Section 10.5.17, "Adding a Task"](#)
- [Section 10.5.18, "Sending Collateral"](#)
- [Section 10.5.19, "Viewing Calendar Tasks"](#)

### Related Profiles

**OSO: Create a list with filter conditions:** The site level default value is "No", which means that a contact list will be created manually by default. You can edit this profile from the Profiles > Customer.

### See Also

[Section 3.5, "Setting Profiles"](#) on page 3-12

## 10.5.1 Creating a Contact List Using Filters

Use the following procedure to create a contact list using filters.

### Navigation

Customer > Contact List

### Prerequisites

User must have access to existing contacts.

### Steps

1. Click **Create Contact List**.
2. Enter the list's name.
3. Select the Public or Private radio button to indicate whether you want to create a private list or a public list that can be accessed by others.
4. Select the "Use Filters to Find Contacts" radio button.
5. Click **Create**.

This takes you to the filters section where you can enter certain criteria to create the contact list. The "List of Filters" page opens.

Use the following filter categories:

- a. **Contact** includes:
  - **General:** General information about the contact such as, name, date of birth, phone number.
  - **Relationship:** Information about the contacts relationships such as relationship type, role type, department.
  - **Address:** Contacts address such as city, state, country, or address status.

- b. Classification:** Information about the classification category that the contact has been identified as belonging to.
6. After you have selected the filters that you want to choose, click **Apply Filter**.  
If you want to clear the filters you have selected, click **Restore**. To quit creating the list and return to the List Summary Page, click **Cancel**. Please note, once you have applied a set of filters to create a list, you cannot refresh this list. You can still apply more filters on this list though. In addition, sales team filters will only appear when you are creating a list from scratch.
7. A list using the filters you have selected is returned.

## 10.5.2 Creating a Contact List by Manually Adding Contacts

Use the following procedure to create a contact list by manually adding contacts.

### Navigation

Customer > Contact List

### Prerequisites

User must have access to existing contacts.

### Steps

1. Click **Create Contact List**.  
A contact list page with no contacts opens. You can manually add contacts to the list here.
2. Select the "Manually Add Contacts" radio button.
3. Enter a name that will be used to identify this list.
4. Click **Create**.
5. In the "Add a Contact" field, enter the full or partial contact name using percent sign (%) as a wildcard.
6. Click **Go**.
7. From the search results, select the contact you want to add to the list.
8. Click **Select**.
9. Click **Save**.

### 10.5.3 Updating Contact, Customer, and Relationship Details

#### Navigation

Customer > Contact List

#### Steps

Select the information that you want to update by clicking the related link. For example, to update the Contact details, click the link in the Contact column.

Save your changes.

### 10.5.4 Saving a Contact List

#### Navigation

Customer > Contact List

#### Steps

After you have selected and applied the filters, you have a couple of options in saving the contact list, Save or Save As.

- If you want to save the file as it is, click **Save**.
- If you want to save the file under a different name, enter the name in the Save As text field. Click **Save**.

Additionally, you can indicate whether the list is a public or private list by selecting the Public or Private radio button. A private list can only be viewed by the list creator. A public list is viewable by any person who has access to the contacts on the list. However, a public list cannot be changed by another user.

When saving contact lists, please note that the contact lists that you create (either public or private) must have unique names. However, another user can create a public contact list with the same name as your contact list.

### 10.5.5 Downloading a Contact List

You can download a contact list to a spreadsheet by clicking the **Download to CSV**.

## 10.5.6 Personalizing the Summary Table Display

You can personalize the way the summary table is displayed on the page by clicking the Personalize icon.

### Navigation

Customer > Contact List

### Steps

1. Click the **Personalize** icon.  
The Personalize Contact List page opens.
2. Select the items you want to display on the page by moving Available Columns to the Display Columns area.
3. Select sorting options.
4. Enter the number of rows to display.
5. Click **Apply**.

## 10.5.7 Adding Additional Filters to a Contact List

After you have applied an initial set of filters and created a contact list, or you have created a contact list manually, you can add additional filters to the contact list to further narrow down the list.

### Navigation

Customer > Contact List

### Prerequisites

You must be the owner of the list in order to modify the list. If you are not the owner, the list you create will be a new list based on the existing list.

### Steps

1. Click **Apply Filters**.  
The "List of Filters" page opens. In the Filters section you can enter criteria to create the contact list.  
Use the following filter categories:
  - a. **Contact** includes:

- **General:** General information about the contact such as, name, date of birth, phone number.
  - **Relationship:** Information about the contacts relationships such as relationship type, role type, department.
  - **Address:** Contacts address such as city, state, country, or address status.
  - b. **Classification:** How all classifications you choose will be related to one another for the filter. How you want the classification criteria to be related to each other by selecting the "And Condition" or "Or Condition" radio button.
2. After you have selected the filters that you want to choose, click **Apply Filter**.
  3. If you want to clear the filters you have selected, click **Restore**. To quit adding filters to the list and return to the Contact List Page, click **Cancel**.

## 10.5.8 Viewing List Filters

You can view the filters you have applied to a list two ways.

- From the summary table your saved lists are displayed. Click the **View** link under the List Filters column.
- After you have created a new list, you can view the filters from the contact list page by clicking the **List Properties** link. The view-only page shows the filters that you used for the list and the date the filters were applied.

## 10.5.9 Manually Add a Contact to a List

After you have created a contact list, you can manually add contacts to the list.

### Navigation

Customer > Contact List

### Prerequisites

You must be the owner of the list.

### Steps

1. In the "Add a Contact" field, enter the name of the contact you want to add. Use the percent sign (%) as a wild card.
2. Click **Go**.

3. Select a contact from the search results.

## 10.5.10 Removing a Contact From a List

### Navigation

Customer > Contact List

To remove a contact from a list, open the list from the summary table. Check the Remove box and click **Update**.

## 10.5.11 Removing a List

### Navigation

Customer > Contact List

To remove an entire list from your summary table, check the Remove box. Click **Update**.

## 10.5.12 Call Sheet Overview

After you have created a list, you may want to generate a call sheet. A call sheet has additional information on your contacts which provides an interactive page.

### Overview

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in your Contact List. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

From the contact list:

- [Section 10.5.13, "Generating a Call Sheet"](#)
- [Section 10.5.14, "Viewing Call Sheet Details"](#)
- [Section 10.5.15, "Sorting a Call Sheet"](#)
- [Section 10.5.16, "Selecting Multiple Contacts"](#)
- [Section 10.5.17, "Adding a Task"](#)
- [Section 10.5.19, "Viewing Calendar Tasks"](#)
- [Section 10.5.20, "Updating Contact, Customer, and Relationship Details"](#)

## 10.5.13 Generating a Call Sheet

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. "Executing a Call Sheet" refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

### Prerequisites

None

### Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

### Steps

1. Select a contact list.
2. Click the **Generate Call Sheet** button.

The application will display information about the contacts. To remove contacts from the call sheet, check the "Remove" box and click **Update**.

## 10.5.14 Viewing Call Sheet Details

### Prerequisites

None

### Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

### Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

The details you see are described in the following table:

<b>Field</b>	<b>Description</b>
Select	To select the client for an action (send email, collateral, or add interaction), select the box.
Priority	Indicates the priority given to the client.
Client/Contact	The client or contact name.
Title	The contact title.
Phone	Phone number
Email	Email address
Primary Address	Address
Country	Country
Comments	Click <b>View All</b> to see all comments.
Calendar	Calendar

### 10.5.15 Sorting a Call Sheet

You can view the call sheet with the basic view which lists contacts grouped by client.

#### **Prerequisites**

None

#### **Navigation**

Customer > Contact List > Generate Call Sheet

#### **Steps**

This is the default view.

1. Select a contact list.
2. Click **Generate Call Sheet**.

## 10.5.16 Selecting Multiple Contacts

### Prerequisites

None

### Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

### Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. To select multiple clients, select each client by checking the Select box in the first column of the client's row on the call sheet.

You can also use the "Select All" link to select all contacts on the current page or "Select None" link to select none, links at the bottom of the page.

## 10.5.17 Adding a Task

### Prerequisites

None

### Navigation

Customer > Contact List > Generate Call Sheet

### Steps for Alternative 1

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Select the client by checking the Select box in the first column of the client's row on the call sheet.
4. From the drop down of the Select Client and Perform Action list, select Create Task.
5. Click **Go**.

6. Enter the information for the task you are creating. Most fields will default to match the settings you have already done. Required fields are indicated with an asterisk.
7. Click **Create**.

The **Create** and **Create Another** button commit changes in this window and forward this page to the Create Task and Task Summary page for you to create another task. Click Clear to undo what you have entered.

### **Steps for Alternative 2**

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click the Edit icon on the call sheet.

### **Steps for Alternative 3**

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click an icon on the weekly calendar on the call sheet.

## **10.5.18 Sending Collateral**

You can send collateral material from a call sheet.

### **Prerequisites**

None

### **Navigation**

Customer > Contact List > Generate Call Sheet

### **Steps**

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. From the drop down list, select "Send Collateral."
4. Check the "Select" box to indicate the contacts for which you want to send collateral.

5. Click **Go**.

## 10.5.19 Viewing Calendar Tasks

### Prerequisites

None

### Navigation

Customer > Contact List > Generate Call Sheet

### Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Tasks are listed in the far right column with a check mark. To view, edit, or add a task, click the check mark, double check mark, or cross mark.
4. The Create Task page opens. At the bottom of the page, all tasks are listed with a link to the details.

## 10.5.20 Updating Contact, Customer, and Relationship Details

### Navigation

Customer > Contact List > Call Sheet

### Steps

Select the information that you want to update by clicking the related link. For example, to update the Contact details, click the link in the Contact column.

Save your changes.

## 10.6 Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab. Available reports are listed below:

- [Section 10.6.1, "Viewing the Customer Classification Report"](#)
- [Section 10.6.2, "Viewing the Task Classification Report"](#)

### 10.6.1 Viewing the Customer Classification Report

This report will return all parties within the chosen party type that meet the classification criteria selected.

#### Navigation

Customer > Reports > Customer Classification Report

#### Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding P or C to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.
6. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
7. Select your sorting options from the available drop down lists.
8. Click **Run Report**.

## 10.6.2 Viewing the Task Classification Report

This report will return all parties within the chosen party type and tasks associated with those parties that meet the classification criteria selected.

### Navigation

Customer > Reports > Task Classification Report

### Steps

1. Select the Party Type from the drop down list. If you choose Person or Contact, click the corresponding "P" or "C" to display the correct fields.
2. Add a Class Category by selecting from the drop down list.
3. Enter a Code Name.
4. Click **Go**.
5. To remove a class from the current list, click the Remove icon.
6. Optionally, enter or select one or more of the following task filters:
  - a. Name
  - b. Number
  - c. Type
  - d. Date Range
  - e. Priority
  - f. Status
  - g. Include Private
7. Select the display options by moving the Available Columns to the Displayed Columns area with the ">" or "<" arrows.
8. Select your sorting options from the available drop down lists.
9. Click **Run Report**.



Sections in this chapter include:

- [Section 11.1, "Overview of the Partner Tab"](#)
- [Section 11.1.1, "Partner Overview"](#)
- [Section 11.1.2, "Creating a Partner"](#)
- [Section 11.1.3, "Creating a Person/Contact"](#)

## 11.1 Overview of the Partner Tab

The Partner tab is comprised of two subtabs, Partner and Contact. By default, the Partner tab opens to the Partner summary page. Click the Contacts subtab to open the Partner Contacts summary page. Use the Partner tab to create partners and subsequently associate them with sales opportunities.

