

Oracle® TeleSales

User Guide

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Oracle TeleSales User Guide, Release 11i

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Oracle TeleSales User Guide, Release 11i

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Oracle 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

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

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

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

If you have never used Oracle TeleSales, Oracle suggests you attend one or more of the Oracle TeleSales 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.

How To Use This Guide

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

- [Chapter 1](#) provides an introduction to Oracle TeleSales.
- [Chapter 2](#) discusses the Oracle TeleSales business user flows.
- [Chapter 3](#) contains procedures and information about searching.
- [Chapter 4](#) contains procedures for maintaining customer information.
- [Chapter 5](#) covers recording relationships.

- [Chapter 6](#) discusses working with leads.
- [Chapter 7](#) covers tracking opportunities.
- [Chapter 8](#) provides information about orders, quotes, and proposals.
- [Chapter 9](#) contains procedures to use while interacting with the customer.
- [Chapter 10](#) covers how to use the application with Oracle Advanced Inbound or Oracle Advanced Outbound.
- [Chapter 11](#) discusses enrolling in events.
- [Chapter 12](#) provides information about sending collateral.
- [Chapter 13](#) provides information on using notes.
- [Chapter 14](#) provides information on using tasks.
- [Appendix A](#) covers customizing your application with personal preferences.

Documentation Accessibility

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Accessibility of Links to External Web Sites in Documentation

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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 TeleSales.

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 TeleSales 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 TeleSales.

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

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

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle TeleSales (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 TeleSales Implementation Guide

This guide explains how to implement the features of Oracle TeleSales. Many of the procedures and explanations in this guide can be used to administer the application after the product is implemented.

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

Multiple Organizations in Oracle Applications

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

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 TeleSales 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 Common Application Components Implementation Guide

Many CRM products use common application components. Use this guide to correctly implement common components.

Training and Support

Training

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle TeleSales 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 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.

Introduction to Oracle TeleSales

This chapter discusses the key features and integrations of Oracle TeleSales. Sections in this chapter include:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Oracle TeleSales Key Features"](#)
- [Section 1.3, "Oracle TeleSales Integrations"](#)
- [Section 1.4, "What's New in This Release"](#)
- [Section 1.5, "What's Obsolete in This Release"](#)
- [Section 1.6, "Accessing the Oracle TeleSales eBusiness Center"](#)
- [Section 1.7, "Accessing Leads, Opportunities, and Other Work from Your Work Queue"](#)
- [Section 1.8, "Accessing Reports"](#)
- [Section 1.9, "The eBusiness Center"](#)
- [Section 1.10, "Summary of Oracle TeleSales Tasks"](#)

1.1 Overview

Oracle TeleSales is an application designed for interaction center professionals, whether they are inbound or outbound telesagents. The application provides a versatile set of tools to manage the sales cycle, from prospecting to booking orders. Oracle TeleSales offers a true multi-channel selling and servicing solution that leverages all channels. The E-Business Center within Oracle TeleSales offers a complete cross-application desktop for all Oracle call center applications. The E-Business Center provides elements of Service and Collections for an unparalleled customer view. Key functions include contact, lead, opportunity, quote, and order management; event registration; and collateral fulfillment. Oracle TeleSales is part of the Oracle E-Business Suite, an integrated set of applications that is designed to transform your business into an e-business.

The customer model used by Oracle TeleSales treats any relationships you enter between individuals and organizations as a separate party in the database. For example, when the user creates a new record for Jim Jones, CEO of Acme Corp. the application creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

You will be using four main windows to do most of your work. All four windows can be launched directly from the Navigator:

- Universal Work Queue

Use this window to view a list of your open leads, opportunities, and daily tasks. You can perform actions in the Action section of the window such as updating an opportunity. The work queue serves also as a launching pad for the rest of the application. Select a lead you want to view and edit, for example, click the Get Work button, and the lead opens up in the Lead Center window where you can start work right away.

- eBusiness Center

Use the eBusiness Center as the central work area for Oracle TeleSales when you are on the phone with your customer.

Use it to create and manage customer records, to send out collateral, enroll your customers in events, and launch the Oracle Quoting - Forms or Oracle Order Management windows where you prepare quotes and orders.

The eBusiness Center also gives you a fast way to enter the basic information for leads and opportunities.

- Lead Center

Use the Lead Center to manage the details of a specific lead. You can use this window to create new leads or to add more detail to leads you have created using the eBusiness Center.

- Opportunity Center

Use the Opportunity Center to create and manage individual opportunities until they close. This includes managing the sales team and partners for the opportunity. You can use this window for such tasks as entering purchase interests, forecast dates, partners, and sales credits for the sales team and any partners for the opportunity.

There are additional work areas you will use periodically.

- Search

Universal Search provides quick or detailed searches and displays the selected search results in the related application window.

- Reports

The Reports option in the Navigator take you to the reports in HTML. Reports provide information on leads, opportunities, forecasts, and compensation, among others.

- Sales Tool

The sales tool within the Forms login takes you to HTML tools such as forecasting and compensation.

For an understanding of the Oracle TeleSales user interface including detailed explanations of standard features such as attachments, folders, and search methods, see the *Oracle Applications User's Guide*.

1.2 Oracle TeleSales Key Features

Oracle TeleSales includes the following key features:

- Customer and contact management
 - Organization, Person, and Relationship profile
 - Complex relationships
 - Address and contact points
 - Contact restrictions
 - AR account management
 - Configurable dashboard of key business indicators
 - Targeted campaigns and interaction history
 - Notes
- Lead Management
 - Flows from Oracle iStore and other sources
 - Auto lead qualification and ranking
 - Manual or real time automated assignment via flexible territory definition
 - Lead import facility
 - Sharing of leads across sales team
 - Conversion of lead to opportunity
- Opportunity Management
 - Deal size, sales stage, percentage win, and projected closing date
 - Obstacles and sales credits
 - Support for sales methodologies
 - Line level forecasting
 - Sharing of opportunity across sales team including partners
 - Pipeline management
 - New quotes generated from opportunities
- Event Registration and Collateral Fulfillment

