

Oracle® Sales Offline

User Guide

Release 11*i*

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Oracle Sales Offline User Guide, Release 11i

Part No. B10632-02

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Contents

Send Us Your Comments	vii
Preface.....	ix
Intended Audience	ix
How To Use This Guide	ix
Documentation Accessibility	x
Other Information Sources	x
Do Not Use Database Tools to Modify Oracle Applications Data	xvi
About Oracle	xvi
1 Introduction to Oracle Sale Offline	
1.1 Overview	1-1
1.2 Sales Offline Prerequisites.....	1-3
1.3 Oracle Sale Offline Key Features.....	1-3
1.4 Oracle Sale Offline Integrations	1-5
1.5 Accessing Oracle Sale Offline	1-6
1.5.1 Territory Driven Download.....	1-8
1.5.2 Sales Team Driven Download.....	1-9
1.5.3 Forecast Driven Download.....	1-9
1.6 Navigating within Sales Offline	1-10
1.7 Setting Synchronization Preferences	1-10
1.8 Synchronizing Data.....	1-11
1.9 Conflict Resolution.....	1-13
1.9.1 Non-Validated Records (Rejected Records).....	1-14

1.10	Timing Log	1-16
1.11	Version Identification in Sales Offline.....	1-17
1.12	Status Bar Messages	1-17
1.13	Common Tabs	1-18
2	Managing Tasks	
2.1	Creating a Task	2-1
2.2	Updating a Task.....	2-3
2.3	Accessing the Daily Task Summary	2-4
3	Managing Leads	
3.1	Creating a Lead	3-2
3.2	Updating a Lead	3-3
3.3	Lead to Opportunity Business Flow	3-3
4	Managing Opportunities	
4.1	Creating an Opportunity	4-2
4.2	Updating an Opportunity	4-3
4.3	Opportunity to Quote Business Flow	4-4
5	Managing Quotes	
5.1	Creating a Quote.....	5-2
5.2	Updating a Quote	5-3
5.3	Quote Approvals	5-4
5.4	Place Order	5-4
6	Managing Forecasts	
6.1	Opportunity Worksheet	6-2
6.2	Product Category Worksheet.....	6-2
6.2.1	Viewing Product Level Forecasts Using Product Category Worksheets.....	6-3
6.3	Generating Forecasts.....	6-3
6.4	Viewing and Submitting Forecasts	6-4

7 Managing Customers

7.1	Organization Subtab	7-2
7.1.1	Creating a Customer - Organization	7-2
7.1.2	Updating a Customer - Organization	7-3
7.2	Contact Subtab	7-4
7.2.1	Creating a Customer - Contact	7-4
7.2.2	Updating a Customer - Contact	7-5
7.3	Person Subtab.....	7-6
7.3.1	Creating a Customer - Person	7-7
7.4	Updating a Customer - Person	7-7

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Part No. B10632-02

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Preface

Intended Audience

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

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

- The principles and customary practices of your business area.
- Oracle Sales Offline
- Oracle Field Sales (formerly known as Oracle Sales Online)
- 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.

How To Use This Guide

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

- Chapter 1 provides an introduction to Oracle Sales Offline.
- Chapter 2 provides information on creating and updating a task.
- Chapter 3 provides information on creating and updating leads.
- Chapter 4 provides information on creating and updating opportunities.
- Chapter 5 provides information on creating and updating quotes.

- Chapter 6 provides information on creating and updating forecasts.
- Chapter 7 provides information on creating and updating customers.

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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 Offline.

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 Offline 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 Offline.

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 Offline (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Documents Related to This Product

Oracle Sales Offline Implementation Guide

This guide provides how to implement and manage Oracle Sales Offline.

Oracle Field Sales User's Guide

This guide explains Oracle Field Sales, an HTML-based applications that provides sales managers, sales representatives, and sales executives with assistance in managing their business opportunities, customer, forecasting, incentive compensation, partners, and quotes.

Oracle Quoting User Guide

This guide explains how to use Oracle Quoting to create and manage customer quotes across all sales and interaction channels. Oracle Quoting is used to propose product solutions and perform negotiations, while enforcing consistent business

rules throughout the sales cycle. Users can publish and print quotes, and eventually convert quotes to orders.

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.

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 Offline. This manual details additional steps and setup considerations for implementing Oracle Sales Offline with this feature.

Multiple Organizations in Oracle Applications

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sales Offline 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.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Sales Offline 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 Offline working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle⁸ⁱ server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches,

download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

Oracle 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.

Introduction to Oracle Sale Offline

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

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Sales Offline Prerequisites"](#)
- [Section 1.3, "Oracle Sale Offline Key Features"](#)
- [Section 1.4, "Oracle Sale Offline Integrations"](#)
- [Section 1.5, "Accessing Oracle Sale Offline"](#)
- [Section 1.6, "Navigating within Sales Offline"](#)
- [Section 1.7, "Setting Synchronization Preferences"](#)
- [Section 1.8, "Synchronizing Data"](#)
- [Section 1.9, "Conflict Resolution"](#)
- [Section 1.10, "Timing Log"](#)
- [Section 1.11, "Version Identification in Sales Offline"](#)
- [Section 1.12, "Status Bar Messages"](#)
- [Section 1.13, "Common Tabs"](#)

1.1 Overview

Oracle Sales Offline give you the information you need to manage your sales efforts while you are on the road. You can access detailed customer information, product interests, and notes about customers. Contact information allows sales

representatives to identify key players within their accounts and share that information with other members of the sales team.

Sales Offline is a mobile application that imports and exports (synchronizes) information from an Oracle enterprise database, and enables you to view and/or update your sales information remotely via your laptop computer. You can add, view and edit customers, opportunities, leads, quotes, and forecasts right from your laptop, saving the changes for upload later.

Your sales organization can optimize their selling time in the field by having key customer information readily available. This enhances your relationships with customers and promotes company profitability. Oracle Sales Offline integrates with the Oracle Sales applications, and is designed to maximize sales effectiveness in the mobile environment. Oracle Sales Offline is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

Simple, Effective Design for Sales and Support Organizations

Oracle Sales Offline offers sales organizations the functionality required in an interface that is both familiar and effective. Leveraging the capabilities of desktop applications, Oracle has designed a template that provides sales organizations a way to manage sales information without the need to install additional software. The template is easily downloaded from Oracle Field Sales and provides upload/download data capabilities. Oracle Sales Offline provides you with the ability to view and edit sales information, while your support organization does not have to support any additional technical software on the laptops.