It is not mandatory to install Oracle Partners Online in order to use the Partner tab within the Oracle Sales Online product.

Refer to the Oracle Partners Online documentation for more information about using partners functionality.

### 11.1.1 Partner Overview

A partner is any type of alliance or strategic agreement between one entity and another. From the Partner tab, you can create new partners and maintain the details of existing partners. Once a partner is created, it can be added to an external sales team.

There are three types of partners:

- **Exchange Partners:** Exchange Partners can participate in the opportunity exchange system between multiple parties, which can be vendors and partners. Two or more companies using the application can exchange/share opportunity information via the internet. This is the co-selling model.

(A vendor is the selling company using this application. For example, if Oracle was selling to end customer X via Partner Y, Oracle would be the vendor, Y would be the partner and X would be the end customer).

- **Sales Partners:** A Sales Partner has a specific partner agreement that allows the vendor to pass a sales deal to that partner using Oracle Partners Online (POL).
- **General Partners:** General Partners are any parties in the CRM modules that have a partner relationship with another organization or person. (General Partners include Sales and Exchange Partners. i.e. by definition Sales and Exchange Partners are also General Partners.)

### Reference

Please refer to the *Oracle Partners Online User Guide* guide for information.

## 11.1.2 Creating a Partner

This procedure is used when an organization does not yet exist. A different procedure will be used to create a partner relationship for an existing organization.

### Navigation

Partner

### Prerequisites

You must be associated with some internal organization. When you try to create a partnership, Oracle Sales Online creates the partnership with the internal organization that you are associated with.

### Related Profiles

The profile "PV: Default Vendor Organization" must be set to the internal organization that is created in the prerequisites section.

Additionally, bounce the application server after the profile is reset.

### Steps

Follow these steps to create a partner:

1. Create an internal organization by checking the "Internal" option on the organization detail page of the organization you want to be associated with. By default an organization is "External". This will be the organization that partners are created with for this user.
2. Click **Create**.  
The Create Partner page opens.
3. Enter information into required fields.
4. Optionally, enter additional information.
5. Click **Create**.

### Reference

Please refer to the *Oracle Partners Online User Guide* guide for information.

## 11.1.3 Creating a Person/Contact

Once a partner contact is created, this person can be added to the external sales team.

Follow these steps to create a person-to-organization relationship.

### Navigation

Navigate to the Partner's relationship page.

### Prerequisites

None

### Steps

1. To create a person-to-organization relationship, scroll down until the Person-to-Organization Relationships fields appears.
2. Click the **Add Relationship** button.  
The relationship page is displayed.

Go back to the Start

---

---

**Note:** Click the **Create Person** button to create a new person.

---

---

3. Select the person from the search results.

4. Choose the relationship type, such as "Employee of" or "Contact of."
5. Enter or select:
  - start date
  - person's job title
  - department, and other related information
6. Optionally, enter a note for the relationship.
7. Click **Create**.

To find more information about partners, please refer to the Oracle Partners Online documentation.

### **Reference**

Please refer to the *Oracle Partners Online User Guide* guide for information.

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## Compensation Tab

Sections in this chapter include:

- [Section 12.1, "Overview of the Compensation Tab"](#)

### 12.1 Overview of the Compensation Tab

The Oracle Incentive Compensation tab is divided into five subtabs: Year to Date Summary, Planning, Compensation Plan, Income Planer, and Reports.

Depending on your sales role, you can use the Compensation tab to perform the following functions:

- **Year to Date Summary:** This report is an overview of a salesperson's achievements, commission and bonus earnings and advances or draws. This report is the default page displayed when selecting the Compensation tab in Oracle Sales Online.

The figures are grouped by period and by plan element. The setup administrator can control which plan element appears as a quota or bonus category. The payout section is grouped by earnings type and by period.

- **Planning subtab:** The Planning subtab is separated into two areas: My Compensation Groups and Updating Quota Estimate.

**My Compensation Group:** A Compensation Group is a number of salespeople who share the same rollup relationship. This application displays a summary of the compensation groups where you are a member and those of your direct reports. Select the Compensation Group for which you wish to view details.

**My Quota Estimate:** My Quota Estimate contains information about the quota components: the compensation group, organization, sales role,

and effective dates of the sales role and hierarchy. This page allows the salesperson, to communicate to sales management what you think your new quota should be for the next compensation plan cycle. Your manager and your manager's manager have access to view your quota estimate and they can take your estimate into consideration when allocating your final quota to you.

- **Compensation Plan subtab:** The Compensation Plan subtab provide managers the ability to view the plans of their subordinates and distribute them for approval to their salespeople for compensation plan approval using automated workflows. The salespeople review their compensation plan information for a specified date range. Once the plan is reviewed, the salesperson can accept the plan. Click the link in the Sales Role column to view the Compensation Plan Detail.
- **Compensation Plan History:** This is a history of the compensation plan from creation to acceptance. This is not a history of actual commissions paid. The history displays each status, with the date and user. The status of compensation plans is sequential and is determined by user responsibilities.

The following is a brief summary of the statuses and the levels of user responsibility associated with them:

**Locked, Generated, Submitted:** These statuses can be generated by the Sales Force Planning Manager or the Financial Manager.

**Approved:** A Contract Approver can establish this status. This person would be someone setup as the designated approver.

**Issued:** The Sales Force Planning Manager or Financial Manager can distribute the compensation plan for online acceptance by individual sales representatives.

**Accepted:** Individual salespeople can accept the compensation plans that have been issued to them, online.

- **Income Planner subtab:** The Planning subtab enables a salesperson to calculate projected income based on estimated sales forecasts.
- **Reports subtab:** The Reports subtab enables the salesperson to view compensation reports by selecting the links under Report Name. The data from these reports are based on the Incentive Compensation calculations from processed orders and transaction in the Oracle Financial suite of products.

The following seeded reports are available:

**Year To Date Summary**

This report is an overview of a salesperson's achievements, commission, and bonus earnings and advances or draws. This report is the default page displayed when selecting the Compensation tab in Oracle Sales Online.

The figures are grouped by period and by plan element. The setup administrator can control which plan element appears as a quota or bonus category. The payout section is grouped by earnings type and by period.

This summary is also available when clicking the Year to Date Summary subtab.

**Quota Performance**

This report is a snapshot of sales achievement and earnings. Achievements are shown against interval-to-date quota and annual quota. Earnings total is broken down by period-to-date and interval-to-date.

**Commission Statement**

This report shows transaction details broken down by period for a salesperson.

**Reference**

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



Sections in this chapter include:

- [Section 13.1, "Overview of the Fulfillment Tab"](#)
- [Section 13.1.1, "Sending Collateral"](#)

## 13.1 Overview of the Fulfillment Tab

The Fulfillment tab provides the ability to send collateral to a selected list of people using the Fulfillment Wizard. You can send collateral to a person or contact at an organization, but not to the organization itself. The wizard walks you through the steps to select the list of predefined documents to be sent. A process is submitted to bundle the documents and send the collateral to each person by the selected output method.

### 13.1.1 Sending Collateral

There are two methods you can use to send collateral, select from [Steps for Alternative 1](#) or [Steps for Alternative 2](#).

#### **Navigation**

Fulfillment

#### **Prerequisites**

Collateral setup is completed in Oracle Marketing Online as deliverables before using Fulfillment in Oracle Sales Online. Fulfillment templates must be set up in Oracle Marketing Online. Please refer to the *Oracle Marketing Online User Guide* for more information on setting up fulfillment templates.

### Steps for Alternative 1

Follow these steps to send collateral:

1. Select the recipients to which you want to send collateral.
2. Click **Send Collateral**.  
The Fulfillment Wizard page opens.
3. Select a Template from the drop down list.
4. Click **Continue**.
5. Select a Master Document by checking the box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Select the Output Method (email) from the drop down list, and click **Continue**.  
The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop down list, and click **Done**.

### Steps for Alternative 2

Optionally, you can send collateral by following these steps.

1. From the **Fulfillment** tab, click the **Status** subtab.
2. Click **Create**.
3. Enter Person Search criteria, click **Search**.
4. Click **Send Collateral**.  
The Fulfillment Wizard page opens.
5. Select a Template from the drop down list.
6. Click **Continue**.
7. Select a Master Document by checking the box, click **Continue**.
8. Select Collateral, click **Continue**.
9. Select the Output Method (email) from the drop down list, and click **Continue**.  
The Fulfillment Request Confirmation page opens.
10. Select the Priority from the drop down list, and click **Done**.

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# Administration Tab

Sections in this chapter include:

- [Section 14.1, "Overview of the Administration Tab"](#)
- [Section 14.2, "General Administration"](#)
- [Section 14.3, "Sales Administration"](#)
- [Section 14.4, "Leads Administration"](#)
- [Section 14.5, "Resource Administration"](#)
- [Section 14.6, "Adding a Custom Report to Report Listings"](#)
- [Section 14.7, "Excluding Tabs and Functions"](#)
- [Section 14.8, "Turning "On" or "Off" Debug Information"](#)
- [Section 14.9, "Updating Job Title Type and Department Type LOV"](#)
- [Section 14.10, "Removing Items from the Inventory Items"](#)

## 14.1 Overview of the Administration Tab

The Administration tab consists of four subtabs; General, Sales, Resources, and Leads. With the Oracle Sales Administrator role, you have access to these tabs to edit information that influences the way the application works.

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

## 14.2 General Administration

General administration includes the Globalization section. See the following topics for information on setting up these functions.

- [Section 14.2.1, "Globalization"](#)

### 14.2.1 Globalization

You can manage the following items from the Globalization section:

- [Section 14.2.2, "Calendar Type"](#)
- [Section 14.2.3, "Accounting Calendar"](#)
- [Section 14.2.4, "Type Mapping"](#)
- [Section 14.2.6, "Period Rate"](#)
- [Section 14.2.7, "GL Daily Rate"](#)
- [Section 14.2.8, "Transaction Calendar"](#)

### 14.2.2 Calendar Type

#### Navigation

Administration > General > Globalization > Calendar Type

#### Steps

1. To search for calendar types:
  - a. Select a Year Type from the drop down list.
  - b. Enter a Period Type.
  - c. Click **Search**.
2. To create a new calendar type:
  - a. In the first blank Period Type field, enter the period type you want to create. This is a required field.
  - b. Enter the number of Periods Per Year (between 1 and 366 days). This is a required field.
  - c. Select a Year Type from the drop down list. This is a required field.

- d. Optionally, enter a Description.
3. Click **Update**.

## 14.2.3 Accounting Calendar

### Navigation

Administration > General > Globalization > Accounting Calendar

#### 14.2.3.1 Search for an Existing Accounting Calendar

##### Steps

To search for an existing Accounting Calendar:

1. Select a Calendar from the drop down list. This is a required field.
2. Enter a Period Name.
3. Enter a Start Date.
4. Enter an End Date.
5. Click **Search**.

#### 14.2.3.2 Create a New Accounting Calendar

A calendar for a new year should contain the period, quarter, and year, and there should be no missing days between periods.

To create a new accounting calendar:

1. Either click the **Create** button or in the first blank Prefix field, enter a prefix for the accounting calendar you want to create. This is a required field.
2. Select a Type from the drop down list. This is a required field.
3. Enter a Year. This is a required field.
4. Enter a Quarter. This is a required field.
5. Enter a Number. This is a required field.
6. Select a From and To Date by clicking the Calendar icon. These are required fields.
7. Enter an calendar name.