- Event registration
- Open registration tracking
- Hard or soft collateral fulfillment
- Fulfillment via e-mail or fax
- Event registration and collateral request history
- Forecast Management
 - Global forecasting
 - Product and opportunity level forecasting
 - Forecast worksheets
- Quote and order management
 - View and create quotes and orders
 - Validate credit card purchases via Oracle iPayment
 - Global Availability To Promise (ATP) check
 - Calculate sales tax, discounts, freight
 - Exchanges
 - Manual price adjustment and tax exemption
 - Product configuration
 - Leverage upsell, cross-sell opportunities
- Computer telephony integration (CTI)
 - Integrates seamlessly with Computer Telephony Integration/Automated Call Distribution (CTI/ACD) systems and IVRs
 - Inbound screen pops and multi-ANI matches
 - Preview, Progressive, and Predictive Dialing
- eBusiness Center
 - Single UI to support the universal agent
 - Service requests
 - Delinquencies
 - Contracts

- Install base
- Personal productivity
 - Scheduling and calendar features
 - Work queue for managing to-dos
 - Quick and expanded search
- Relationship Plan
 - Expiring opportunity alert
 - Expiring quote alert
 - Contact restriction alert for customer who does not want to be contacted by phone

1.3 Oracle TeleSales Integrations

Oracle TeleSales integrates with the following modules:

Oracle Collections

The eBusiness Center provides a view of delinquency information and the ability to open the Collections window to view details.

Oracle Contracts

The eBusiness Center provides a view of contract information and a drill down to a contract.

Oracle Customer Care

Relationship plans provide consistent alerts for expired opportunities, expired quotes, and contact restrictions.

Oracle eMail Center

Oracle eMail Center provides the ability to click a customer's e-mail address to open a message and records the sent message as an interaction.

Oracle iMeeting

A web collaboration meeting can be started from the eBusiness Center, the Opportunity Center, or from the Lead Center.

Oracle Install Base

Oracle Install Base provides install base information for the party in the eBusiness Center.

Oracle Interaction Center

Oracle Interaction Center provides inbound and outbound call routing, predictive dialing, and call scripting functionality.

Oracle iStore

Oracle iStore provides interactive selling on the web.

Oracle Marketing

Oracle Marketing provides a true closed-loop marketing solution from campaign to cash. It is needed for event registration and collateral fulfillment.

Oracle Order Management

Oracle Order Management provides the ability to view existing orders and create new orders.

Oracle Quoting

Oracle Quoting provides the ability to create quotes.

Oracle Field Sales

Oracle Field Sales provides collaborative selling between the field sales and inside sales organizations.

Oracle TeleService

The eBusiness Center provides a view of a party's service requests and the ability to view details for a service request.

1.4 What's New in This Release

This document describes functionality delivered in the Oracle E-Business Suite 11.5.10 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 *OracleMetaLink* for relevant product patches and documentation.

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

- [Section 1.4.1, "Customer Module Enhancements"](#)
- [Section 1.4.2, "Universal Work Queue Enhancement"](#)
- [Section 1.4.3, "Scripting Enhancement"](#)
- [Section 1.4.4, "Enhanced Product Hierarchy"](#)
- [Section 1.4.5, "Territory Assignment Enhancements"](#)
- [Section 1.4.6, "Enhanced Interaction Wrap-Up"](#)
- [Section 1.4.7, "Expanded Marketing Source Code Selection"](#)
- [Section 1.4.8, "Sales Campaign Flow Support"](#)
- [Section 1.4.9, "Proposal Generation"](#)
- [Section 1.4.10, "Business Events"](#)
- [Section 1.4.11, "Diagnostics Support"](#)

1.4.1 Customer Module Enhancements

Online Fuzzy Match

The TCA SmartMatch utility is used to prevent duplication of data during the creation process and to assist in finding and identifying an existing party using matching logic.

Relationship Role

The new Relationship Role uses relationships from TCA and describes the role one entity plays in relation to another entity. The role represents a unique combination of the relationship code, the subject (organization or person), and the object (organization or person).

For example, both organizations and people have contacts. Both could have the relationship code *Has Contact*. The role *Organizations with Contacts* represents an organization as the subject, a person as the object, and the relationship *Has Contact*. The role *People with Contacts* represents a person as the subject, a person as the object, and the relationship *Has Contact*.

1.4.2 Universal Work Queue Enhancement

Personal Work List

Agents can create their own lists using Universal Search. These personal lists now appear in a new work node in Universal Work Queue and can be processed using the work panel.

1.4.3 Scripting Enhancement

Resuming Suspended Scripts

Agents who follow scripts during a call are not always able to fully complete the script. Incomplete scripts are held in suspension including any information entered by the agent, and when the customer is contacted again the script is available to be resumed at the point the agent left off.

1.4.4 Enhanced Product Hierarchy

The current implementation of product categories available in prior releases of Oracle TeleSales allows for three levels of hierarchy: interest type, primary code, and secondary code. In this release the product hierarchy has been expanded to support multiple levels of product categories. The system will allow administrators to define multiple levels based on implementation needs. Agents select product categories for leads, opportunities, and contact interests.

1.4.5 Territory Assignment Enhancements

Additional Qualifiers

There are three new qualifiers you can use when defining sales territories: DUNS Number, SIC Code, and Sales Channel.

Partner Resource Assignment

The assignment of resources now includes partners and partner contacts. The indirect channel can now be part of the mainstream territories creation process and can therefore take advantage of the automatic assignment of indirect resources to the customer sales team.

1.4.6 Enhanced Interaction Wrap-Up

New in this release is the ability to default the outcome, result, and reason at the interaction activity level. Several seeded default outcome/result/reasons are provided for combinations of activity-activity item. The system administrator can configure additional defaults if necessary. This enhancement significantly reduces the amount of time required to wrap up a call thereby increasing productivity.

1.4.7 Expanded Marketing Source Code Selection

The number of marketing sources available to select is expanded. The new source code *One-off Event* enhances the tracking of the effectiveness of campaigns and events.

1.4.8 Sales Campaign Flow Support

The marketing application in 11.5.10 enables sales as well as marketing users to create activities that cross sell and up-sell products to customers in sales territories. These activities will be executed using the sales applications. When a sales initiative is launched, leads are generated for sales follow up. The territory assignment program assigns the appropriate sales reps to the leads and when these leads are converted to opportunities these sales campaigns are carried over to the opportunity allowing the marketing and sales organizations to track the progress and success of these initiatives.