True Team Selling

To manage and close deals successfully, sales teams often cross group boundaries, territories and even company lines. Oracle Sales Offline works with Oracle Field Sales and Oracle Telesales to create a virtual sales team that enables the sharing of opportunities, contacts, notes, and other pertinent customer information between sales team members. Opportunities can be automatically or manually assigned to sales members. Sales representatives are able to see valuable information from partners about their accounts as they prepare for on site meetings. Oracle's sales automation modules complement each other and provide the perfect solution for team selling in a dynamic selling environment.

Access to Sales Information

Oracle Sales Offline gives you the information you need to manage your sales efforts when you are on the road. You can access detailed customer information, product interests, and notes about the customers. Contact information lets

representatives identify key players within their accounts and share that information with other members of the sales team.

1.2 Sales Offline Prerequisites

These are the prerequisites for Oracle Sales Offline:

Oracle Applications

- Oracle Field Sales, minimum version required is 11.5.7 (also known as Oracle Sales Online)
- Oracle Quoting, minimum version required is 11.5.7 (if you will be using offline quoting)
- Oracle Web Applications Desktop Integrator

Desktop Requirements

- Windows 95/NT/2000 operating system
- Microsoft Excel 2000
- Licensed copy of WinZip

Desktop Recommendations

- 500 mHz or higher processor
- 256 mb RAM or higher

1.3 Oracle Sale Offline Key Features

Oracle Sale Offline includes the following features:

- [Lead Management](#)
- [Opportunity Management](#)
- [Sales Forecasting](#)
- [Offline Quoting](#)
- [Task Management](#)
- [Flexfield Support](#)
- [Home Tab - New Items and Conflict Resolution](#)

- [Incremental Synchronization](#)
- [Sync Preferences Filters](#)

Lead Management

You can manage leads and qualify them into sales opportunities. Leads can be prioritized so that you can target activities on hot leads first. Oracle Sales Offline gives you access to lead information such as notes history, key contact, and product interests. All changes to the lead can be synchronized back to the enterprise database. Also, you can perform the lead to opportunity business flow in Sales Offline.

Opportunity Management

You can manage opportunities remotely through the sales cycle. Oracle Sales Offline gives you access to opportunity activities and statuses, notes history, key contacts and sales credits. You can create and update the opportunity information by adding new notes, changing the opportunity status, and adding product interests. Access to this information and the ability to update it enables sales organizations to sell more effectively. Sales team members can share information about call activity, major issues, and account strategy. All changes to the opportunity can be synchronized back to the enterprise database. Also, you can perform the opportunity to quote business flow in Sales Offline.

Sales Forecasting

Oracle Sales Offline enables you to build forecasts constructed from opportunities. Sales forecasts can be updated on the road, and forecast commitments can be synchronized back to the enterprise database to be viewed by sales managers.

Offline Quoting

Oracle Sales Offline supports mobile quoting functionality. The quoting module allows you to maintain and develop customer quotes. You can view detailed quote information, such as customer account information, contact details, and ship-to and bill-to information. Products can be added, removed, and priced using offline quoting. Manual price adjustments can be placed at the product line level. All changes to the quote can be synchronized back to the enterprise database. You can generate quotes to view and edit at a customer site.

Task Management

Sales Offline supports task management features. You can download tasks that are assigned to you, or that you own. These tasks can be viewed and edited in Sales

Offline, and you also have the ability to create new tasks. Tasks can be stand-alone, or associated to an Oracle business object. You have the ability to display tasks for a particular day or date range in Sales Offline using the Daily Task summary form.

Flexfield Support

Sales Offline supports customer defined flexfields, where applicable. Flexfields established in the online sales applications can be downloaded for use in Sales Offline. You can add, view, and edit data captured in these flexfields, and have the data synchronized to and from the Online sales applications.

Home Tab - New Items and Conflict Resolution

The Home Tab of Oracle Sales Offline is the first window you see in the application, and lists newly added or changed records during the last synchronization. Initially, the Home tab will not list any records. New or changed items are listed as the result of subsequent synchronizations. Records are listed in the various tables, depending on the source of the record.

The Conflict Resolution subtab is available in the Home Tab. The conflict resolution sheet displays conflicted records that occurred during synchronization, and provides a side-by-side comparison of the local client record and the associated server record. You can reapply or discard the conflict records directly through Sales Offline.

Incremental Synchronization

Sales Offline supports incremental synchronization for uploading and downloading sales data. After the initial install, only the records that have been changed or added in Sales Offline are uploaded during synchronization, and only the records that have been added or changed in the online applications are downloaded.

Sync Preferences Filters

The Synchronization Preferences allows you to selectively download sales data. The synchronization preferences user form allows you to filter data based upon Oracle business objects, such as, organizations, leads and opportunities. These selective download options can be saved and edited.

1.4 Oracle Sale Offline Integrations

Oracle Sale Offline integrates with the following modules:

- [Oracle Field Sales](#)

- [Oracle Quoting](#)

Oracle Field Sales

Oracle Field Sales is an application designed for field sales representatives, sales managers, and executives. This application provides a complete set of tools that enables sales teams to manage the sales cycle from beginning to end.

Oracle Quoting

Oracle Quoting is used to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle. Users can publish and print quotes, and eventually convert quotes to orders. This integration applies only if offline quoting is used in Sales Offline.

1.5 Accessing Oracle Sale Offline

Sales Offline is available from the Mobile tab in Field Sales, in the form of a compressed file.

Reference

Oracle Sales Offline Implementation Guide

Login

Log in to Oracle Applications to access Field Sales.

Responsibility

Sales Online Administrator

Navigation

Mobile > Download Sales Offline Template

Steps

If you are a first-time-user, you must download Sales Offline from Oracle Field Sales before proceeding.

To download Sales Offline:

1. Login to Oracle Field Sales.
2. Click the Mobile tab.

3. Create a new folder in your directory.
4. Download Sales Offline by clicking the Download Sales Offline Template link.
5. Navigate to the downloaded file SalesOffline.zip in your directory.
6. Unzip the file into your folder.
7. Run Sales Offline by double-clicking the file SalesOffline.xls.
8. Enable macros when prompted. If Sales Offline fails to open when you choose to enable the macros, check to ensure that the macros security is set to the medium or low level. You can do this by navigating to Tools > Macro > Security in Excel 2000.
9. Click the Sync icon.
10. Enter the requested user information and then click **Sync**. The synchronization preferences will display the first time you Sync.
11. Enter the download criteria by choosing the [Territory Driven Download](#), [Sales Team Driven Download](#), or [Forecast Driven Download](#).

You can filter your data using the Sync preference filters associated with the downloads. See [Setting Synchronization Preferences](#) for details. These preferences can be saved for use in future synchronizations.

Note: Not all synchronization preferences filters are applicable to the Territory Driven Download.