8. Click **Create** from the create accounting calendar page OR if you created the calendar on the summary page, click **Update**.

**Note:** The number is validated against Periods Per Year for the period type defined in Calendar Type.

## 14.2.4 Type Mapping

### Navigation

Administration > General > Globalization > Type Mapping

### Steps

1. Set the profile option "OS: Forecast Calendar" with a calendar name.
2. Select the calendar defined in the previous profile option "OS: Forecast Calendar."

## 14.2.5 Create a New Type Mapping

To create a new type mapping:

1. In the first blank Period Type field, select a period type from which you want to set the conversion rates from the drop down list. This is a required field. Make sure that the calendar you are using is the forecast calendar.
2. Select the Conversion Type from the drop down list. This is a required field.
3. Enter a Description.
  - e. Check the Updatable and Deletable if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).

## 14.2.6 Period Rate

The currencies used for this application must be set up with the conversion rates for each period. The exchange rate should be entered for the smallest period type used by your company, i.e., day, week, month. Enter the exchange rate value for each of the currencies needed.

The Period Rate and GL Daily Rate page is used to enter and display the conversion rates for a specific period or for specific currencies.

## Navigation

Administration > General > Globalization > Period Rate

## Steps

The Pseudo Period Rates page opens.

1. To search for Pseudo Period Rates:
  - a. Select a Calendar from the drop down list.
  - b. Enter the full or partial name of the Period Name, using percent sign (%) as a wildcard, click **Go**.
  - c. Select a Start or End Date under the Mapping Date.
  - d. Click **Search**.
2. To create a new period rate:
  - a. On the first blank Period Name line, enter a full or partial period name, using percent sign (%) as a wildcard. Click **Go**. This is a required field.
  - b. Select the currency you want to convert From from the drop down list. This is a required field.
  - c. Select the currency you want to convert To from the drop down list. This is a required field.
  - d. Conversion Type is automatically populated from Period Name list of values in a previous step.
  - e. Enter the rate in the Rate field.
  - f. The Updatable and Deletable 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**.

### 14.2.7 GL Daily Rate

The currencies used for this application must be set up with the conversion rates for each period. The exchange rate should be entered for the smallest period type used by your company, i.e., day, week, month. Enter the exchange rate value for each of the currencies needed.

The Period Rate and GL Daily Rate page is used to enter and display the conversion rates for a specific period or for specific currencies.

## Navigation

Administration > General > Globalization > GL Daily Rate

## Steps

The GL Daily Rate page opens.

1. To search for a GL Daily Rate:
  - a. Select a From Currency from the drop down list.
  - b. Select a To Currency from the drop down list.
  - c. Select a Conversion Date by clicking the Calendar icon.
  - d. Select a Conversion Type from the drop down list.
  - e. Click **Search**.
2. To create a new daily rate:
  - a. Select the first blank From Currency field and choose the currency you are converting from the drop down list. This is a required field.
  - b. In the To Currency field, select the currency you want to convert to from the drop down list. This is a required field.
  - c. Click the Calendar icon to select a Conversion Date. This is a required field.
  - d. Select a Conversion Type from the drop down list. This is a required field.
  - e. Enter the Conversion Rate in the field provided. This is a required field. The Inverse Conversion Rate is calculated and provided automatically.

If the profile "Daily Rates Window: Enforce Inverse Relationship During Entry" is set to Yes, the application ensures that the conversion rate and the inverse conversion rate always have an inverse relationship. If either rate is changed, the application automatically recalculates the other as the inverse of the changed rate. If the profile option is set to No, then the application will not enforce the inverse relationship. You can change either of the rates independently.
  - f. Click the Enter by Date Range button which allows you to enter conversions for a date range.
3. Click **Update**.

## 14.2.8 Transaction Calendar

Use the following steps to set up the transaction calendar.

### Navigation

Administration > General > Globalization > Transaction Calendar

#### 14.2.8.1 Find an Existing Transaction Calendar

Use the name or description of the calendar in the appropriate field. Click **Go**.

#### 14.2.8.2 Create a New Transaction Calendar

##### Steps

1. Enter the name for the new transaction calendar into the Name field .
2. Enter a description to identify the use of the calendar.
3. Select the days you want to include in the transaction calendar based on your business needs.
4. Click **Update**.

#### 14.2.8.3 View Transaction Calendar Details

##### Steps

1. [Find an Existing Transaction Calendar](#) OR click the name of the transaction calendar.
2. Update details such as, changing a specific date to be included in or excluded from the transaction calendar. You can identify the date by finding the specific date and selecting or de-selecting the box associated with that date.
3. Click **Update**.

## 14.3 Sales Administration

Sales administration includes the topics related to sales functionality.

- [Section 14.3.1, "Menu Administration"](#)
- [Section 14.3.6, "Home Page"](#)
- [Section 14.3.10, "Sales Category"](#)

- [Section 14.3.15, "Call Center"](#)
- [Section 14.3.16, "Opportunity"](#)
- [Section 14.3.21, "Forecast"](#)
- [Section 14.3.25, "Accesses"](#)

## 14.3.1 Menu Administration

The Menu Administration page is used to organize the side panel navigation menus for Oracle Sales Online. By re-sequencing menus, creating parent/child menus, and re-naming menus, you can organize the side panel navigation to your preferences.

- [Section 14.3.2, "Resequence Side Panel Navigation Menus"](#)
- [Section 14.3.3, "Change the Menu Name"](#)
- [Section 14.3.4, "Create a Parent Menu"](#)
- [Section 14.3.5, "Create Your Own Menu"](#)

### Navigation

Administration > Sales > Menu Administration

The Side Navigation page opens.

**Menu Administration**

[Home Page](#)  
[Home Page Bins](#)  
[External Tools](#)  
[Home Page](#)  
[Message](#)

[Sales Category](#)  
[Interest Type](#)  
[Interest Code](#)  
[Interest Status](#)  
[Plan Element](#)  
[Mapping](#)

[Call Center](#)  
[Campaign](#)  
[Assignments](#)  
[Agent Assignments](#)  
[Web Assistance](#)  
[Outcome](#)  
[Assignments](#)

### Side Navigation

Menu Name

Remove	*Sequence	*Attribute	*Attribute Text	*Function Name	Go	Parent Attribute	Seeded
	<input type="text" value="10"/>	MAIN	<input type="text" value="General"/>	<input type="text" value="ASF_ACCOUNT_I"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	✓
	<input type="text" value="20"/>	SITES	<input type="text" value="Sites"/>	<input type="text" value="ASF_ACCNT_SIT"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	✓
	<input type="text" value="30"/>	ROLES	<input type="text" value="Roles"/>	<input type="text" value="ASF_ACCOUNT_I"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	✓
	<input type="text" value="40"/>	RELAT	<input type="text" value="Relationships"/>	<input type="text" value="ASF_ACCNT_REL"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	✓
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Go"/>	<input type="text" value=""/>	

\* Indicates required field.

## 14.3.2 Resequence Side Panel Navigation Menus

You can use this feature to re-organize your side panel navigation menus.

### Steps

1. Select a Menu Name from the drop down list.
2. Click **Go**.
3. In the Sequence field enter the number that represents the sequence in which you want that menu to be displayed. For example, if you want Account menu to display first, you may enter the sequence number as 10. In this example, if you wanted to add a menu before or after the Account menu, you would enter a menu with the number 5 or 15.
4. Click **Update**.

## 14.3.3 Change the Menu Name

You can use this feature to change the names of menus.

### Steps

1. Select a Menu Name from the drop down list.
2. Click **Go**.
3. Enter the new menu name in the Attribute Text field.

For seeded menus, it is recommended that you do not change the Function Name.

4. Click **Update**.

## 14.3.4 Create a Parent Menu

You can use this feature to create parent menus. For example, if you want Classifications to become a parent menu of Relationships, indicate the parent and child menu relationship here.

### Steps

1. Select a Menu Name for which you want to create a parent menu for from the drop down list.
2. Click **Go**.

3. Select the parent menu from the Parent Attribute drop down list. This parent attribute will become the parent menu of the menu you previously selected.
4. Click **Update**.

### 14.3.5 Create Your Own Menu

#### Steps

1. On the first blank line of the Menu Administration page, enter a Sequence number for the menu to appear in the side navigation panel. For example, if you have Menu A in sequence number 15 and Menu B in sequence number 20, you can fit Menu C in between A and B by entering 16 in the Sequence field.
2. Enter an attribute in the Attribute Field.
3. Enter the menu name that you want to display in the Attribute Text field.  
For seeded menus, it is recommended that you do not change the Function Name.
4. If you want this menu to be a child menu, select the parent menu from the Parent Attribute drop down list.
5. Click **Update**.

### 14.3.6 Home Page

Use these tools to manage home page information:

- [Section 14.3.7, "Setting Up Home Page Bins Accessibility"](#)
- [Section 14.3.8, "External Tools"](#)
- [Section 14.3.9, "Home Page Message"](#)

### 14.3.7 Setting Up Home Page Bins Accessibility

The home page displays selected bins, or snapshots, of information within the application. You can manage which responsibility has access to which bins through the Home Page Bins link from the Administration tab.

#### Navigation

Administration > Sales > Home Page > Home Page Bins

## Steps

1. The Home Page Bins Administration page opens.
2. Select the Application from the drop down list.
3. Select the Responsibility for which you want to give bin access from the drop down list.
4. Click **Search**.
5. Restrict access to the bin by checking the Disable box.

Permitting access to a bin means that you did not check the Disable box.

### Home Page Bins Administration

Application

Responsibility

Disable	Application	Bin Name	Bin Description
<input type="checkbox"/>	Oracle Sales Compensation	Top Performers	Shows top performing salesreps
<input type="checkbox"/>	Oracle Field Sales	New Leads	This bin provides a count and amount of leads assigned to the user per period rolling up to a s
<input type="checkbox"/>	Oracle Field Sales	Opportunity by Close Date	This chart gives the ability to graph the open opportunities by close date
<input type="checkbox"/>	Oracle Field Sales	Opportunity by Status	This chart gives the ability to graph the opportunities by status
<input type="checkbox"/>	Oracle Field Sales	Opportunity by Win Probability	This chart gives the ability to graph the open opportunities by win probability
<input type="checkbox"/>	Oracle Field Sales	Leads	This chart gives the sales person the ability to graph new leads
<input type="checkbox"/>	Oracle Field Sales	Forecast History - Self	This chart gives the ability to graph the submitted forecast numbers for a sales person

6. Click **Update**.

## 14.3.8 External Tools

Oracle Sales Online can provide links to external sites (HTML and jsp only) as well as ERP applications. You may only link to self-service functions or functions which call HTML or jsp pages.