1.4.9 Proposal Generation

Agents can create proposals from an opportunity.

1.4.10 Business Events

Some standard events such as update opportunity and submit forecast are already registered. Administrators can set up these events in custom workflows to follow their business processes.

1.4.11 Diagnostics Support

Implementers and administrators can perform diagnostics using a user-friendly user interface and take necessary remedial actions. The application will check some of the common problems found in the application with regard to setup issues and application data issues and provide the necessary recommendations to the administrators.

1.5 What's Obsolete in This Release

This section covers what is now obsolete in Oracle TeleSales.

- Relationship Type is replaced with Relationship Role
- Interest Type, Primary Interest Code, and Secondary Interest Code are replaced with the new multi-level Product Category.
- Transaction Counts and Deal Sizes Report
- Pipeline Buckets by Range Report
- Account Classification Report
- Unassigned Opportunities Report
- Event Attendees Report
- Event Information Report
- Missing Territory Assignments Report
- Territory No Access Report
- Accesses Report

1.6 Accessing the Oracle TeleSales eBusiness Center

The eBusiness Center is your central work area.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

TeleSales Manager

Telemarketing Agent

Other non-sales responsibilities also have access

Steps

1. In the Navigator, choose **eBusiness Center**.

The Choose Role and Group window appears. (If your personal profile options *OTS: Default User Role* and *OTS: Default User Group* are set, then this window does not appear.)

2. Choose your role from the LOV.
3. If your role type is TeleSales, Field Sales or Partner Relationship Management, then choose your sales-related group from the LOV.

The eBusiness Center appears. Only users who are members of a sales group are able to create leads and opportunities. Non-sales users can create and update customer records.

Guidelines

If you are accessing the eBusiness Center as a salesperson, then your sales group usages must include *Sales* or *TeleSales*.

1.7 Accessing Leads, Opportunities, and Other Work from Your Work Queue

Use this procedure to access work assigned to you from your work queue. There are two Universal Work Queue windows available, one with the queue listed on one side of the window, and the other with the choices in a cascading menu. For more information about using the work queue, please see *Oracle Universal Work Queue* documentation.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

TeleSales Manager

Telemarketing Agent

Steps

1. Choose Universal Work Queue from the Navigator or click the Work Queue button from the toolbar. The button shows an icon of a miniature wall calendar:



The Universal Work Queue window appears.

Either the side Queue pane or the cascading menu lists the categories of items in your queue. The following are used by Oracle TeleSales:

- **Inbound:** Inbound calls.
 - **Outbound:** Outbound calls.
 - **My Leads (Owner):** All leads you own.
 - **My Leads (Sales Team):** All leads where you are a member of the sales team.
 - **My Opportunities (Sales Team):** All opportunities where you are on the sales team.
 - **My Opportunities (Sales Credits):** All opportunities for which you receive sales credit.
 - **Marketing List - Manual Assigned:** This category displays lists of people for you to contact organized by marketing schedules. Clicking a list displays only those people on the list you were manually assigned.
 - **Marketing Lists:** This category displays lists of people for you to contact organized by marketing schedules. Clicking a list displays only those people on the list you are authorized to access.
 - **Personal List - Contacts:** This category displays the saved lists of persons or contacts from organizations (party relationship) for you to contact.
 - **Personal List - Opportunities:** This category displays the lists of opportunities that you want to work on currently.
2. Select the category of tasks you want to view. For example, selecting My Leads displays all leads you own in a list.
 3. Click one or more items and the work panel changes according to what you selected.

4. Double-click an item you want to work on or select it and click the Get Work icon.

The item launches in the appropriate section of the application.

For example, double-clicking a lead launches that lead in the Lead Center.

1.8 Accessing Reports

You can launch a variety of reports, including reports on your pipeline, revenue, leads, and opportunities, directly from the Navigator. The reports, which are located under the Reports heading, open in a separate browser window. See *Oracle Field Sales User Guide* for more information.

1.9 The eBusiness Center

The eBusiness Center is divided into four functional areas:

1. Header

The header displays basic customer information including the primary address and phone number for the party you are viewing. Although you can enter basic information about the party here, most of the entries are done in the tabs.

The Party Type drop-down list determines what type of customer information you can view and enter.

The Next Call icon ends your interaction and wrap-up automatically using default values and takes your next call.

2. Profile

This region, located to the right of the header, gives key information about the organization, consumer, or organizational contact you select using the View Details For options. The information in the Profile region comes from the tabs. This region is folder-enabled. This means that you can customize the presentation of data using standard Oracle Folder tools.

3. View Details For Drop Down List

Selecting one of the items in the list determines what information appears in the tabs. For example, if you select the name of the person and enter a phone number in the Address/Phone tab, then this phone number is stored in the database linked to the record of the party of Person (consumer).

If you enter the same phone number after selecting the name of the person and the organization, then this number is linked to the Party Relationship party in the database and is not visible when you are looking at the phone numbers for the party of Person.

The account that appears in View Details For is the account selected in the header.

For example, if the header displays information on Jack Jones, the purchasing manager for the ABC Company, then the list contains the party types you can view and edit using the tabs:

You can select:

- **Jack Jones:** To enter and view information that pertains to Jack Jones, the party type Person. This includes all personal information as well as any purchases he makes as a consumer.
- **ABC Company:** To enter and view all information about the ABC Company, the party type organization. This includes organizational details as well as all leads, opportunities, quotes, and orders. Leads, quotes, and orders are tied to the organization and not the contact.
- **Jack Jones -- ABC Company:** To view and enter phone numbers, addresses and other information for Jack Jones when he acts in his capacity as employee of the ABC Company (party type of Party Relationship).
- **ABC Company -- 1000:** To view interactions for the party owning the account.

4. Tabs for Entering Transactions and Details About the Customer

You use tabs to enter and manage detailed information on the customer displayed in the header. How the information you enter here is stored in the database depends on the View Details For you selected.