These are the Sync preference filters which are applicable to Territory Driven and Sales Team Driven downloads:

- **Lead Preferences** - can be filtered by Status, Channel, Lead Rank, Budget Status, Time Frame, or Number of Records
- **Opportunity Preferences** - can be filtered by Status, Sales Stage, Sales Channel, or Win Probability (from/to)
- **Quote Preferences** - can be filtered by Inventory Category Set (Default Category Set, or the Sales and Marketing Category Set), Inventory Category, or Price List

You must select items (from the Default Category Set, the Sales and Marketing Category Set, or the Price List) for download. You can select items from multiple categories. Multiple items can be selected by highlighting a row and using the Ctrl or Shift functions.

- **Forecast Preferences** - can be filtered by Period Type, Category, Start Period and End Period, or Credit Type
- **Customer Preferences** - can be filtered by Customer Category, or Country

1.5.1 Territory Driven Download

The Territory Driven download provides added efficiencies on top of the Sales Team Driven download by allowing the user to limit the address and contact data which is downloaded to that which is in their sales territory. This is of benefit in that the user is able to download a smaller quantity of data, which is more relevant to their day to day sales activities. Sales territories are typically established using Territory Manager, and manual Territory Location assignment can also be performed in Sales Offline.

The Territory Driven Download accounts for only the address-specific qualifiers, such as postal code. It does not take into account territory qualifiers, such as named accounts. If you use the Oracle Territory Manager assignment process, the territory address qualifiers must be established before this synchronization option can be used effectively. You can also manually assign a sales user to a certain Oracle business object. Manual assignments will also be synchronized by Sales Offline using the Territory Driven Download.

Only addresses associated to the sales user's territory are available under an Organization or Person. Users may not be able to download or view all addresses associated to an Organization or Person.

This is how the Territory Driven downloads affect Oracle business objects available in Sales Offline:

Organization and Persons: The Territory Driven Download will download only Customers, which have an address that resides within a sales representatives established sales territory via an established address qualifier. The Territory Driven Download will download only Contacts related to an Organization, which have an address that resides within a sales representatives established sales territory.

Opportunity: If a Sales Offline user is on the sales team (automatically assigned via territory or manually assigned) for an Opportunity, the Opportunity is synchronized to Sales Offline.

Note: Only Opportunity contacts which reside in the mobile sales users territory are downloaded with the Opportunity. Contacts, associated to the Opportunity, that do not have addresses associated with the mobile sales users territory will not get downloaded or viewed in Sales Offline.

Lead: If a mobile sales user is on the sales team (automatically assigned via territory or manually assigned) for a Lead, the Lead is synchronized to Sales Offline.

Note: Only Lead contacts which reside in the mobile sales users established territory are downloaded with the Lead. Contacts, associated to the Lead, that do not have addresses associated with the mobile sales users territory will not get downloaded or viewed in Sales Offline.

The Territory Driven Download does not affect the Task or Quote synchronization method. If a user is on the sales team of a Quote (regardless of Territory information), the Quote is synchronized to Sale Offline. If a user owns or is assigned a Task, the Task is synchronized to Sales Offline.

1.5.2 Sales Team Driven Download

The Sales Team Driven download will result in records based on your sales team access. If you are on the sales team of an Oracle business object (for example, organization, lead, or opportunity) these records are downloaded to Sales Offline.

1.5.3 Forecast Driven Download

The Forecast Driven download of data is based on the opportunities that are open within the forecast range selected. Customer organizations and contacts that are associated with the opportunities are downloaded.

1.6 Navigating within Sales Offline

In Sales Offline, tabs indicate the first layer of information and subtabs show further details. Links enable you to access detailed information about specific items.

The following table describes navigation features and fields:

Table 1–1 *Navigation in Sales Offline*

Navigation Feature	Description
Tab	Enable you to navigate among the areas of functionality in the application.
Subtab	Enable you to access further functionality under a tab.
Link or hyperlink	Enable you to navigate to further levels of detail under the subtab.
Asterisks	Designate required fields. These fields have a white background. Fields with a white background and no asterisk are optional. Fields with a grey background are read-only.
Column headings	Enable you to sort rows of information. Clicking on a column heading will sort rows in ascending or descending order based on the information in the selected column.
Go button	Enables searches for a list of values.
Ctrl F	Enables you to search for a specific value.

1.7 Setting Synchronization Preferences

Sales Offline enables you to select preferences for synchronization. These preferences apply to the data downloaded from Field Sales. During the first time synchronization, Sales Offline will by default do a full download of necessary data. Using preferences to select subsets of data to download can save download time and contribute to improved application performance. You can modify these preferences after making your initial choices.

Steps

1. In Sales Offline, click the Profile icon.
2. Make your synchronization selection.

3. Click **Save** to save changes or **Sync** to start the synchronization process (which will save changes on completion).

1.8 Synchronizing Data

The Sales Offline synchronization process uploads changes or additions to the server and downloads changed or added records back to Sales Offline on your laptop. You do not have to login to Oracle Field Sales to upload and download data. The synchronization function handles this process within the application. See [Setting Synchronization Preferences](#) for details on changing data synchronization preferences for your data downloads.

Steps

To synchronize data:

1. In Sales Offline, click the Sync icon.
2. The Sync Login window appears. Enter your user name and password.
3. Click **OK**. The Sync Console appears. A status bar shows the progress of the synchronization. While the synchronization is in progress, you can:
 - **Go Offline** - Click to go offline while synchronization is in progress. This enables you to use Sales Offline in a read-only (locked) mode while synchronization halts in the background. No changes that you make while Sales Offline is in locked mode are saved. Data synchronization must complete before you can create, modify, or save data in Sales Offline.

Note: Go Offline is not available during some parts of the synchronization. For example, you cannot choose Go Offline when the synchronization engine is downloading data.

If you click the Sync button, or attempt to save data while the synchronization is offline in locked mode, you will see this message:

Sync and Save disabled while in locked mode.

This means that the Sync button and the save functionality are disabled while Sales Offline is in locked mode.

Note: The buttons on the tabs (for example, Task or Lead) are not disabled (greyed out) while Sales Offline is in locked mode. However the functionality associated with these buttons is disabled, so you cannot Create, Save, Cancel, or Apply data while Sales Offline is in locked mode.