### 14.3.8.1 Setting Up Links to External Sites

#### Navigation

Administration > Sales > Home Page > External Tools

## External Tools Administration

Update Restore

Remove	*Category	*Link Text	*Link	*Link Type	*Description	Enabled	Seeded
	Self Service Applications	Project Listing	PA_PROJ_LIST	Function	Use this link to view all projec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Self Service Applications	The Dun & Bradstreet Compar	HZ_PARTY_SEARCH	Function	Search for company details ir	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Self Service Applications	Active Expense Reports	OIE_ACTIVE_EXPENSE_REPO	Function	Expense reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Self Service Applications	Travel Reservations	http://www.etravel.com	URL	Use this link to do travel reser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Collaboration	Meeting	http://meeting.oracle.com	URL	Use this link for collaborative :	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				URL		<input type="checkbox"/>	
				URL		<input type="checkbox"/>	

Previous [Next](#)

Update Restore

## Steps

- Enter the following required fields:
  - Category
  - Link text: This text will show on the page.
  - Link type (e.g., for a URL, http://www.oracle.com)
  - Description
- Set the Link Type to URL from the drop down list.
- Check the Enabled box.
- Click **Update**.

### 14.3.8.2 Setting Up Links to ERP Applications

## Navigation

Administration > Sales > Home Page > External Tools

## Steps

- Enter the following required fields:
  - Category

- Link text
  - Link URL (should be the function name of the ERP application page)
  - Description of this function
2. Choose Function in the Link Type drop down list.
  3. Check the Enabled box.
  4. Click **Update**.

You can access ERP applications if your responsibility level allows access to that application. In order to specify the responsibility for a user, in the FORMS application, choose "System Administrator" responsibility, then Security > Use > Define. Query on the user name and add in the responsibility and application name if they are not listed there.

Bounce the server after making any changes to the tools administration.

### 14.3.9 Home Page Message

Create or edit the message that is displayed in the upper right section of the home page. This message can be customized using HTML tags.

#### Navigation

Administration > Sales > Home Page > Home Page Message

#### Steps

1. Enter a new message in the text box.  
You can use HTML to customize the message.
2. Click **Update**.

### 14.3.10 Sales Category

Use the following information to manage the sales category section:

- [Section 14.3.11, "Interest Types"](#)
- [Section 14.3.12, "Interest Codes"](#)
- [Section 14.3.13, "Interest Status"](#)
- [Section 14.3.14, "Plan Element Mapping"](#)

## 14.3.11 Interest Types

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

The Interest Type classification has three layers:

- Interest Type
  - Primary Interest Type
  - Secondary Interest Code

### Navigation

Administration > Sales > Sales Category > Interest Types

- [Search for an Interest Type](#)
- [Create a New Interest Type](#)

#### 14.3.11.1 Search for an Interest Type

##### Steps

1. Select a Type from the drop down list.
2. Enter a Description.
3. Check all applicable boxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).
4. Click **Search**.

#### 14.3.11.2 Create a New Interest Type

##### Steps

1. Select the first blank Type field and enter the name of the new interest type. This is a required field.
2. Optionally, enter a description.
3. Select all applicable boxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled).

Oracle Sales Online does not use interest types to classify customers. Oracle Sales Online uses the Trading Community Architecture (TCA) Customer Classification lookup.

4. Check 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.

5. Click **Update**.

You cannot delete interest types because an interest type may be related to transaction records.

---

---

**Note:** If an interest type is changed, the refresh AS\_Sales\_credits\_denorm must be run before running the Initial Build of Opportunity and Lead bin and the Initial Load for Opportunity Reports concurrent program. Changes are reflected after this process is complete.

---

---

## 14.3.12 Interest Codes

For every interest type you can have two levels of interest codes: primary and secondary.

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

Use the following procedure to modify and create Interest Codes.

### Navigation

Administration > Sales > Sales Category > Interest Code

- [Search for an Interest Code](#)
- [Create a New Interest Code](#)

#### 14.3.12.1 Search for an Interest Code

##### Steps

1. Select an Interest Type from the drop down list.
2. Click **Search**.

#### 14.3.12.2 Create a New Interest Code

##### Steps

1. Enter the interest code for the Interest Type you want to set up. This is a required field.
2. Enter a description.
3. Check the Enabled box, if applicable.
4. Click **Update**.

### 14.3.13 Interest Status

#### Navigation

Administration > Sales > Sales Category > Interest Status

#### 14.3.13.1 Search for an Interest Status

##### Steps

1. Select a **Type** from the drop down list.
2. Enter a **Description**.
3. Check all applicable boxes to indicate where the classification is to be used (Account Classification, Person Interest, Lead/Opportunity Classification, Expected Purchase, Globally Enabled, Enabled by Organization).
4. Click **Search**.

## 14.3.14 Plan Element Mapping

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

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

Plan element mapping is required for using Income Planner.

### Navigation

Administration > Sales > Sales Category > Plan Element Mapping

- [Search for a Plan Element Mapping](#)
- [Create a New Plan Element Mapping](#)

### 14.3.14.1 Search for a Plan Element Mapping

#### Steps

1. Enter the plan element.
2. Select the mapping type from the drop down list.
3. Click **Search**.

### 14.3.14.2 Create a New Plan Element Mapping

#### Steps

1. Select the first blank Plan Element field and select the plan element you want to map from the drop down list. This is a required field.
2. From the second column, select the Mapping Type from the drop down list. This is a required field.
  - \* Map quota to primary interest code - if you want to map the plan element to a primary code.
  - \* Map quota to secondary interest code - if you want to map the plan element to a secondary code.
  - \* Map quota to interests type - if you want to map the plan element to an interest type.

3. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.
4. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using percent sign (%) as a wildcard, and click Go.
5. Click **Update**.

### 14.3.15 Call Center

The Call Center is used for Oracle TeleSales. For more information on Oracle TeleSales, please refer to the *Oracle TeleSales Implementation Guide* and *Oracle TeleSales User Guide*.

Some of the available functions are:

- Campaign Assignments
- Agent Assignments
- Web Assistance

### 14.3.16 Opportunity

In this section values are defined for the opportunity win probabilities, sales stages, status, and sales methodologies. The active values are displayed in the corresponding fields on the opportunity detail page.

The Win Probability setup page includes the probability percentage, meaning, effective dates and an active flag.

The Sales Stage setup page shows the sales stage name, description, the range of win probabilities for the sales stage, effective dates and an active flag. Depending on a profile option, the application can require the win probability to be within the range defined for the sales stage.

The Opportunity Status page display a summary list of the status codes, meaning and description, along with a detail page where you select attributes for the status.

The Sales Methodology page defines the sales stages to be included in the methodology, the sequence of the sales stages, the win probability range and the task template to use. The win probability range within a methodology overrides the range for an independent sales stage.

#### See Also

- [Section 14.3.17, "Win Probability"](#)

- [Section 14.3.18, "Sales Stage"](#)
- [Section 14.3.19, "Status Code"](#)
- [Section 14.3.20, "Sales Methodology"](#)

## 14.3.17 Win Probability

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

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

- [Find and Modify a Win Probability](#)
- [Enter a New Probability](#)

### 14.3.17.1 Find and Modify a Win Probability

Use the following procedure to define or modify Win Probabilities.

#### Navigation

Administration > Sales > Opportunity > Win Probability

#### Steps

1. Enter the win probability number in the Win Probability field.
2. Optionally, enter the Meaning.
3. Click **Search**.

### 14.3.17.2 Enter a New Probability

Use the following procedure to define or modify Win Probabilities.

#### Navigation

Administration > Sales > Opportunity > Win Probability

#### Steps

1. Click in a **Win Probability** field in a new row. This is a required field.

2. Enter a Value between 0 and 100.
3. Enter or change the information in the **Meaning** field.
4. Select a Start Date in the **From** field by clicking the Calendar icon. This is a required field.
5. Optionally, enter an End Date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
6. Check the "Enabled" box to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the page.
7. Click **Update**.

## 14.3.18 Sales Stage

A set of pre-defined Sales Stages is included with this application. You may choose not to use the pre-defined set and create customized sales stages of your own. Or, you can use a combination of the pre-defined set with additional customized Sales Stages.

- [Find an Existing Sales Stage](#)
- [Enter a New Sales Stage](#)

### 14.3.18.1 Find an Existing Sales Stage

Use the following procedure to define or modify Sales Stages.

#### Navigation

Administration > Sales > Opportunity > Sales Stage

#### Steps

1. Enter the sales stage name in the Name field.
2. Optionally, enter a Description.
3. Click **Search**.

### 14.3.18.2 Enter a New Sales Stage

Use the following procedure to define or modify Sales Stages.

## Navigation

Administration > Sales > Opportunity > Sales Stage

## Steps

1. Click in a Name field in a new row. This is a required field.
2. Enter a description
3. Enter a minimum and a maximum win probability value for this stage in the Min and Max fields. These are required fields.
4. Select a start date in the From field by clicking the Calendar icon and choosing a date. This is a required field.
5. Optionally, select an end date for the To field. If an end date is selected, the Sales Stage will be disabled after that date.
6. Check the Enabled box to enable the Sales Stage. If the Enabled box is not checked, the Sales Stage will not be enabled.
7. Click **Update**.

## 14.3.19 Status Code

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

### 14.3.19.1 Search for a Status Code

Use the following procedure to define Opportunity Status.

## Navigation

Administration > Sales > Opportunity > Status Codes

## Steps

1. Enter the Status Code.
2. Enter the Meaning
3. Enter the Description.
4. Click **Search**.

### 14.3.19.2 Create a New Status Code

Use the following procedure to define Opportunity Status.

#### Navigation

Administration > Sales > Opportunity > Status Codes

#### Steps

1. Click **Create**.
2. Enter a Status Code.
3. Enter a Meaning.
4. Enter a Description.
5. Check the "Enabled" box to activate the opportunity status.
6. Check 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 closed and requires a close reason to be entered.
7. Select the Include in Forecast box to include the status in forecasts.
8. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate box in the Used For region.
9. The Win Loss Indicator region indicates whether the deal has been won, lost, or neither. If the open flag is unchecked, then the choices are won or lost.
10. Click **Create**.
11. Click **Update**.

### 14.3.20 Sales Methodology

Every time a sales representative has a potential opportunity, the sales representative follows a series of steps before closing the sale. This process is referred to as a Sales Methodology and the specific steps are referred to as Sales Stages. Each sales stage creates a set of tasks, mandatory or optional, to be performed by the sales representative in accordance with the Sales Methodology selected. However, a sales rep is not required to select a sales methodology if they choose not to and once a sales methodology is selected for an opportunity it cannot be changed.

The following list is the default Units of Measure (UOM) codes that, if used, the workflow calculates the planned end date. If not used, the planned end date and planned start date are the same as the system date:

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

If you use only these Unit of Measure codes, then you do not need to make any modifications. However, if you use any other Unit of Measure, then you must modify the CHECK\_DURATION procedure in the workflow package AS\_SALES\_METH\_WF to make sure that the start and end dates are correctly calculated. You can find this workflow package with the file name ASF/patch/115/sql/asxsmtws.pls (spec) and asxsmtwb.pls (body). Use the example in the file to make your change. If you do not make this modification, then the application does not calculate start and end dates. Instead, it creates a note informing you of the problem.

Profiles that govern behavior when using Sales Methodologies are; OS: Create Tasks Flag which can be used to disable automatic creation of tasks throughout the sales methodology work flow, and OS: Sales Methodology that can be used to set the default sales methodology at the site, application, or user level.

## Navigation

Administration > Sales > Opportunity > Sales Methodology

The Sales Methodology Summary page opens.

## Steps

1. Click **Create**.

The Sales Methodology Create page opens.

2. Enter a name for the sales methodology. This is a required field.
3. Enter a description. This is an optional field.
4. Select Effective From date by clicking the Calendar icon and choosing a date. This is a required field.