1.10 Summary of Oracle TeleSales Tasks

Use Oracle TeleSales to perform the following types of tasks:

- [Chapter 3, "Searching"](#)
- [Chapter 4, "Maintaining Customer Information"](#)
- [Chapter 5, "Recording Relationships"](#)
- [Chapter 6, "Working with Leads"](#)

- Chapter 7, "Tracking Opportunities"
- Chapter 8, "Quotes, Proposals, and Orders"
- Chapter 9, "Interacting with the Customer"
- Chapter 10, "Advanced Inbound and Advanced Outbound Integration"
- Chapter 11, "Enrolling in Events"
- Chapter 12, "Sending Collateral"
- Chapter 13, "Using Notes"
- Chapter 14, "Using Tasks"

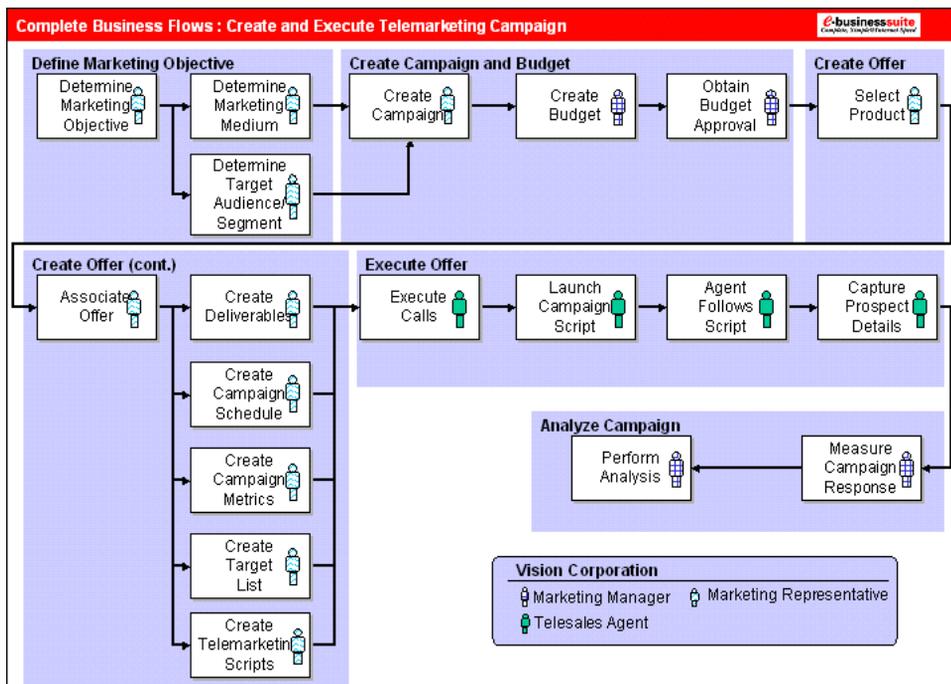
Oracle TeleSales Business User Flows

The following charts show business process flows that include Oracle TeleSales.

- [Section 2.1, "Process flow to Create and Execute a Telemarketing Campaign"](#)
- [Section 2.2, "Process Flow to Create and Execute a Marketing Event"](#)
- [Section 2.3, "Process Flow to Execute Campaign to TeleSales"](#)
- [Section 2.4, "Process Flow for Inbound Call to Lead"](#)
- [Section 2.5, "Process Flow for Lead to Opportunity"](#)
- [Section 2.6, "Process Flow for Opportunity to Forecast"](#)
- [Section 2.7, "Process Flow for Opportunity to Order"](#)
- [Section 2.8, "Process Flow for Product Trade-in to Order"](#)

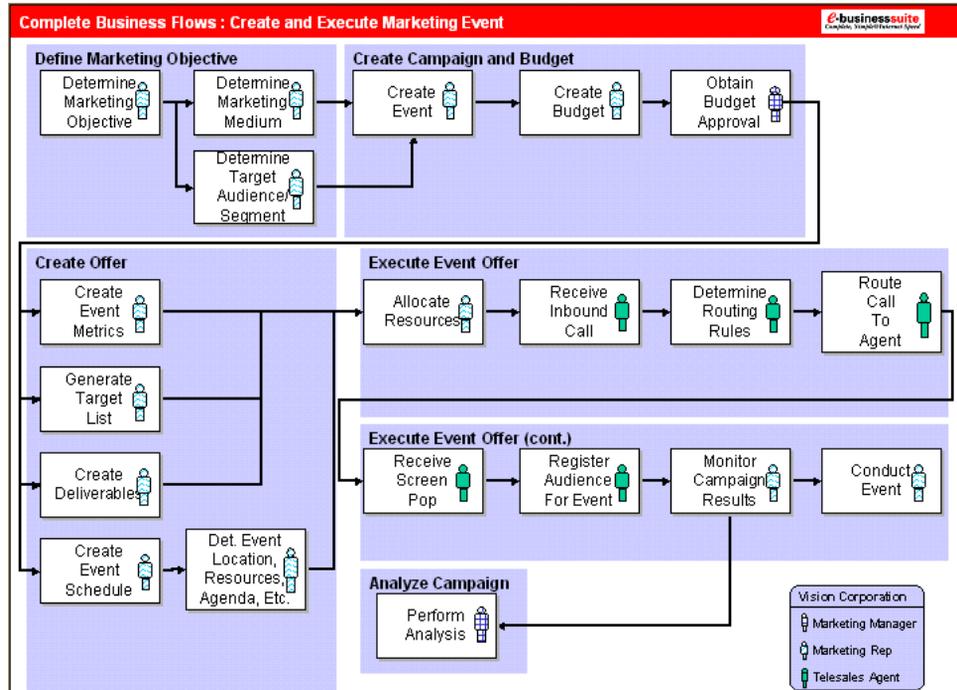
2.1 Process flow to Create and Execute a Telemarketing Campaign

The following chart shows the creation and execution of a telemarketing campaign.