To view the progress of the synchronization while in locked mode, close the worksheet, and then reopen it. When you reopen it, you will see this message:

Do you want to complete the unfinished sync?

and have these choices:

- **Yes** - continues the synchronization. You will have to provide a login password. The Sync Console will appear and display the synchronization status bar.
 - **No** - enables you to remain in the offline (locked) mode
 - **Cancel Sync** - Click to cancel the synchronization that is in progress. This button is functional at the beginning of the synchronization. As the synchronization progresses, you eventually will not be able to cancel, and this button is disabled. The Cancel button is disabled when the synchronization process is writing to the enterprise database, to protect the integrity of the database.
 - **Show or Hide Details** - Click **Show** to expand the Sync Console and show synchronization processing messages. These messages are similar to a log file. Click **Hide** to hide the processing messages.
4. You will receive a message at the end of the synchronization process informing you that the synchronization was successful or if there were conflict errors.
- a. If you receive conflict errors, navigate to the Home tab and click the Conflict Resolution subtab to resolve the conflicts in the Conflict Resolution screens (see the Conflict Resolution section of the *Sales Offline User Guide*).
 - b. If you receive a server not found and not available error, please contact your administrator for assistance.

5. At the successful end of the synchronization, you will see a message that the synchronization is complete, and another message recommending that you save your data. Click **Yes** to save or click **No** to cancel the save.

Note: It is strongly recommended that you save your data after the synchronization completes.

1.9 Conflict Resolution

Using a remote application that synchronizes information with a master database can result in data conflicts. Conflict resolution is critical to using a remote application successfully, and it is important that up-to-date and accurate information is written to the master database.

It is important to note that the server record will always override your Sales Offline client record. If the same server and client record has been changed in between synchronization processes, a conflict will occur, and the server record will override your client record. The conflict can be resolved in the Home tab, using the Conflict Resolution subtab.

Steps

To resolve conflicts between the Oracle Field Sales database and Sales Offline:

1. Open Sales Offline.
2. Click the Conflict Resolution subtab in the Home tab.
3. In the Conflict Resolution screen, you will see tables of conflicts that occurred during synchronization.
4. Click the link to see details of the conflicted record and make the necessary updates before deciding to apply the changes or discard them.

On the left side of the form is your local Sales Offline record. On the right side of the form is the Oracle Field Sales server record. The fields that caused the conflict are shown in red.

If you choose Reapply, the Sales Offline record will override the Oracle Field Sales record. You must perform a synchronization for your record to be applied to the database. If you choose Discard, your Sales Offline changes will not be applied to the Oracle Field Sales server. If you discard the conflicts you do not need to perform a synchronization.

5. From the main Conflict Resolution screen you can select groups of conflicted records to Reapply or Discard. Select the checkbox by the record(s) you want to reapply or discard. If you want to reapply your changes to the server, click **Reapply**. If you want to discard the conflict, click **Discard**.

1.9.1 Non-Validated Records (Rejected Records)

You can view rejected records in Sales Offline, as well as a message indicating why the record was rejected. Any record that is created in Sales Offline and does not pass the online validation rules during the upload-synchronization process is captured in a Non-Validated record table in the Home tab of Sales Offline. The non-validated records table displays each record that did not pass the server side validation rules, the reason why the record did not get applied to the server, and allows you to rectify (Reapply, Discard or Cancel) the non-validated record.

The table contains two columns, Non-Validated Records and Sync Time. The Non-Validated Records column contains the record name with hyperlink. The Sync Time column contains the server date stamp for the non-validated record's synchronization.

The message only appears if non-validated records are listed. The most recent non-validated records are listed at the beginning of the table. If a non-validated record is a header record, then any accompanying line records are grouped together in the table, with the header record listed above the line records.

If the rejected records are related (for example, an opportunity header item and the related opportunity lines), then these records are grouped together in the non-validated table. If a header record results in a conflict, it is the first item in the grouped records, followed by the related line items.

Both rejected header and lines records are listed. Click the identifying text for the rejected record and activate the hyperlink that will generate the conflict resolution details form. You can read the resulting error message, determine the details of the conflict record, and then choose what action to take (either Reapply or Discard) for the non-validated conflict record.

If you choose to Reapply a header record

This message will appear:

Are you sure you wish to reapply this record? If you choose to reapply this non-validated record, you must perform a synchronization operation for the record to be applied to the online server applications. This record, and all it's

associated line items, if applicable, will be applied to the online server applications.

Click **OK** or **CANCEL**. If you choose Cancel, there is no further action.

If you clicked OK, the header record is removed from the non-validated table, a row is inserted into the appropriate summary sheet (depending on the source of the record), and the record is queued for synchronization.

If the header record has related line records, the associated records will also be removed from the non-validated table.

If you choose to Reapply a line record

This message will appear:

In order to reapply this record you must also reapply the header record. Please select, and reapply the header record from the Non-Validated records table.

Click **OK**.

The line record will remain in the non-validated table and will only be removed when the header record is reapplied or discarded.

If you user choose to Discard a header record

This message will appear:

Are you sure you wish to discard this record? If you choose to discard this non-validated record, this record and all its associated line items, if applicable, will be removed from Sales Offline. This record will NOT be synchronized to the online server applications, and will be removed from Sales Offline.

Click **OK** or **CANCEL**.

If you clicked OK, the header record is removed from the non-validated table, no row is inserted into any summary sheet, and the record is removed from Sales Offline.

If the header record contains related records, then the line records will also be removed from the non-validated table, and the related data is removed form Sales Offline as well.

If you choose to Discard a line record

This message will appear:

In order to discard this line level record you must first discard the header record. Please select, and discard the header record from the Non-Validated Records table. If you choose to do so, both the header record and all its associated line records is removed from Sales Offline.

Click **OK**.

1.10 Timing Log

Timing functionality has been added to Sales Offline to provide timing statistics for these events:

- Opening a file
- Synchronizing data
- Saving a file

These statistics enable administrators to analyze Sales Offline's performance and identify issues that may arise when a large volume of records are processed.

Enabling Detailed Logging

Steps

By default, the timing log is always enabled. You can choose to enable detailed logging.

1. Open SalesOffline.xls.
2. Select Oracle > Logging > Detailed
3. You can also choose Reset to restart the logging, so that the existing log file is deleted and a new one begun during your current session.
4. Exit the template.
5. Reopen the template.

The next time you synchronize your data, Sales Offline will write detailed logging information about your synchronization (either full or incremental) or

opening or saving a file to the log file. The log file is located in the logs directory in the folder containing Sales Offline.

Note: Each time you open the Sales Offline template, the log file is copied to a .bak file, and the .log file is cleared. To view the timing log, you must look at the log in the logs directory before you open the template.

Logging for a Full or Incremental Synchronization

Steps

The first synchronization of the Sales Offline data is a full synchronization. Subsequent synchronizations are incremental.

1. Open SalesOffline.xls.
2. Perform a full synchronization by selecting the Sync button and providing login information.
3. Exit the template.
4. View the resulting log file in the logs directory in your Sales Offline folder.

1.11 Version Identification in Sales Offline

You can provide support personnel with a unique version number that identifies the implemented client version of Sales Offline by navigating to Oracle > About Sales Offline. This enables you to identify the version of the client in use when you report a Sales Offline problem.