5. Select Effective To date by clicking the Calendar icon and choosing dates.
6. Enter the Sequence that with which you want the sales stage to follow. This is a required field.
7. Select a Sales Stage from the drop down list. This is a required field.
8. Optionally, select a Task Template Group from the drop down list.
9. Select a Minimum Win Probability from the drop down list. This is a required field.
10. Select a Maximum Win Probability from the drop down list. This is a required field.
11. Click **Create**.

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

### 14.3.21 Forecast

Forecast categories and forecast category mapping work together to build the list of interest types used in building forecasts, opportunity worksheets, and product category worksheets. Each forecast category can have a different list of interest types mapped to the selected category. Interest codes cannot be used in mapping a forecast category.

- [Section 14.3.22, "Forecast Category"](#)
- [Section 14.3.23, "Forecast Category Mapping"](#)
- [Section 14.3.24, "Budget/Revenue Entry"](#)

### 14.3.22 Forecast Category

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

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

- [Section 14.3.22.1, "Modify an Existing Forecast Category"](#)
- [Section 14.3.22.2, "Add a Forecast Category"](#)

### 14.3.22.1 Modify an Existing Forecast Category

#### Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

#### Steps

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

### 14.3.22.2 Add a Forecast Category

#### Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

#### Steps

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

## 14.3.23 Forecast Category Mapping

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

Use the following procedure to set up Forecast Categories.

### 14.3.23.1 Search for a Forecast Sales Category

#### Navigation

Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

### **Steps**

1. Select a Forecast Category Name from the drop down list.
2. Click **Search**.

### **14.3.23.2 Create a New Sales Category Value**

#### **Navigation**

Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

#### **Steps**

1. In the first blank Interest Type field, select an interest type from the drop down list. This is a required field.
2. Select a Start Date by clicking the Calendar icon. This is a required field.
3. Select an End Date by clicking the Calendar icon.
4. Click **Update**.

**Note:** You can forecast only when the forecast dates fall within the forecast category dates.

## **14.3.24 Budget/Revenue Entry**

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

Please note, salesperson number refers to resource number.

### **14.3.24.1 Search for an Existing Budget and Revenue Entry**

#### **Navigation**

Administration > Sales > Forecast > Budget/Revenue Entry

#### **Steps**

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

3. Select a Period Name from the drop down list. This is a required field.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.

#### 14.3.24.2 Enter New Budget and Revenue Amounts

##### Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

##### Steps

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

#### 14.3.24.3 Upload Data From a File

##### Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

##### Steps

1. Click the "**Click here to Upload a file to a database**" link.
2. Enter the file name with a directory path and file extension OR click **Browse** to retrieve the file name from a local drive.

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

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

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

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

**3. Click Upload.**

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

## 14.3.25 Accesses

- [Section 14.3.26, "Territory"](#)
- [Section 14.3.27, "Resource"](#)
- [Section 14.3.28, "Customer"](#)
- [Section 14.3.29, "Lead"](#)
- [Section 14.3.30, "Opportunity"](#)

## 14.3.26 Territory

### Navigation

Administration > Sales > Accesses > Territory

### Steps

1. Enter the territory for which you are searching. This is a required field.
2. Choose to display the Customer, Opportunities, or Leads by checking the box.
3. Click **Go**.

### 14.3.27 Resource

#### Navigation

Administration > Sales > Accesses > Resource

#### Steps

1. Enter the resource for which you are searching. This is a required field.
2. Choose to display the Customer, Opportunities, or Leads by checking the box.
3. Click **Go**.

### 14.3.28 Customer

Select a customer/address and click the Search button to see the resources assigned to the customer.

#### Navigation

Administration > Sales > Accesses > Customer

#### Steps

1. Enter the full or partial customer/address, using percent sign (%) as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the customer are displayed.

### 14.3.29 Lead

Select a lead and click the Search button to see the resources assigned to the lead.

#### Navigation

Administration > Sales > Accesses > Lead

#### Steps

1. Enter the full or partial lead name, using percent sign (%) as a wildcard. This is a required field.

2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the lead are displayed.

### 14.3.30 Opportunity

Select an opportunity and click the Search button to see the resources assigned to the opportunity

#### **Navigation**

Administration > Sales > Accesses > Opportunity

#### **Steps**

1. Enter the full or partial opportunity name, using percent sign (%) as a wildcard. This is a required field.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the opportunity are displayed.

## 14.4 Leads Administration

The Administration tab allows a system administrator to set up items that govern the way leads are handled in this application.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for information.

## 14.5 Resource Administration

The Administration tab allows a system administrator to set up items that govern the way resources such as, employees, groups, and roles are handled.

Refer to the *Oracle CRM Application Foundation Implementation Guide* for information.

## 14.6 Adding a Custom Report to Report Listings

Some reports are shipped as part of this product. They are listed under each tab under the Reports subtab in the Report Listing Pages. If you create a custom report and want it to display on the Reports subtab, follow these steps to add the report:

### Steps

1. Create a JSP for users to enter their search criteria. This page is called the ParameterPage. The page needs to have a filter section if saved query is needed for this particular report.
2. Create another JSP to show the report data. This page is called the ResultPage.
3. Create one FND function for each of those two pages. Add the ParameterPage's function under ASF\_XXXXX\_REPORTS menu. XXXXX may be "CUSTOMER", or "LEAD", and so on.
4. You can use function exclusions on responsibilities to control which responsibility cannot see which reports. For more details about how to exclude FND functions from some responsibilities, please refer to the CRM Foundation documentation.
5. If no saved query is used for this report, you can stop here. Otherwise, please continue to the next step.
6. Create a default saved query for that report. When you visit the ParameterPage for the first time, you will see seeded parameters based on this default saved query. This can be done by modifying a Java program and run it against customer's database.
7. Each report needs to have a unique query type. For example, you may choose to give your report a query type QTQT.
8. Register in AK the attribute of the name of this report type and put it in the region "ASF\_REPORT\_NAMES"
9. In JTA property manager, you will need to do the following things:
  - To create a new value (QTQT) for your report query type in the value set of the property "querytype.<xxx>reports." <xxx> can be customer, lead, forecast or opp.
  - To create a new value for your report query type in the value set of the property "querytype.reports" (same value as the previous one, QTQT.)

- To create a new JTA property called "querytype.QTQT.desc." And add the following values for this property.

```
sectionname$<sn>  
parameterpage$<pp>  
resultpage$<rp>  
tab$<t>  
name$<name>
```

<sn> is the section name of the filter section in ParameterPage.

<pp> is the FND function name of ParameterPage, defined in Step 3.

<rp> is the FND function name of ResultPage, defined in Step 3.

<t> is the tab function name to be highlighted for this query type, like ASF\_OPPORTUNITES.

<name> is the AK attribute name for the name of this report type.

10. Change oracle.apps.asf.util.ReportNameHash to reflect the changes in AK as well. This step will be obsolete after OSO Profile page has taken the new report registration method with JTA's Property Manager.

## 14.7 Excluding Tabs and Functions

Function security is the mechanism by which user access to applications functionality is controlled.

The Oracle Applications GUI-based architecture aggregates several related business functions into a single form. Because all users should not have access to every business function in a form, Oracle Applications provides the ability to identify pieces of applications logic as functions. When part of an application's functionality is identified as a function, it can be secured (i.e., included or excluded from a responsibility). This security is thoroughly described in the Oracle Applications System Administrator's Guide, Release 11i.

The goal of this topic is to give you a brief overview so that you understand the concept behind this action. Refer to the *Oracle Applications System Administrators's Guide*, Release 11i for more detailed information.

## Terms

**Function:** A function is a part of an application's functionality that is registered under a unique name for the purpose of assigning it to, or excluding it from, a responsibility.

**Menu:** A menu is a hierarchical arrangement of functions and menus of functions. Each responsibility has a menu assigned to it.

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

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

### 14.7.0.1 To exclude tabs in this application

#### Steps

1. Create a new menu.
2. Identify menus corresponding to the tabs or subtabs that you wish to exclude.
3. Save your work.

### 14.7.0.2 To prevent users from accessing specific functions in this application

#### Steps

1. Navigate to the responsibility that you want to update.
2. Identify the functions that you want to exclude by entering the name of the function.
3. Save your work.

### 14.7.0.3 To find function names

#### Steps

These instructions 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.

As a System Administrator, find a function name with the following steps:

1. Login to the application and navigate to the desired page.
2. Find the URL. The URL should be "http://...../<a file name, with .jsp>?.....".
3. Go to \$HTML\_TOP.
4. Open that file, and search for a line saying ....setFunctionName("<a function name>").

That is the function name for the page.

---

---

**Warning:** If this function is to be excluded, you must bounce the server in order for the changes to be reflected in the user interface. Also, if this page is accessible from hyperlinks or buttons, those hyperlinks or buttons will not function after the function is excluded. It is recommended that you test all pages from which this excluded page may be reached before excluding the function.

---

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#### Reference

Refer to the *Oracle Applications System Administrator's Guide* for complete information about function security.

## 14.8 Turning "On" or "Off" Debug Information

This feature is available to those providing application support. This section covers information that can provide useful debug information.

#### Responsibility

System Administrator

#### Navigation

Login to Oracle Sales Online

### Steps

1. Type `asfDiagPageMain.jsp` in the web browser address window to navigate to the required page.

The current setting for the profile "ASF\_PROFILE\_DEBUG\_MSG\_ON" is displayed at the top of the page.

2. The debug information can be set at the "User" level for the current user, or at the "Site" level. Check the "Enable Debug" boxes for the level(s) at which you want to turn on the debug information.

3. Click the **Submit** button.

To find the version of a Java class:

- Type the full Java class name, with package information, in **ClassName** box.
- Click the **Get RCS ID** button.

4. After you turn on the profile, you must log out and then log in again before the profile changes will take effect. The same rule applies when you turn the profile off.

Once the profile is turned on and you have completed the previous step, debug messages are displayed at the bottom of most pages.

To turn off the debug feature, un-select the "Enable Debug" box.

### Notes

- Turning on the profile may have an impact on the performance of the application. For this reason, it should be used only in specific situations as determined by your business needs.
- This page is not translated because it is not intended for end-users.

## 14.9 Updating Job Title Type and Department Type LOV

The following section includes instruction on how to update Job Title Type LOV and Department Type LOV that are located on the create contact page.

### Responsibility

System Administrator

### **Navigation**

Oracle Sales Setup > Lookup Codes > Receivables

### **Steps**

- Query Type = RESPONSIBILITY and add or disable the responsibility types needed.
- Query Type = DEPARTMENT\_TYPE and add or disable the responsibility types needed.

Save your changes.

## **14.10 Removing Items from the Inventory Items**

Please refer to the Oracle Inventory documentation for information about this topic.

# Part III

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## Appendixes

This part contains the following Appendixes:

- [Appendix A, "Oracle Sales Online Frequently Asked Questions"](#)
- [Appendix B, "Oracle Sales Online Seed Data"](#)



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## Oracle Sales Online Frequently Asked Questions

This appendix provides frequently asked questions and answers.

- Is it necessary to install iStore and iSupport to view the customer from the “360 Degree view”?
- How do we restrict the sales rep to view only the customers assigned to them?
- Where do you add a new relationship type to link up customer records?
- How do you modify the "Job Title" list of values under the person link?
- What are "Sales Teams"?
- What is "Full Access"?
- What is the functionality behind the "Keep Flag"?
- Can an assigning sales opportunity created in OTS be assigned to the appropriate sales person in OSO through territory manager?
- Cannot add sales reps to the sales team for an opportunity?
- Opportunity Tab: Why are we receiving "APP-45645: Close reason is missing" when setting Opportunity status to won?
- Customer Tab: Why are we receiving Security Access Failed error when accessing the Customer Tab?
- Opportunity Tab: Why are we receiving the following Java errors when going into the Opportunities Tab?
- Customer Tab: How do you create a new Competitor?