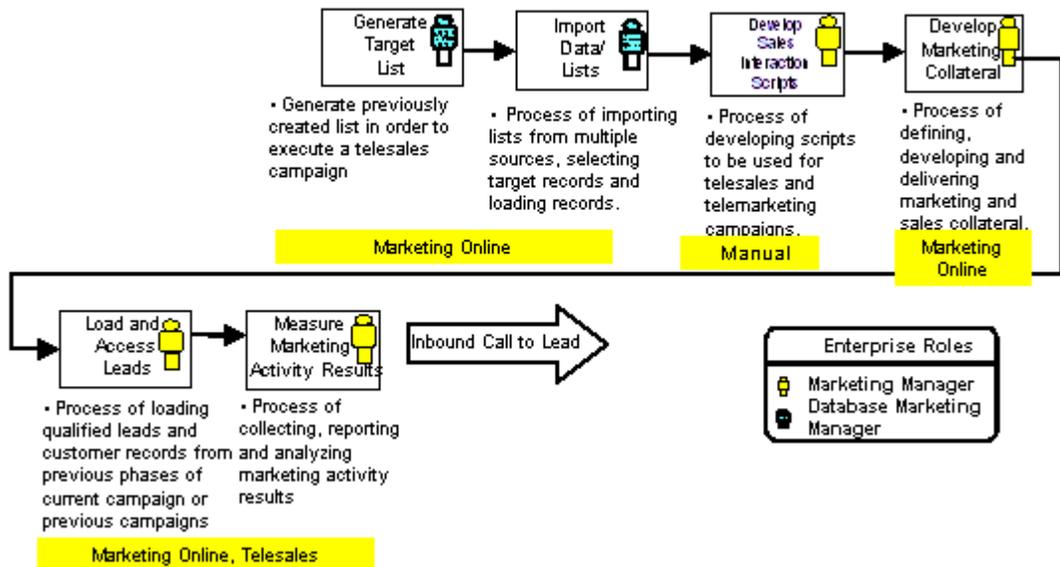
2.2 Process Flow to Create and Execute a Marketing Event

The following chart shows creating a marketing event and the telesales agent registering a customer for the event.



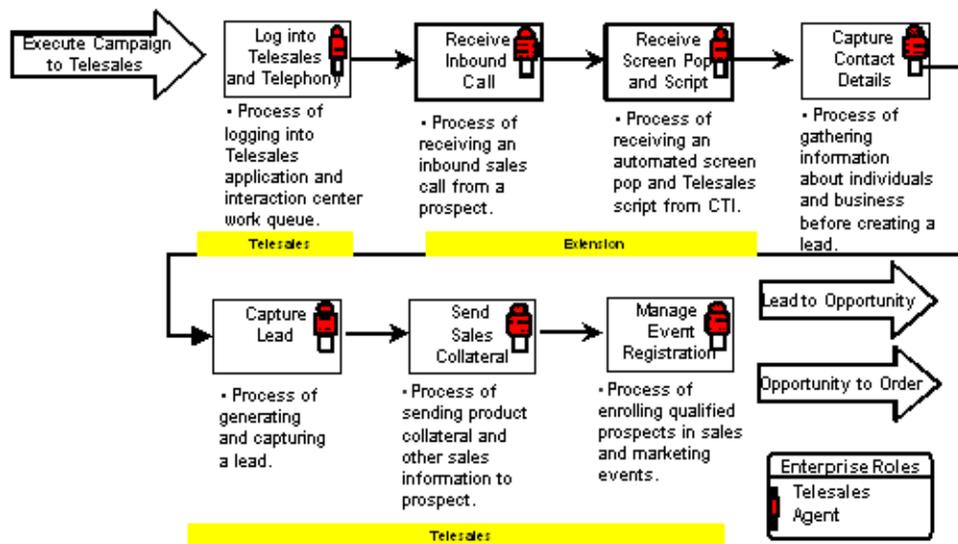
2.3 Process Flow to Execute Campaign to TeleSales

The following chart shows the execution of a marketing campaign to TeleSales.



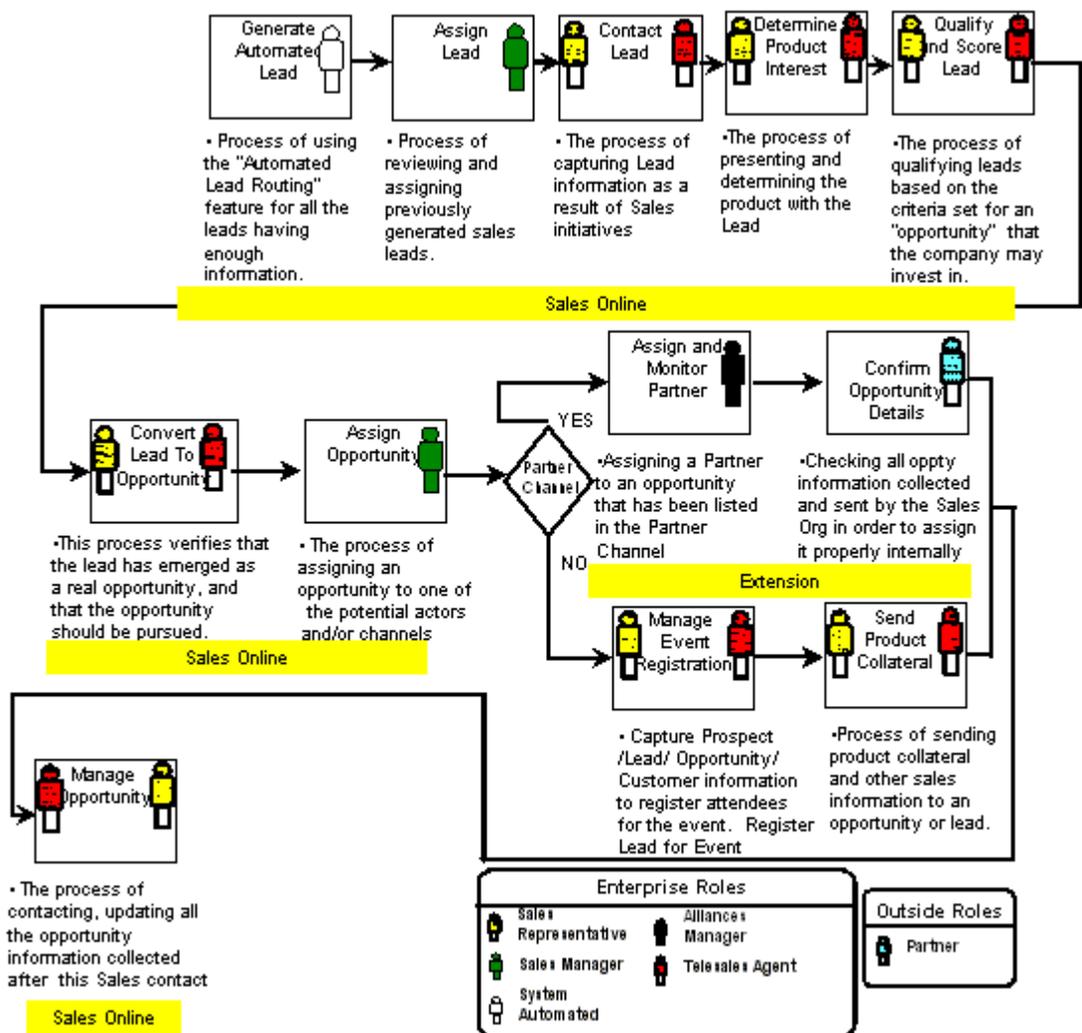
2.4 Process Flow for Inbound Call to Lead