1.12 Status Bar Messages

Status bar messages display during file open, synchronization, file save, and file close, so that the you knows what is occurring on your computer. Status bar messaging for phases that relate to the processes of file open, file close, file save and synchronization within the Sales Offline client, are displayed to on the Excel status bar.

Status bar messages are reported to the user as each processing phase occurs. For example, if the phase is 'save contacts', the message 'Saving Contacts' is displayed.

1.13 Common Tabs

Some tabs are common to several areas in Sales Offline. Rather than describe them redundantly in each instance, they are described here.

Adding Purchase Items

Steps

1. In the window (for example, Create Lead, or Create Opportunity), click the Purchase Items tab.
2. Click **Add**.
3. Select a product category.
4. Enter a quantity.
5. Enter an amount.
6. Enter a source name.
7. Click **Add** to add additional items.

You can remove purchase items by clicking the checkbox for an item and clicking Remove.

Adding Tasks

Steps

1. In the task window (for example, Create Lead, or Create Opportunity), click the Tasks tab.
2. Click Create. The Create Tasks window appears. This window is detailed in [Chapter 2, "Managing Tasks"](#). The tasks that you create are listed in the Tasks tab.

Adding Notes

Steps

1. In the task window (for example, Create Task, or Create Lead), click the Notes tab.
2. Select a note type.

3. Select a note status.
4. Enter the note text.
5. Click **Add Note**. Notes that you add are posted in the upper part of the window. You can sort them by date or by type.

Managing Tasks

Sections in this chapter include:

- [Section 2.1, "Creating a Task"](#)
- [Section 2.2, "Updating a Task"](#)
- [Section 2.3, "Accessing the Daily Task Summary"](#)

Use the Task tab to view, create and edit tasks. Tasks are your day-to-day activities related to customers, leads, and other sales-cycle events. Also, the Calendar button enables you to access a Daily Task summary, which lists your tasks occurring between specified start and end dates.

The Task tab displays all of your tasks, or tasks that have been assigned to you.

Note: Sales Offline does not support recurring tasks in this release.

2.1 Creating a Task

Steps

1. In the Task tab, click **Create**.
2. In the Task Details tab, select a task type.
3. Enter a task name.
4. Describe the task.
5. Set the Priority for the task.
6. Select a Status for the task.

7. Specify if the task should be private or requires notification.
8. Select a Category for the task.
9. Select start and end dates and times for the task, and specify if it is Planned, Scheduled, or Actual.
10. Select the customer type, if needed, and search for the customer's name.

Note: The task number is generated after synchronization.

11. Click the References tab to add optional reference information to the task.

You may also remove any reference rows by selecting the associated remove checkbox and clicking **Save** or **Apply**.

Note: The References tab in Sales Offline will not automatically populate reference rows. Upon syncing the newly created task, the reference rows will automatically be created in the online sales application, and the appropriate reference rows are synchronized to the Sales Offline task. You may add additional rows in Sales Offline if you choose to do so.

For example, if you select a contact, Brenda Johnson@ Business World, the references for the contact Brenda Johnson and organization Business World are automatically generated by the online applications after you synchronize.

12. Click the Assignments tab to add optional assignees to a task.

You can add additional persons to assign the task. In the Assignments tab of the Task detail user from, click the Add an Assignment field and select the person to assign the task from the pull-down menu. Click **Add**.

You may also remove an assignment rows (except the "owner" row) by selecting the associated remove checkbox and clicking **Save** or **Apply**.

Note: The Assignments tab in Sales Offline will not automatically populate any assignment rows. With the next synchronization, the, the assignment's "owner" row for the new task is automatically created in the online sales application, and the "owner" row is synchronized to the Sales Offline task record. The "owner" of the task is the Sales Offline user who created the task. You may add additional assignee rows in Sales Offline if you choose to do so.

13. Click the Contacts tab to add optional contacts to a task. In the Contacts tab of the Create Task user window, place in the contacts name you wish to add, click **Go**, and select the contact from the list of values. In order to select the primary contact for a Task, select the primary radio button next to the contact you wish to mark as primary.

You may remove any contact rows by selecting the associated remove checkbox and clicking **Save** or **Apply**.

Note: The contacts (party relationships) available in the Contacts tab depend on the information in the Customer Frame of the Task details tab. Only contacts associated (for example, which have relationships to the Organization) with the Organization in the Customer Frame is available in the Contacts tab.

14. Click the Notes tab to create a note for the task.
15. Click **Create** to create the task.

2.2 Updating a Task

Steps

To update an existing task:

1. In the Task tab, click the task name. The Task Details window opens.
2. Complete any appropriate updates.

3. Click **Apply** to apply changes as you continue to make changes, or click **Save** when you have completed your changes.

2.3 Accessing the Daily Task Summary

Click **Calendar** to access a Daily Task Summary. This summary displays all of the tasks that have a start date of a specified day, or within a date range. The task summary displays this task information:

- Task name
- Status
- Start date and end date

Managing Leads

Sections in this chapter include:

- [Section 3.1, "Creating a Lead"](#)
- [Section 3.2, "Updating a Lead"](#)
- [Section 3.3, "Lead to Opportunity Business Flow"](#)

Use the Lead tab to view and manage leads. Leads are intended to capture the initial contact with potential customers, gathering information to indicate to a sales organization whether or not there is sufficient interest on the part of the buyer. When a lead is entered into the system, it can be ranked and assigned to the appropriate sales resource.

Once enough key information has been gathered, a lead can be qualified by a sales representative.

Leads can be generated through different sources:

- Marketing campaigns and trade shows can generate leads that can be imported into the system through the Lead Import process.
- TeleSales agents record lead information from phone calls into the system.
- Field Sales representatives record lead information from the field into a sales application.

You can perform the following functions from the lead tab:

- Create leads
- Update leads, which includes maintaining:
 - Contacts
 - Sales Teams

- Purchase Items
- Notes
- Tasks

Note: There is Flexfield support for Header and Purchase Item level flexfields. If Flexfield functionality has been implemented for a lead, the Flexfield name, field, and Flexfield are displayed.

3.1 Creating a Lead

Steps

To create a lead:

1. In the Lead tab, click **Create**.

The Create Lead window opens. Certain fields will automatically populate based on data and profile preferences established in your Online Sales applications.

2. Select the Organization or Person radio button to list the organization name or the person's name and address in the search results.

Enter a customer name or search for a customer. Place the appropriate customer name in the customer field, or enter part of a customer name and click Go. The list of customers will display. You can select a customer from this list, or search for another customer.

Or, you can create a customer by clicking Create Customer.

An address is returned with the selected customer.