- Why are we receiving the following errors: "Unable to resolve resource Role or Group ID" and "Invalid Application ID" when logging in?
- What is HTML Quoting?
- Do I need to install Oracle iStore to use HTML Quoting?
- Why can't I see the Create button on the Quote tab?
- Why can't I see any items when trying to create a quote?
- Why do I get the 'Price not found' error when trying to add an item to the quote?
- When placing an order, on the final Review Order Details screen, why is there no 'Place Order' button?
- Why do I get the 'not a salesrep' error when I click on the Quote button?
- On the Price Agreement screen, why am I not able to see my Agreement?

## A.1 Frequently Asked Questions

### **Is it necessary to install iStore and iSupport to view the customer from the “360 Degree view”?**

Answer:

Yes. In order to have full functionality in the 360 degree view iStore and iSupport needs to be installed. If you are not using the quoting functionality in Field Sales you do not need to configure iStore and can have a shared install but you will need to apply the latest iStore patchset. You will need a full install of iSupport and will need to setup and apply the latest iSupport patches.

In future releases, the application will query directly from the iSupport tables so this configuration will no longer be necessary.

### **How do we restrict the sales rep to view only the customers assigned to them?**

Answer:

You need to setup territories in order for the sales rep to only see the customers assigned to them and opportunities created on that customer. There are different options.

For more information about Territory Management consult the *Oracle CRM Application Foundation User Guide* and *Oracle CRM Application Foundation Implementation Guide*.

### **Where do you add a new relationship type to link up customer records?**

Answer:

This is an AR lookup code, the lookup code is called PARTY\_RELATIONS\_TYPE.

In Oracle Sales Administrator responsibility navigate to:

Oracle Sales Setup > Lookup Codes > Receivables

Query Type = PARTY\_RELATIONS\_TYPE and add or disable the relationships types needed.

### **How do you modify the "Job Title" list of values under the person link?**

Answer:

This is another Oracle Accounts Receivable lookup code called RESPONSIBILITY.

With Oracle Sales Administrator responsibility navigate to:

1. Oracle Sales Setup > Lookup Codes > Receivables
2. Query Type = RESPONSIBILITY and add or disable the responsibility types needed.

### **What are "Sales Teams"?**

Answer:

Sales teams represent all of the salespeople and partners that have ownership of a specific customer or opportunity. Sales team members can have full or limited access (read only). Sales team members can be added manually or automatically using Territory Manager.

### **What is "Full Access"?**

Answer:

Full access to the opportunity means that the sales representative who created the opportunity can add other sales team members, assign sales credits and update the likelihood that an opportunity will succeed.

**What is the functionality behind the "Keep Flag"?**

Answer:

The Keep Flag is used so that when you run the Assign Territory Program, even if the sales rep does not match the criteria to be assigned that account, the program will not delete that access record. Only the person with "Full" access, not territory or prospect access, should be able to update the keep flag.

The Keep Flag ensures that the salesperson is kept on the sales team. This is especially true for sales team creator which is why there's a default profile option called "OS: Sales Team Creator Keep Flag" which can be set to automatically default for the creator.

To set the Keep Flag: Log onto OSO with Field Sales Super Responsibility > Open an existing Opportunity > Click the Sales Team Link > Add a Sales Rep > then the name appears added to the team, and then there is that Keep Flag box that can be checked or unchecked.

**Can an assigning sales opportunity created in OTS be assigned to the appropriate sales person in OSO through territory manager?**

Answer:

Sales opportunity is a shared schema between OTS and OSO. Therefore, as long as a sales rep (either tele agent or field sales) has the privilege to see an opportunity, the opportunity shows up when they login in.

Create a test. Add a field sales rep into the sales team of an opportunity from OTS. Log into OSO as that field sales rep and you can see that opportunity.

The Territory Assignment Program (from Sales Admin) is on top of CRM Foundation/Territory module that's program generate the access records which are based upon the territory definition (compared to the manual assignment mentioned above).

If proper territory definition has been setup, an opportunity can be shared between OTS and OSO.

**Cannot add sales reps to the sales team for an opportunity?**

Answer:

We are unable to add sales reps to the sales team in the Opportunity details -> Sales team screen.

Customer is able to search for the selected sales rep and the search returns the matching sales rep criteria.

After selecting the sales rep via the hotlink, it returns to Sales team form and states:

"No records found matching the given criteria."

Check to see if the seeded role Account Manager was disabled.

When the "Account Manager" was disabled I was not able to add a team member to an opportunity.

### **Opportunity Tab: Why are we receiving "APP-45645: Close reason is missing" when setting Opportunity status to won?**

Answer:

Set the OPP\_OPEN\_STATUS\_FLAG from the AS\_STATUSES\_VL view to 'Y'. This flag is set using the Oracle Sales Administrator responsibility. The navigation path is: Oracle Sales Setup->Opportunities->Status.

Query up the 'Won' status. To change the flag value check the Open box.

The OPP\_OPEN\_STATUS\_FLAG from the AS\_STATUSES\_VL view is set to 'N'.

The OPP\_OPEN\_STATUS\_FLAG determines if a status is for open opportunities. If it is set to 'N' then a closure code is required. If users do not supply this reason they will receive the APP-45645 error.

### **Customer Tab: Why are we receiving Security Access Failed error when accessing the Customer Tab?**

Answer:

Group Member Role for the Resource must be something other than Admin. Try using a role of Sales Manager.

According to the security rule, the login user who has Sales Role defined as ADMIN will not have privilege to create.

### **Opportunity Tab: Why are we receiving the following Java errors when going into the Opportunities Tab?**

```
Error: java.lang.NumberFormatException:Zero length BigInteger  
java.lang.NumberFormatException: Zero length BigInteger at  
java.lang.Throwable.(Compiled Code) at java.lang.Exception.(CompiledCode) at  
java.lang.RuntimeException.(Compiled Code) at  
java.lang.IllegalArgumentException.(Compiled Code) at  
java.lang.NumberFormatException.(Compiled Code) at  
java.math.BigInteger.(Compiled Code) at java.math.BigInteger.(Compiled Code)
```

```
atjava.math.BigDecimal.(Compiled Code)
atoracle.apps.asf.opportunity.OpportunitiesVO.init(Compiled Code)at
oracle.apps.asf.webbean.TableWebBean.retrieveData(Compiled Code) at
oracle.apps.asf.webbean.TableWebBean.retrieveData(Compiled Code)at
oracle.apps.asf.webbean.WebBeanHandler.retrieveData(Compiled Code) at
oa_html.asfOpptySumryMain._jspService(Compiled Code) at
oracle.jsp.runtime.HttpJsp.service(Compiled Code)at
oracle.jsp.app.JspApplication.dispatchRequest(Compiled Code) at
oracle.jsp.JspServlet.doDispatch(Compiled Code) at
oracle.jsp.JspServlet.service(Compiled Code)at
javax.servlet.http.HttpServlet.service(Compiled Code) at
org.apache.jserv.JServConnection.processRequest(Compiled Code) at
org.apache.jserv.JServConnection.run(Compiled Code)at
java.lang.Thread.run(Compiled Code)
```

Answer:

The profile 'OS: Maximum Roll Days for Converting Amount' should have a numeric value. Set this profile option to a value of '0' or higher to keep this from occurring.

### **Customer Tab: How do you create a new Competitor?**

Answer:

Follow these steps to create Competitors:

1. Create an internal organization under the Customer tab in Field Sales. Select the internal radio button.
2. Create another organization in Field Sales (who will be your competitor). Select the external radio button for this organization.
3. After creating the second organization who is to be the competitor, in the Customer Details page, click on the red Relationship link.
4. Put the name of the internal organization created into the add an organization field and click on go.
5. Select the hyperlink for desired internal organization.
6. Chose Competitor from the list of values (LOV) for Relationship.
7. Click **Update**.

**Why are we receiving the following errors: "Unable to resolve resource Role or Group ID" and "Invalid Application ID" when logging in?**

Answer:

In order to access the application, the user must be defined as a valid Sales Person. Please see Note: 135712.1 on the steps to setup a Sales Person for Field Sales.

**What is HTML Quoting?**

Answer:

The HTML Quoting feature in Oracle Field Sales allows sales representatives to create or manage quotes on a customer's behalf. Sales representatives can also submit the quote as an order if they have the permission to do so.

HTML Quoting enables companies to provide optimum customer service during the campaign and sales processes.

**Do I need to install Oracle iStore to use HTML Quoting?**

Answer:

Yes. Oracle iStore must be installed before using HTML Quoting.

HTML Quoting uses the iStore permissions, specialty stores, and shopping cart. You must setup at least one iStore specialty store with the products that you want the sales representatives to sell. The Quote tab in Field Sales will then access this specialty store.

**Why can't I see the Create button on the Quote tab?**

Answer:

The profile option OSO: Enable Quote is set to No. It must be set to Yes to enable quote creation.

**Why can't I see any items when trying to create a quote?**

Answer:

Verify if the iStore Search Concurrent programs have been run:

- iStore Section Search Refresh
- iStore Search Insert

These concurrent programs can be run from the iStore Administrator responsibility on the forms side.

**Why do I get the 'Price not found' error when trying to add an item to the quote?**

Answer:

You need to make sure that the IBE profile options that are listed in the HTML Quoting Implementation Guide have been set up at the Application level for Field Sales.

Some of the Profile options related to Pricing are:

IBE: Use Price list associated with Specialty Store

IBE: Pricing Event Before Shopping Cart

IBE: Pricing Event for Shopping Cart

IBE: Request Type to get a Price

**When placing an order, on the final Review Order Details screen, why is there no 'Place Order' button?**

Answer:

Please verify the following setup through the admin console in jtflogin:

- i) verify that the salesperson has been assigned the role, IBE\_SALESREP\_ROLE
- ii) make sure the IBE\_SALESREP\_ROLE role has the IBE\_CREATE\_ORDER permission assigned

If either of the above have not been setup, then you may have the following situation:

- On the Quote Detail page, you click on the Place Order button to place an order
- You will be taken thorough a series of pages with shipment and payment options to select
- However, on the final Review Order Details page, there will be no 'Place Order' button to submit the order

**Why do I get the 'not a salesrep' error when I click on the Quote button?**

Answer:

Please verify the following setup:

- verify that the salesperson has been assigned the role, IBE\_SALESREP\_ROLE, through the admin console

- verify that profile MO: Operating Unit is set correctly. Check at Site, Application, Responsibility, and User levels.

**On the Price Agreement screen, why am I not able to see my Agreement?**

Answer:

Only Agreements that use the Standard Price List are currently supported.



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## Oracle Sales Online Seed Data

This appendix lists the seed data available in the Vision database: profiles and lookups.

- [Section B.1, "Lookups"](#)
- [Section B.2, "System Profile Options"](#)

### B.1 Lookups

It includes lookups with three different levels of modification:

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

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

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**Note:** For release 11.5.6 and earlier, Look up values are cached in the middle tier and jserv needs to be bounced in order to see the changes right way in a drop down menu. Beginning with release 11.5.7, the cache can be cleared using JTF cache manager without bouncing the middle tier.