The following chart shows an inbound call being routed according to rules established in Oracle Advanced Inbound. The sales inquiry call is received by a telesales agent, and Oracle TeleSales provides instant information about the caller as well as the script the agent should follow. If the call is a valid lead, then the agent enters information to create a sales lead in the eBusiness Center.



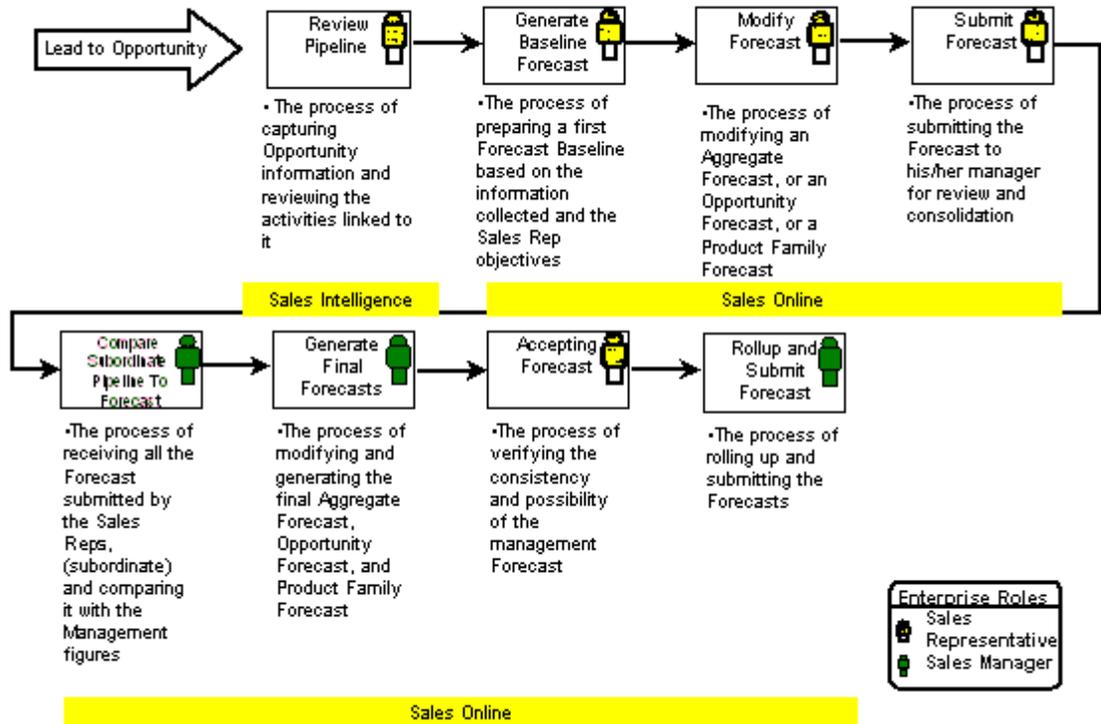
2.5 Process Flow for Lead to Opportunity

The following chart shows a sales or telesales agent changing a lead to an opportunity.



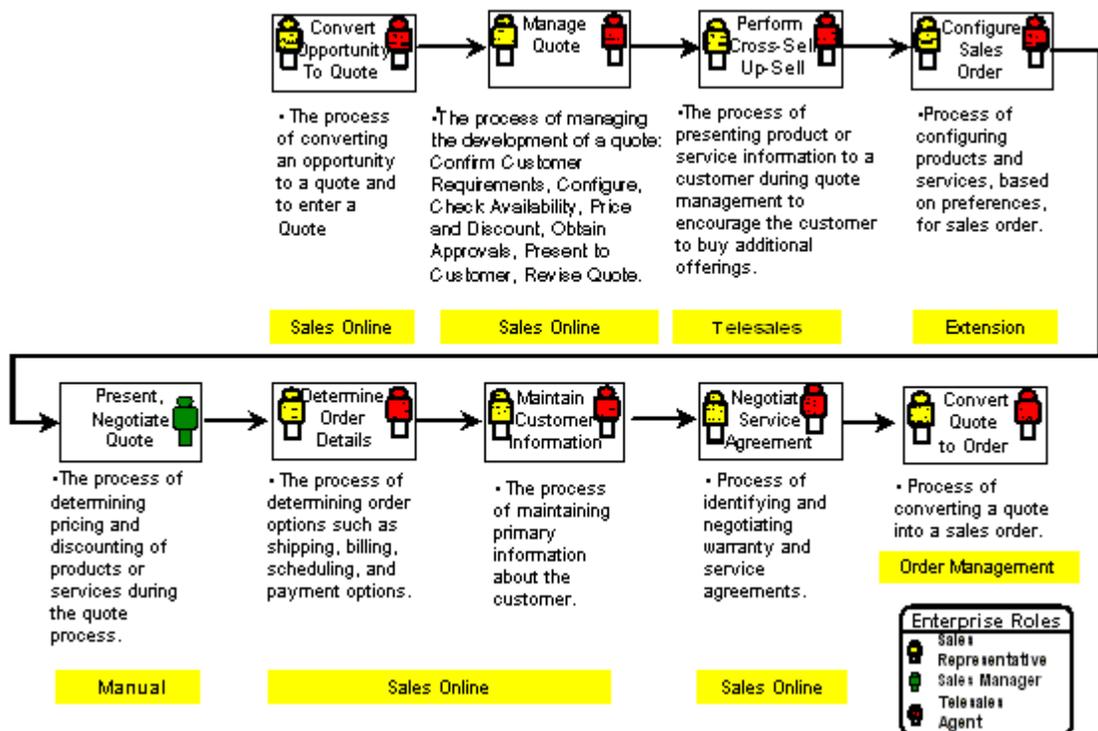
2.6 Process Flow for Opportunity to Forecast