Select an address by clicking **Add or Change** next to the address field. A list of customer addresses displays in the Select an Address window. Click the radio button next to the appropriate address and click **Select**.

3. Enter a lead name.
4. Select a Primary Contact for the lead, or create a new contact by clicking New.
5. Select the Contact Role.
6. Specify whether the lead is Qualified and/or Urgent.
7. Add the Project name associated with this lead.

8. Select the Status of the lead.
9. Select the Lead Rank.
10. Select a Channel for the lead.
11. Select a Response Channel.
12. Select the Time Frame for the lead.
13. Select a Budget Status.
14. Enter the Budget amount.
15. Select Currency type.
16. Enter the Source Name for the lead, or search for the name by clicking Go.
17. Enter the Offer name, or search for the name by clicking Go.
18. Enter any flexfield information, if applicable.
19. Click the Purchase Items tab to enter purchase item information.
20. Click the Notes tab to enter notes.
21. Click **Save** to save the lead.

If needed, click **Cancel** to cancel creation of the lead.

3.2 Updating a Lead

Steps

To update an existing lead:

1. In the Lead tab, click the name of the lead. The Lead Details window opens.
2. Complete any appropriate updates.
3. Click the Opportunities tab to view any opportunities generated by the lead.
4. Click **Save** when you have completed your changes.

If needed, click **Cancel** to cancel update of the lead.

3.3 Lead to Opportunity Business Flow

To create a opportunity from an lead:

In the Lead Details window, click **Lead to Opportunity**.

Certain information will flow from the lead to the new opportunity, in a new Opportunity Detail window. The lead information that will flow to the new opportunity is:

- Lead Name (Opportunity name)
- Customer Name
- Primary Contact
- Project
- Budget
- Currency
- Source (header level)
- Offer (header level)
- Address
- Lead Purchase Items (including quantity, amount, source, and offer)
- Sales Team
- Contacts

Managing Opportunities

Sections in this chapter include:

- [Section 4.1, "Creating an Opportunity"](#)
- [Section 4.2, "Updating an Opportunity"](#)
- [Section 4.3, "Opportunity to Quote Business Flow"](#)

An opportunity is a potential sale. This process begins with the initial customer contact and ends when the sales representative makes or loses the sale.

You can perform the following functions from the opportunity tab:

- Create opportunities
- Update opportunities, which includes maintaining:
 - Purchase Items
 - Contacts
 - Classifications
 - Win/Loss
 - Leads
 - Sales Team
 - Notes
 - Tasks

Once opportunities are identified, you can perform the following tasks:

- Enter information on items to be purchased
- Track the likelihood of closing the sale

- Allocate credit toward sales quotas after closing a sale
- Create a quote from the opportunity
- Add other issues (under the Win/Loss tab)

Sales representatives can manage existing opportunities, assigned to them manually or automatically through Territory Assignment, or they can enter new opportunities.

By default, the sales representative who created the opportunity has full access to the opportunity. Full access to the opportunity means that the sales representative who created the opportunity can add other sales team members, assign sales credits, and rate the likelihood that the opportunity will succeed.

Note: There is Flexfield support for Header and Purchase Item levels. If Flexfield functionality has been implemented for an opportunity, the Flexfield name, field, and Flexfield button display.

4.1 Creating an Opportunity

Complete the following steps to create an opportunity:

Steps

1. In the Opportunity tab, click **Create**.

The Create Opportunity window opens.

2. Select the Organization or Person radio button to list the organization name or the person's name and address in the search results.

Enter a customer name or search for a customer. Enter the appropriate customer name in the Select a Customer field, or enter part of a customer name and click Go. The list of customers will display. You can select a customer from this list, or search for another customer.

Or, you can create a customer by clicking Create Customer.

Select an address by clicking **Add or Change** next to the address field. A list of customer addresses displays in the Select an Address window. Click the radio button next to the appropriate address and click **Select**.

3. Enter an Opportunity Name.
4. Select a Primary Contact for the opportunity, or create a new contact by clicking New.

5. Select the Contact Role.
6. Enter the Project Name.
7. Select the Status of the opportunity.
8. Select the Sales Channel.
9. Select the Methodology associated with the opportunity.
10. Select the Sales Stage for the opportunity.
11. Select the Win Probability.
12. Enter the Budget amount.
13. Enter the close date for the opportunity.
14. Specify the currency type.
15. Enter the Source Name for the opportunity, or search for the name by clicking Go.
16. Enter the Offer name, or search for the name by clicking Go.
17. Click the Purchase Items tab to enter purchase item information.
18. Click the Notes tab to enter notes.
19. Click **Apply** to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.
20. Click **Save** to save the opportunity.
If needed, click **Cancel** to cancel creation of the opportunity.

4.2 Updating an Opportunity

Steps

To update an existing opportunity:

1. In the Opportunity tab, click the name of the opportunity. The Opportunity Details window opens.
2. Complete any appropriate changes.
3. Click **Apply** to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.
4. Click **Save** when you have completed your changes.

If needed, click **Cancel** to cancel the update of an opportunity.

4.3 Opportunity to Quote Business Flow

To create a quote from an opportunity:

1. In the Opportunity Details window, click **Create Quote** to flow the opportunity information into a new quote. A new quote can be created based on certain information that flows from an existing opportunity. Only purchase item rows with a specified inventory item numbers (along with it's associated quantity) are carried over to the new quote.

Certain information will flow from the opportunity to the new quote, into a new Create Quote window. The opportunity information that will go into the new quote (provided the information exists in the opportunity) is:

- Opportunity Name (flows to the Quote Name field)
 - Customer Name
 - Contact Name
 - Sales Channel
 - Opportunity Purchase Items (if they have specific inventory items on the purchase item line)
 - Sales Team
 - Address
2. Click **Apply**.

Managing Quotes

Sections in this chapter include:

- [Section 5.1, "Creating a Quote"](#)
- [Section 5.2, "Updating a Quote"](#)
- [Section 5.3, "Quote Approvals"](#)
- [Section 5.4, "Place Order"](#)

A quote is the communication of pricing and discounts for a particular sale. When the customer is ready to order a particular product they are notified of this available pricing and discount information through a quote.

Note: You must select specific items from the Profile: Sync Preferences: Quote tab to be used in the quoting module Only those items downloaded to Sales Offline can be used to add new products to the quote.

You can perform the following functions from the quote tab:

- Create quotes
- Update quotes, which includes maintaining:
 - Lines
 - Addresses
 - Sales Teams
 - Sales Credits
 - Approvals

- Notes
- Tasks

Note: There is Flexfield support for the Quote Header and Line levels. If Flexfield functionality has been implemented for a quote, the Flexfield name, field, and Flexfield button will display.