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## B.1.1 Table of Lookups

The following table lists lookups for the Sales Family of eBusiness Suite applications, their values or defaults, the areas they affect, and the access level.

**Table B-1**

App.	Lookup Type	Values	Affects	Level
	ASF_CHART_SERIES_COUNT		Number of series to show in a chart.	U
	ASF_CHART_VALUE_TYPES		Value type for Y axis in charts (Count/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) Issues (Scheme, Issue Group Types, Currency) Customer Classification (Class Category)	Contact list filters	
	BUDGET_STATUS	APPROVED (Approved) NOT_APPROVED (Not approved) PENDING (Pending)	Leads budget status	
	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Leads close reason	

App.	Lookup Type	Values	Affects	Level
	DECISION_TIMEFRAME	1-3 MONTHS 3-6 MONTHS 6-12 MONTHS MORE THAN 1 YEAR WITHIN 1 MONTH WITHIN 1 WEEK	Leads time frame	
	LEAD_CONTACT_ROLE	DECISION_MAKER (Decision maker) END_USER (End user)	Leads contact role	
	LINK_TYPE		Lookup for tools administration page.	
	PARTY_RELATIONS_TYPE	BENEFACTOR_OF (Benefactor of) BOARD_MEMBER_OF (Board member of) CONTACT_OF (Contact of) CUSTOMER_OF (Customer of) EMPLOYEE_OF (Employee of) STOCK_HOLDER_OF (Stock holder of)	Leads relationship type	

App.	Lookup Type	Values	Affects	Level
	PARTY_RELATIONS_TYPE (continued)	MEMBER_OF (Member) MOTHER_OF (Mother) OWNED_BY (Owned) PARENT_OF (Parent) PARTNER_OF (Partner) PAYFROM_OF (Alternate party to pay for a buyer) PAYTO_OF (Alternate payee name for the seller) PUBLISHER (Publisher) REFERENCE_FOR (Reference) _OF (Relative) REPAIR_DEPOT_PROVIDER_FOR (Repair depot provider) REPORTS_TO (Reports to) SELLER_FOR (Seller) SELLER_TO (Seller to) SHIPTO_OF (Alternate shipping party for the buyer) SIBLING_OF (Sibling) SISTER_OF (Sister) SON_OF (Son) SPOUSE_OF (Spouse) STOCK_HOLDER_OF (Stockholder) STUDENT_OF (Student) SUBSIDIARY_OF (Subsidiary) THIRD_PARTY_OF (Third party) UNCLE_OF (Uncle) VAD_OF (VAD of) VAR_OF (VAR of) VENDOR_OF (Vendor)		

App.	Lookup Type	Values	Affects	Level
	RANK_ID	1 (Cold lead) 2 (Low lead) 3 (Medium lead) 4 (Hot lead)	Lead rank	
	REJECT_REASON_CODE	ASSIGN_ERROR (Assign error) DUPLICATE (Duplicate) VACATION (Vacation)	Leads decline reason	
	SALES_CHANNEL	DIRECT (Direct) INDIRECT (Indirect)	Sales Channel	S
	STATUS_CODE	NEW (new) UNQUALIFIED (unqualified) QUALIFIED (qualified) ACCEPTED (accepted) LOSS (loss) DEAD_LEAD (dead lead) DECLINED (declined) CONVERTED_TO_OPPORTUNITY (lead converted to opportunity)	Lead status	
	VEHICLE_RESPONSE_CODE	EMAIL FAX LETTER PHONE USER VOICE_MESSAGES WEB	Lead response channel	
	RELATIONSHIP_TYPE	ALL (seeded value)	Accounts	
	TAX_CODE		Accounts	
	PAYMENT_TERM		Accounts	
AMS	AMS_EVENT_PAYMENT_STATUS		Events	
AR	ACCOUNT_STATUS		Accounts	

<b>App.</b>	<b>Lookup Type</b>	<b>Values</b>	<b>Affects</b>	<b>Level</b>
AR	ACCT_ROLE_TYPE		Accounts	
AR	ADDRESS_LABEL		eBusiness Center	
AR	CODE_STATUS		Persons, organizations, Accounts	
AR	COMMUNICATION_TYPE		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE	ADMINISTRATIVE_CONTACT_FOR (Administrative Contact For) BILL_PRESENTMENT_ADMIN (Bill Presentment System Administrator) BILL_PRESENTMENT_CSR (Bill Presentment System Customer Service Representative) BILL_PRESENTMENT_ORG_REP (Bill Presentment System Organization Representative) BILL_PRESENTMENT_SITE_ADMIN (Bill Presentment System Site Administrator) BILL_TO (Bill To) BUYING_CONTACT_FOR (Buying Contact For) CEO_OF (CEO) CFO_OF (CFO) CIO_OF (CIO) CONTACT (Contact) CORR (Correspondence) DEPT_HEAD (Department Head) DUN (Dunning) EXECUTIVE (Executive) KEY_DECISION_MAKER_FOR (Key Decision Maker) LEGAL (Legal) LEGAL_CONTACT_FOR (Legal Contact For)	Persons, organizations	E

App.	Lookup Type	Values	Affects	Level
AR	CONTACT_ROLE_TYPE (continued)	MARKET (Market) MIDDLE_MANAGER (Middle Manager) PRIMARY_CONTACT_FOR (Primary Contact For) RECEIVING_CONTACT_FOR (Receiving Contact For) SHIPPING_CONTACT_FOR (Shipping Contact For) SHIP_TO (Ship To) STMTS (Statement) STOCK_HOLDER_OF (Stock Holder) TECHNICAL_CONTACT_FOR (Technical Contact For)		
AR	CONTACT_TITLE	DR (Dr.) MISS (Miss) MR (Mr.) MRS (Mrs.) MS (Ms.) SIR (Sir)	Persons, organizations	E
AR	CONTACT_TYPE		Persons, organizations, events, collateral	
AR	COUNTRY		eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting	
AR	CREDIT_RATING		Persons, Organizations	
AR	CUSTOMER_CATEGORY	CUSTOMER (Customer) PROSPECT (Prospect)	Accounts. persons, organizations	E

App.	Lookup Type	Values	Affects	Level
AR	CUSTOMER_TYPE		eBusiness Center	
AR	DAY		eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue	
AR	DECISION_FACTOR_TYPE		Accounts, Opportunity Contacts	
AR	DECISION_PRIORITY_TYPE		Accounts	
AR	DEPARTMENT_TYPE	ACCOUNTING ADMINISTRATION CUSTOMER SERVICE DISTRIBUTION/LOGISTICS ENGINEERING FACILITIES HUMAN RESOURCES INFORMATION TECHNOLOGY LEGAL MANUFACTURING MARKETING MERCHANDISING OPERATIONS PURCHASING QUALITY ASSURANCE R&D (Research & Development) RISK ANALYSIS SALES TRAINING	Persons, organizations, lookup	U

App.	Lookup Type	Values	Affects	Level
AR	FOLLOW_UP		Opportunities, Universal Work Queue	
AR	FORM_NAME		eBusiness Center, persons, organizations, leads, quotes/orders, Universal Work Queue	
AR	INTEREST_TYPE	ENTERTAINMENT HOBBIES PREFERENCES SPORTS TRAITS	Leads, opportunities, lookup	E
AR	JOB_TITLE_CODE		Persons, Organizations	
AR	LANGUAGE	ENG (English) FRE (French) GER (German) ITA (Italian) SPA (Spanish)	Persons, organizations, opportunities, events, lookup, scripting	E
AR	MONTH		Lookup	
AR	NOTE_TYPE		eBusiness Center, leads, opportunities, events	
AR	OWNER_TABLE_NAME		Persons, organizations, opportunities, lookup	

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE	ADVERTISER (Advertiser) AFFILIATE_TO (Affiliate) AGREEMENT_SIGNER_OF (Party that signs agreement on behalf of another party) ASSOCIATE_OF (Associate of) AUNT (Aunt) BENEFACTOR_OF (Benefactor of) BENEFICIARY (Beneficiary) BILLER_AT (When an organization is registered biller) BILLER_FOR (Biller For) BILLTO_OF (Alternate billing party for the buyer) BILL_CONSOLIDATOR_AT (Bill consolidator at) BILL_CONSOLIDATOR_FOR (Bill Consolidator for) BILL_PRESENTER_FOR (Bill Presenter at) BILL_PUBLISHER_AT (Bill publisher at) BILL_PUBLISHER_FOR (Bill publisher for) BOARD_MEMBER_OF (Board Member) BROTHER_OF (Brother) BUSINESS_PARTNER_FOR (Business partner) CEO_OF (CEO) CFO_OF (CFO) CHANNEL_FOR (Channel) CHILD_OF (child of) CIO (CIO) COMPETITOR_OF (Competitor)	Persons, Organizations	

App.	Lookup Type	Values	Affects	Level
AR	PARTY_RELATIONS_TYPE (continued)	CONSULTANT_FOR (Consultant) CONTACT_OF (Contact) CONTAINS_MEMBER (Contains member) COUSIN_OF (Cousin) CUSTOMER_OF (Customer) DAUGHTER_OF (Daughter) DEPENDENT_OF (Dependent) DIVISION_OF DOMESTIC_PARTNER_OF (Domestic Partner) DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of) DOMESTIC_ULTIMATE_OF (Domestic Ultimate of) EMPLOYEE_OF (Employee) EMPLOYER_OF (Employer) FATHER_OF (Father of) FIELD_SERVICE_PROVIDER_FOR (Field Service provider) GENERAL_EMPLOYEE_OF (General Employee) GLOBAL_SUBSIDIARY_OF (Global subsidiary of) GLOBAL_ULTIMATE_OF (Global Ultimate of) GUARANTOR_FOR (Guarantor) GUARDIAN_OF (Guardian) HEADQUARTERS_OF (Headquarters of) KEY_DECISION_MAKER_FOR (Key decision maker) LEGAL_COUNSEL_FOR (Legal counsel for) MANAGER_OF (Manager_of)		

App.	Lookup Type	Values	Affects	Level
AR	PARTY_SITE_USE_CODE	ACK (Acknowledgments) ADMINISTERED_BY (Administered By) BILL_TO (Bill To) BOL (Bills of Lading) BUSINESS (Business) CM (Credit Memos) COLLATERAL_MAIL_TO (Collateral Mail To) CORR (Correspondence) CUSTOMER_REGION (Customer Region) DELIVER_TO (Deliver To) DRAWEE (Drawee) DUN (Dunning) GENERAL_MAIL_TO (General Mail) HEADQUARTERS_FOR (Headquarters for) HOME (Home) INCORPORATED_TO (Incorporated) INSTALL_AT (Install At) INV (Invoice) ISSUED_BY (Issued By) KEY_SITE (Key Site) LEGAL (Legal) LEGAL_ADDRESS_OF (Legal Address) LEGAL_RESIDENCE_OF (Legal Residence) MARKET (Market) MARK_FOR (Mark For) NOT_ALLOWED_INTO (Not Allowed Into) OFFER_TO (Offer to)	Persons, Organizations	