The following chart shows an opportunity assigned to a sales agent being worked and forecasted.



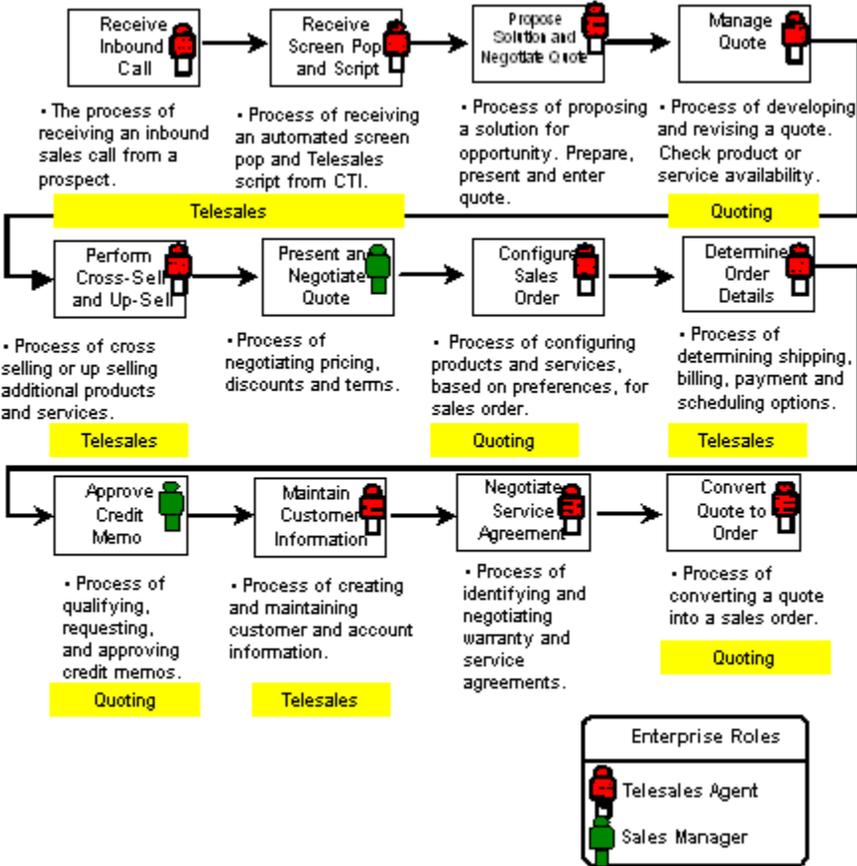
2.7 Process Flow for Opportunity to Order

The following chart shows an opportunity going to quote and then order.



2.8 Process Flow for Product Trade-in to Order

The following chart shows a product trade-in going to quote and then order.



This chapter explains the various ways you can search for information in the application. Sections in this chapter include:

- [Section 3.1, "Overview of Searching"](#)
- [Section 3.2, "Finding Text in Dynamic Tables"](#)
- [Section 3.3, "Performing Quick Searches"](#)
- [Section 3.4, "Performing Expanded Searches"](#)
- [Section 3.5, "Performing a Customer Smart Search"](#)
- [Section 3.6, "Creating a List"](#)
- [Section 3.7, "Updating the List Status"](#)
- [Section 3.8, "Saving a Query for Reuse"](#)
- [Section 3.9, "Searching Using a Query You Have Saved"](#)
- [Section 3.10, "Viewing a List You Have Created"](#)

3.1 Overview of Searching

The fastest way to search the Oracle TeleSales database is to use the Lists of Values (LOVs) provided with many fields.

The Universal Search window provides flexible searching capability. Searches are categorized by type of information, such as leads or opportunities. Within each category you find predefined criteria in the quick searches. The expanded searches provide a wide range of parameters you can use for a more customized search. You can save the results of your search as a list or you can save your query for reuse. You can set the user profile option *OTS: Default Universal Search Tab* to set which tab (Quick Search, Expanded Search, or Saved Results) appears when you open Universal Search.

You can search information displayed in dynamic tables by right clicking in the table and making a selection from a pop-up menu.

Note: Oracle TeleSales does not support the Query Enter / Query Run method of searching common to many Oracle applications.

3.2 Finding Text in Dynamic Tables

You can search information displayed in dynamic tables by right clicking in the table and making a selection from a pop-up menu. You can search all information. This includes text within notes, information entered using the lists of values and drop-down lists, as well as information supplied by the application, such as opportunity numbers and account numbers.

You can recognize a dynamic table by its striped rows and headers.

3.3 Performing Quick Searches

Searches using the Quick Search tab of the Universal Search are optimized for fast retrieval of basic information. Select a search criterion for one of the available queries, fill in the criteria for all the fields, and click Search. You can perform a quick search on an organization, party relationship, person, customer key, lead, opportunity, event, source code, collateral, and quote. The searches range from a last and first name search to a search by different product interests. Use this procedure to search your database using the Universal Search window.

Steps

1. Launch the Universal Search window from the Navigator, or by clicking **Find** in the toolbar. This is the flashlight icon.

The Universal Search window appears.

2. From the Find drop-down list, select the type of information you want to search for.
3. In the Quick Search tab, select the radio button corresponding to the query you want to use.
4. Enter search terms in all fields.

Note: Limit the use of the percent sign to customer-related fields. These include First Name, Last Name, and Organization Name. You can use the percent sign to represent any unknown characters in a search term.