5.1 Creating a Quote

Steps

To create a quote:

1. In the Quote tab, click **Create**.

The Create Quote window opens.

2. Enter a Quote Name.
3. Select the Addresses or Contacts radio button to list the address or the contact information in the search results.

Enter a Customer name or search for a customer. Enter a keyword to search on, or the first three characters of a keyword and click Go. The list of customers will display. You can select a customer from this list, or search for another customer.

4. Enter the Contact Name. Enter the appropriate contact name in the contact fields and click Go. The list of contacts will display. You can select a contact, or search for another contact.
5. Enter the Expiration Date for the quote.
6. Select the Primary Salesperson.
7. Select the Sales Channel.
8. Select the Order Type.
9. Select the associated Agreement.
10. Select the Currency type.
11. Select a Price List.
12. Enter any flexfield information, if applicable
13. Click **Apply** to display additional tabs.

14. Click the Lines tab to add product lines, or to add a service to a product. Click **Add New Product** to search and select products for the quote.

If you want to add a service item (for example, Warranty) to an existing product line, highlight the specific line by clicking the radio button associated with the product line, click **Add Services**, and search or select a service item to be attached to the product line. You will only be able to add service item lines for product lines are serviceable items.

15. Click the Addresses tab to add shipping and billing addresses, and manage payment terms. These addresses will default depending on the customer you entered when creating the quote.
16. Click the Sales Team tab to add new members to the sales team.
17. Click the Sales Credits tab to give credits for the appropriate sales representative.
18. Click **Apply** to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.
19. Click **Save** to save the quote.

If needed, click **Cancel** to cancel the creation of the quote.

Note: After saving a Quote the Notes and Tasks tabs become available.

5.2 Updating a Quote

Steps

To update an existing quote:

1. In the Quote tab, click the name of the quote. The Quote Details window opens.
2. Click **Apply** to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.
3. Click **Save** when you have completed your changes.

If needed, click **Cancel** to cancel the update of the quote.

5.3 Quote Approvals

If you have approvals established for the Quoting application, the Initiate Approvals button will appear in the Approvals tab of the Quote Details window. If the status transition is to get an Approval, the user can hit the Initiate Approvals button for the approvals process to take place. The Quote must be synchronized for the approvals process to begin. No approval rows are displayed in the Approvals tab of the Sales Offline, Quote Details window.

5.4 Place Order

The Place Order button will highlight on the Sales Offline, Quote Details window if the Place Order status transition is established in the Quoting application.

Managing Forecasts

Sections in this chapter include:

- [Section 6.1, "Opportunity Worksheet"](#)
- [Section 6.2, "Product Category Worksheet"](#)
- [Section 6.3, "Generating Forecasts"](#)
- [Section 6.4, "Viewing and Submitting Forecasts"](#)

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

You will use worksheets to create forecasts. The worksheets are:

- **Opportunity Worksheet:** Opportunity-level forecasting provides a tool for sales representatives to use to create their own view of, and commitment to, sales opportunities for themselves and others on the sales team. Opportunity forecasting also gives sales representatives the ability to review, modify, and commit at a more detailed product category level.
- **Product Category Worksheet:** Forecasting at the Product Category level provides sales representatives access to their pipeline aggregated into product groupings. They can then forecast their sales at the product level by rolling up opportunity lines into product groupings.

You can perform the following functions from the Forecast tab:

- Generate forecasts and submit forecasts
- View opportunity level worksheets
- View product category worksheets

- View generate forecast values

6.1 Opportunity Worksheet

Opportunity Level Forecasting provides a tool for sales team members to view their opportunities being forecasted. Worksheets are submitted with the generated forecasts chosen for submission.

Steps

To view opportunity worksheets:

1. From the Forecast tab, click the Opportunity subtab.
The Opportunity Worksheet window opens.
2. Select the Sales Group, for which you want to view forecast.
3. Select the Period Name.
4. Select one of the following options:
 - **Use Previously Saved Values:** If you are forecasting for the first time, the value is based on the Oracle Field Sales profile preferences. If you have saved an opportunity worksheet, those values will default.
 - **Use Pipeline Default Values:** 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.

You can edit the forecast values by highlighting the cells (Worst Case, Forecast, Best Case) and adding the value. The forecast numbers will reflect the opportunity forecast data available in Sales Offline.
5. Click **Save** to save your Opportunity worksheet.

6.2 Product Category Worksheet

Forecasting at Product Category level gives sales team members an easy way to view their pipeline aggregated into product groupings. Worksheets are submitted with the generated forecasts chosen for submission.

6.2.1 Viewing Product Level Forecasts Using Product Category Worksheets

Steps

To view product level forecasts using product category worksheets:

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

The Product Category Worksheet window opens.

2. Select the Sales Group, for which you want to forecast.
3. Select the Period Name.

The forecast numbers will reflect the opportunity forecast data available in Sales Offline.

4. You can edit the forecast values by highlighting the Worst Case, Forecast, or Best Case cell and adding in the value.

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
5. Click **Save** to save your Product Category worksheet.

6.3 Generating Forecasts

Under the Forecast tab, you will find the Generate Forecast subtab. Sales representatives can generate individual forecasts for multiple periods from this window. Forecasts are generated based on their current downloaded pipeline values. Users can forecast based on their default currency.

Steps

To generate a forecast:

1. From the Forecast tab, click the Generate Forecast subtab.
2. Select a sales group from the drop down list.
3. Select the "From Period" and "To Period".
4. Click **View**.

The values generated for your forecast are displayed.

5. Select all periods for which you want to generate forecasts by selecting the check box.

The forecast is now ready to be submitted when you synchronize. Only the most recent submission is accepted. You cannot submit more than one forecast per synchronization.

6. Click **Submit**.

6.4 Viewing and Submitting Forecasts

Steps

To view Forecasts:

1. From the Forecast tab, click the Forecast subtab.
2. Select the Sales Group.
3. Select the Period Name.
4. The forecast numbers will reflect the opportunity forecast data available in Sales Offline.
5. You can edit the forecast values by highlighting the Best Case, Forecast, or Worst Case cell and adding in the value.
6. Click **Submit**.

The forecast is now ready to be submitted when you synchronize. Only the most recent submission is accepted. You can not submit more than one forecast per synchronization.

Managing Customers

Sections in this chapter include:

- Section 7.1, "Organization Subtab"
- Section 7.1.1, "Creating a Customer - Organization"
- Section 7.1.2, "Updating a Customer - Organization"
- Section 7.2, "Contact Subtab"
- Section 7.2.1, "Creating a Customer - Contact"
- Section 7.2.2, "Updating a Customer - Contact"
- Section 7.3, "Person Subtab"
- Section 7.3.1, "Creating a Customer - Person"
- Section 7.4, "Updating a Customer - Person"

The Customer tab is comprised of three subtabs, Organization, Contact and Persons. By default, the Customer tab opens to the Organization window. Click the Contact subtab to open the Contact window, or the Persons subtab to open the Persons window. A person may be a contact for an organization. An Organization may have one or more contacts.