<b>App.</b>	<b>Lookup Type</b>	<b>Values</b>	<b>Affects</b>	<b>Level</b>
AR	PARTY_SITE_USE_CODE (continued)	OTHER (Other) PAYMENT_WILL_BE_MADE_BY (Be Made By) PAY_TO (Pay To) REPLY_TO (Reply To) REPORT_TO (Report To) RESIDES_AT (Resides At) SHIP_FROM (Ship From) SHIP TO (SHIP_TO) SOLD_TO (Sold To) STMTS (Statements) STORE (Store) SUPPORT_SITE (Support Site) WORKS_AT (Works At) WORK_PERFORMED_AT (Work Performed At)		
AR	PARTY_TYPE		eBusiness Center, persons, organizations, accounts, leads, opportunities, quotes/orders, events, collateral	
AR	PAYMENT_TYPE		Events	

App.	Lookup Type	Values	Affects	Level
AR	PHONE_LINE_TYPE	FAX (Fax) GEN (General) IW (Inbound watts) OW (Outbound watts) VM (Voice mail) ASSISTANT (Assistant) HOME (Home0) MOBILE (Mobile) OFFICE (Office) PAGER (Pager)	Persons, organizations, opportunities	E
AR	PREFERENCES		eBusiness Center	
AR	REASON		Persons, organizations, leads, opportunities, events, Universal Work Queue	
AR	REFERENCE		eBusiness Center	
AR	REFERENCE		Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue	
AR	RELATIONSHIP_TYPE		Persons, organizations, lookup	
AR	REMIT		Persons, organizations	

App.	Lookup Type	Values	Affects	Level
AR	RESPONSIBILITY	APC (Accounts Payable Clerk) APS (Accounts Payable Supervisor) ARC (Accounts Receivable) ARS (Accounts Recievable Supervisor) CFO (Chief Financial Officer) COLCT (Collections) COLCTSUP (Collections Supervisor) CONTRLR (Controller) GLC (General Ledger Clerk) GLS (General Ledger Supervisor0 SOC (Sales Operation Clerk) SOS (Sales Operations Supervisor) TRSUR (Treasurer)	Persons, organizations, Universal Work Queue	E
AR	ROLE_LEVEL		Persons, organizations	
AR	SELECT_TYPE		Persons, organizations	
AR	SITE_USE_CODE		Persons, Organizations	
AR	STATE	AK AL	eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue	
AR	SUBJECT_TABLE		Persons, organizations	
AS	ACCESS_PRIVILEGE	F (Full unrestricted access) P (Prospecting Access) T. (Sales Team Access)	Access privilege for employee	S

App.	Lookup Type	Values	Affects	Level
AS	ASTATA_RUN_MODE	New (Run program in new mode) Restart (Run program after new mode aborted) Total (Run program in total mode to refresh all access records)	Run mode for Territory Assignment concurrent program	S
AS	AUTO_ASSIGNMENT_TYPE	Both None PRM TAP	Automatic assignment type	S
AS	BUDGET_AMOUNT		Leads, lookup	
AS	BUDGET_STATUS		Leads, lookup	
AS	CLOSE_REASON		Leads, opportunities	
AS	CLOSE_REASON	A (Availability) C (Competition) F (Function) P (Price) S (Service)	Opportunity close reason	E
AS	CONTACT_RANK_ON OPPORTUNITY	DECISION_MAKER END_USER	Opportunity contact rank	U
AS	DECISION_TIMEFRAME		Leads	
AS	FLAG	N (No) Y (Yes)	Flag	S
AS	INTEREST USE	COMPANY_CLASSIFICATION (Customer Classification) CONTACT_INTEREST (Contact Interest) LEAD_CLASSIFICATION (Lead or Opportunity Classification)	Interest use	S
AS	INTEREST_USE		Opportunities	
AS	ISSUE		eBusiness Center, leads, opportunities	

App.	Lookup Type	Values	Affects	Level
AS	LEAD_CONTACT_ROLE		Leads	
AS	LEAD_SOURCE		Leads, opportunities	
AS	MC_DATE_MAPPING_TYPE	E (End date of a period) S (Start date of a period)	Date mapping type	U
AS	METHODOLOGY_TYPE	OOP (Object Oriented)	Opportunity methodology type	E
AS	OPP_ACCESS_PRIVILEGE	F (Full Unrestricted Access) O (Full Access by Operating Unit) P (Prospecting Access) T (Sales Team Access)	Opportunity access privilege	S
AS	OPP_PROBABILITY_LINK	Error (New value is not acceptable) Warning (Warn user about error)	Opportunity probability links	S
AS	PLAN_ELEMENT_MAPPING	PCODE (Map quota to primary interest code) SCODE (Map quota to secondary interest code) TYPE (Map quota to interest type)	Sales categories mapping with sales quotas (Oracle Incentive Compensation)	S
AS	PRM_LEAD_TYPE		Opportunities	
AS	REJECT_REASON_CODE	ASSIGN_ERROR DUPLICATE VACATION	Leads	
AS	ROLE_TYPE		Persons, Organizations, accounts, lookup	
AS	ROLE_TYPE	AM (Account Manager) PS (Product Specialist)	Role type	U
AS	SALESFORCE_RELATIONSHIP		Opportunities	
AS	SCD_REFRESH_MODE	1 (Complete refresh) 2 (Incremental refresh)	Sales Credit Denorm refresh mode	U

App.	Lookup Type	Values	Affects	Level
AS	SCD_RUN_MODE	1 (Complete) 2 (Update)	Sales Credit Denorm run mode	E
AS	UPDATE_ACCESS		eBusiness Center	
AS	UPDATE_ACCESS	I (Inherit data) R (View data) U (Update subordinate's data)	Update access	S
AS	VEHICLE_RESPONSE_CODE		Leads	
AS	VEHICLE_RESPONSE_CODE		Opportunities	
AS	VEHICLE_RESPONSE_CODE		Lookup	
ASO	ASO_ITEM_TYPE		Accounts	
ASO	ASO_QUOTE_RELATED_OBJECTS		Quotes/Orders	
JTF	ACTION_TYPE	ADD ANSWER CREATE_FSR DEL INQ INTERACT RECONCILE SENT TRANSFER UPD UPDATE_FSR UPSELL WAIT XSELL	Events, Universal Work Queue	
JTF	ROLE_TYPE		Sales Team	

## B.2 System Profile Options

Each system profile option in this table is also described in the implementation step where it is set. This table compiles all system profile options and arranges them in alphabetical order by name.

The system profile options used by the Sales Family of Oracle eBusiness Suite applications have the following prefixes:

- OS: (Oracle Sales)
- OSO: (Oracle Field Sales)
- ASO: (Oracle Order Capture)
- JTF: (Oracle Foundation)
- ICX: (Oracle Foundation)
- ASL: (Oracle Field Sales/Laptop)
- JTM (Oracle Mobile Foundation)
- OTS: (Oracle TeleSales)

For more information, please refer to the *Oracle Field Sales Implementation Guide*.

### B.2.1 Setting System Profile Options

The procedure for setting up and changing system profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

In general, use this procedure to set or change profile options.

#### Steps

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

The Find System Profile Values window appears.

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

The profiles are displayed in the System Profile Values window.

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

## B.2.2 Table of System Profile Options

For a complete and updated list of profile options, please refer to the *Oracle Sales Online Implementation Guide* appendix on profile option.



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# Glossary

**call sheet**

Call sheets are lists, generated from contact lists, of people with which you want to have an interaction.

**CRM**

CRM is an acronym for Customer Relationship Management.

**customer**

Defined as an organization, person, or contact.

**DUNS number**

Dunn and Bradstreet number

**E-Business Suite**

Oracle Field Sales is part of the Oracle E-Business Suite, an integrated suite of applications for the enterprise, including both ERP and CRM.

**ERP**

ERP is an acronym for Enterprise Resource Planning.

**Flexfields**

Flexfields allow you to customize data fields to meet your specific organizational needs.

**forecast**

A predicted amount of sales for a specific time period.

**forecast threshold**

Before creating opportunity worksheets you can set up a forecast threshold to simplify your data input. A forecast threshold is a currency amount defined in your profile preferences that establishes a value, and any forecast equal to or below that value will be rolled up into a lump sum. This saves sales representatives and managers valuable time entering forecast data for opportunities below a certain value, the forecast threshold. This applies to opportunity worksheets only and this feature is optional.

Thresholds are not converted if you change your currency. If you change your currency for forecasting, you need to set the threshold amount accordingly.

**Income Planner**

Calculates compensation and performs "what if" scenarios to view actual compensation. Intended to motivate and incent the sales force by viewing possible compensation.

**organization**

A customer that is an organization.

**person**

A customer that is a person.

**profiles**

Profiles are used in this application to govern the way the application works.

**sales executive**

Manages sales managers and sales representatives.

**sales manager**

Manages one or more sales representatives.

**Sales Methodology**

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

**sales representative**

Does not manage any other sales representatives. However, a sales manager can also have a role as a sales manager with a different login.

**SIC**

Standard Industry Code

**Trading Community Architecture (TCA)**

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



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# Index

## A

---

Access  
    administration, 14-28  
Accounting calendar  
    administration, 14-3  
Administration  
    calendar type, 14-2  
    menu, 14-8  
Advanced Search, 3-4, 10-19

## B

---

Budget/Revenue entry  
    administration, 14-26

## C

---

Calendar  
    overview, 5-1  
    views, 5-2  
Call Center  
    administration, 14-18  
Call Sheets  
    overview, 10-102  
Compensation  
    overview, 12-1  
Contact List, 3-27  
    downloading, 10-99  
    saving, 10-99  
    subtab, 10-96  
Contacts  
    subtab, 10-86  
Custom Report

    adding to report listing, 14-31  
Customer  
    overview, 10-1  
    reports, 10-108

## E

---

External tools  
    administration, 14-11

## F

---

Forecast  
    forecast threshold, 9-14  
    generate, 9-22  
    linking to compensation, 9-9  
    opportunity worksheet, 9-10  
    overview, 9-2  
    product category worksheet, 9-19  
    reports, 9-24  
    submitting, 9-5  
Forecast category  
    administration, 14-24  
Forecast category mapping  
    administration, 14-25  
Fulfillment  
    sending collateral, 13-1

## G

---

GL Daily Rate  
    administration, 14-5

## H

---

### Home Page

- administration, 14-10
- editing a bin or chart, 4-8
- message, 14-13
- overview, 4-1
- setting up bins, charts, reports, 4-4

## I

---

### Interest codes

- administration, 14-15

### Interest status

- administration, 14-16

### Interest types

- administration, 14-14

## L

---

### Lead

- overview, 6-2

## O

---

### Opportunity

- adding a key competitor, 7-29
- closing, 7-34
- copying, 7-19
- creating, 7-6
- creating a quote from, 7-21
- overview, 7-2
- reports, 7-45
- searching, 7-18
- tracking win/loss, 7-32
- viewing line subtotals, 7-18

### Organization

- subtab, 10-4

## P

---

### Partner

- creating, 11-2
- creating a contact, 11-3
- overview, 11-1

### Password

- changing, 3-8

### Period Rate

- administration, 14-4

### Person

- subtab, 10-46

### Plan element mapping

- administration, 14-17

### Profiles

- compensation, 3-26
- customer, 3-24
- forecast, 3-21
- general, 3-13
- home page, 3-15
- lead, 3-17
- opportunity, 3-19
- setting, 3-12

## Q

---

### Quick Find, 3-2, 10-18

### Quotes

- creating, 8-3

## S

---

### Sales methodology

- administration, 14-22

### Sales stage

- administration, 14-20

### Status code

- administration, 14-21

## T

---

### Type Mapping

- administration, 14-4

## W

---

### Win probability

- administration, 14-19