Use the Customer tab to create and maintain the following:

- Organizations
- Contacts

- Persons

Note: There is Flexfield support for the customer module. If Flexfield functionality has been implemented for an organization or contact, the Flexfield name, field, and Flexfield button will display.

7.1 Organization Subtab

The Organization subtab displays:

- Organizations
- Customer Category
- Address
- Phone
- Organization

You can use the Organization subtab to perform the following tasks:

- Create organizations
- Maintain organization details
- Create and maintain address information
- Create notes
- Manage tasks

7.1.1 Creating a Customer - Organization

Steps

To create an organization:

1. In the Customer tab, Organization subtab, click **Create**. The Create Organization window opens.
2. Enter the Organization name.
3. Enter the phonetic Pronunciation of the organization name.
4. Enter any Alias for the organization.
5. Enter the DUNS Number for the organization.

6. Enter the Phone Number for the organization.
7. Enter the Tax ID for the organization.
8. Enter the Email Address for the organization.
9. Select the Customer Category.
10. Enter the Business Line for the organization.
11. Enter the Annual Revenue number for the organization.
12. Enter the Total Employees in the organization.
13. Select the Fiscal Year End for the organization.
14. Enter the Years Established.
15. Enter the URL for the organization's Website.
16. Enter any flexfield information, if applicable.
17. Click the Addresses tab to manage addresses for the organization.
18. Click **Create Address** to add a new address. Enter the required fields (an address type) and click **Save** to save the address information.
19. Click the Notes tab to enter notes.
20. Click **Save** to create a new organization.

If needed, click **Cancel** to cancel the customer information.

After you click Save, the Sales Team and Task tabs are available when you open the Organization Details.

7.1.2 Updating a Customer - Organization

Steps

To update information for an organization:

1. In the Customer tab, Organization subtab, click the name of the organization.
2. Update any fields as needed.
3. Click the Addresses tab to add new addresses for the person.
4. Click the Sales Team tab to add or remove sales team members.
5. Click the Notes tab to enter notes.

6. Click the **Tasks** tab to review tasks.
7. Click **Save** when you are done making changes.
If needed, click **Cancel** to cancel the update of the customer information.

7.2 Contact Subtab

The Contact summary page displays:

- Person name (hyperlinked to Person Details)
- Relationship (hyperlinked to Contact Details)
- Customer
- Phone
- Email

You can use the Contact subtab to perform the following tasks:

- Create a contact
- Maintain contact details
- Add and maintain contact address information
- Create notes
- Manage tasks

Click the Relationship link to view Contact Details; click the Person link to view Person Details.

7.2.1 Creating a Customer - Contact

Steps

To create a contact:

1. In the Customer tab, Contact subtab, click **Create**.
The Create Contact window opens.
2. Select a Contact. You can select an existing contact from the list of contact names in the Contact Name drop-down menu, or specify a new Contact name by clicking **New**.

To create a new contact, click **New**. The Create Person window opens. See the [Person Subtab](#) for details.

3. Click **Save** to create the new contact. The newly created contact is now available for you to add to an existing organization.

4. Select Organization.

If the organization is new, click **New** next to the organization field to create new organization. Refer to [Organization Subtab](#) for details on creating an organization.

5. Select a Relationship Type.
6. Enter the Phone Number for the contact.
7. Enter the Email Address for the contact.
8. Enter the Department of the contact.
9. Select the Department type.
10. Enter the Job Title.
11. Select the Job Title Type for the contact.
12. Select the Preferred Language for the contact.
13. Specify if the contact is a Decision Maker or a Reference.
14. Enter any flexfield information, if applicable.
15. Click **Add an Address** in the Addresses tab to add new addresses for the contact. A list of addresses associated with the organization will appear. Choose an address and click **Select**. The Add a Relationship Address window appears allowing you to add address types.
16. Click the Notes tab to enter notes.
17. Click **Save** to create a new contact.

If needed, click **Cancel** to cancel the creation of the contact.

7.2.2 Updating a Customer - Contact

Steps

To update information for a contact:

1. In the Customer tab, Contact subtab, click a contact name. The Contact Detail window opens.
2. Update any fields as needed.
3. Click the Addresses tab to add new addresses for the person.
4. Click the Classifications tab to select a classification category and a classification status.
5. Click the Sales Team tab to add or remove sales team members.
6. Click the Notes tab to enter notes.
7. Click the Tasks tab to review tasks.
8. Click **Save** to commit your changes.

If needed, click **Cancel** to cancel the update of the contact.

Note: After saving a Customer update, the Tasks tab becomes available.

7.3 Person Subtab

The Person summary page displays:

- Person name (hyperlinked to Person Details)
- Address
- Phone
- Email

You can use the Person subtab to perform the following tasks:

- Create a person
- Maintain person details
- Create and maintain product interests
- Create and maintain classifications address information
- Create and maintain notes
- Create and maintain sales team
- Create and maintain notes

7.3.1 Creating a Customer - Person

Steps

To create a person:

1. In the Customer tab, Person subtab, click **Create**.
The Create Person window opens.
2. Enter the person's name. This includes last name, first name, preferred name, last and first name pronunciation, and middle name.
3. Enter any title and second title (if applicable).
4. Enter any suffix (such as Jr.).
5. Enter date of birth for the person.
6. Select a gender.
7. Select native language.
8. Enter phone number.
9. Enter E-mail address.
10. Select a status for the Person.
11. Enter any flexfield information, if applicable.
12. Click **Create Address** in the Addresses tab to add new addresses for the person. A list of addresses associated with the organization will appear. Choose an address and click **Select**.
13. Click the Notes tab to enter notes.
14. Click **Save** to create a new person.

If needed, click **Cancel** to cancel the creation of the person.

Note: After saving a Person, the Product Interest, Classifications, Sales Team, and Tasks tabs become available.

7.4 Updating a Customer - Person

Steps

To update information for a person:

1. In the Customer tab, Person subtab, click a person name. The Person Detail window opens.
2. Enter Product Interests.
3. Click the Addresses tab to add new addresses for the person.
4. Click the Classifications tab to select a classification category and a classification status.
5. Click the Sales Team tab to add or remove sales team members.
6. Click the Notes tab to enter notes.
7. Click the Tasks tab to review tasks.
8. Click **Save** to commit your changes.

If needed, click **Cancel** to cancel the update of the person.