5. If you are searching for a party relationship, organization, person, event, or source code and you want to include inactive records in the search, then select the Include Inactive Records check box.
6. If you are searching for Customer Key, and you want to perform a quick search on Install Base - Instance Name, then select the radio button for the same and enter the phone number (the instance name for business-to-consumer is primarily the phone number) of the customer (or the instance owner).

Note: Instance name is used to track serialized and non-serialized items in Install Base. For more information about the Install Base, please see *Oracle Install Base Concepts and Procedures* manual.

Certain companies may add extra digits in front or at the end of the phone number. In this case, the customer may not have the exact value. To identify the customer in this case, perform partial search or use the LOVs.

7. If you are searching for leads, then select My Leads (Sales Team), My Leads (Owner), or All Leads. (Sales team leads are leads where you are a member of the sales team. Owner leads are leads where the check box Owner is selected for you in the sales team list.)

Note: If the profile option *OS: Lead Access Privilege* is set to Full or Prospecting, then all options are available. If it is set to Sales Team, then you cannot select All Leads.

8. If you are searching for opportunities, then select either My Opportunities (Sales Team) or My Opportunities (Owner).

9. Click **Search**.

The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

10. If you want to view all of the publicly accessible notes associated with an item or create new notes, then click the **View Notes** button in the search results.

11. Select the item in the table and open the relative window in one of the following ways:

- If you want to view this item in a separate window, then select the check box labeled with one of the following: Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.
- If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
- If you want to display one item and close the search window, then click **OK**.
- If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

The application displays an item where appropriate. Customer information appears in the eBusiness Center, leads in the Lead Center, and opportunities in the Opportunity Center. If you called Universal Search from an application other than Oracle TeleSales, then the application that called for the search displays the information.

Guidelines

You can search for partial words and numbers, but you must use the percent sign to indicate missing or unknown characters. For example, a search for j%n in the First

name field retrieves all first names starting with the letter j and ending with the letter n, including John, Jon, and Johann.

The search combines the different search criteria using the logical AND. This means that entering two search criteria returns only results matching both search criteria. For example, searching on a partial name and a partial phone number returns only individuals whose names and phone numbers match both.

3.4 Performing Expanded Searches

Use this procedure to search your database using the Universal Search window. If you require a search based on different sets of search criteria than those available in the Quick Search tab or you want to search by a range of values, then enter queries in the Expanded Search tab instead of performing a quick search.

Steps

1. Launch the Universal Search window from the Navigator, or by clicking **Find** in the toolbar. This is the flashlight icon.
The Universal Search window appears.
2. From the Find drop-down list, select the type of information you want to search for.
3. If you want to use a query you have saved for your search, then see [Section 3.9, "Searching Using a Query You Have Saved"](#) and follow the procedure.
4. Select the Expanded Search tab.
5. Enter search criteria in any of the fields in the Basic region or in the Advanced region, or both. For each search term in the Advanced region:
 - a. Select the search term using the Item List of Values (LOV).
 - b. Enter an operator using the Condition LOV.
 - c. Enter the value of that condition in the Value field.
6. If you are searching for a party relationship, organization, person, event, or source code and you want to include inactive records in the search, then select the Include Inactive Records check box.
7. If you are searching for leads, then select My Leads (Sales Team), My Leads (Owner), or All Leads. (Sales team leads are leads where you are a member of the sales team. Owner leads are leads where the check box Owner is selected for you in the sales team list.)

Note: If the profile option *OS: Lead Access Privilege* is set to Full or Prospecting, then all options are available. If it is set to Sales Team, then you cannot select All Leads.

8. If you are searching for opportunities, then select either My Opportunities (Sales Team) or My Opportunities (Sales Credit.) (Sales team opportunities are opportunities where you are a member of the sales team. Sales credit opportunities are opportunities where you will receive sales credit.)

9. Click **Search**.

The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

10. If you want to view all of the publicly accessible notes associated with an item or create new notes, then click the **View Notes** button in the search results.
11. Select the item in the table and open the relative window in one of the following ways:
 - If you want to view this item in a separate window, then select the check box labeled with one of the following: Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.
 - If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
 - If you want to display one item and close the search window, then click **OK**.
 - If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

The application displays the selected item where appropriate. Customer information appears in the eBusiness Center, leads in the Lead Center and opportunities in the Opportunity Center.

Guidelines

You can search for partial words and numbers, but you must use the percent sign to indicate missing or unknown characters. For example, a search for j%n in the First name field retrieves all first names starting with the letter j and ending

with the letter n, including John, Jon, and Johann. To search without entering characters, enter _%.

The search combines the different search criteria using the logical AND. This means that entering two search criteria returns only results matching both search criteria. For example, searching on a partial name and a partial phone number returns only individuals whose names and phone numbers match both.

3.5 Performing a Customer Smart Search

Use this procedure to search for an organization, person, or contact using the Universal Search window.

Steps

1. Launch Universal Search from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.

The Universal Search window appears.

2. From the Find drop-down list, select Customer Smart Search.
3. Select the Organization, Person, or Contact tab.
4. Enter the search criteria.
5. Click **Search** to run the query.

The Results window appears.

6. If you want to re-enter your search criteria, then click **Clear**.
7. From the Results window, select the item in the table and open the relative window in one of the following ways:
 - If you want to view notes associated with an item, then click the **View Notes** button.
 - If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
 - If you want to view this item in a separate window, then select the check box labeled **Multiple Windows**.
8. If you want to return to the previous search window, then click **Return to Search** tab.

9. If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.
10. If you want to display one item and close the search window, then click **OK**.
11. If you want to exit the Universal Search window at any point during the search, then click **Close**.

3.6 Creating a List

You can create a list in the Universal Search window of the Oracle TeleSales application. Perform a universal search and save the results of the search in the Save Results window. The lists that you save in this window appear in the Saved Results tab of the Universal Search window. The active lists can be placed in the personal list node of the Universal Work Queue by checking the check box in the Save Results window.

You can also create a callback list or a list of contacts you want to export to a spreadsheet. The list is a static snapshot of data at the time the list is created.

Use this procedure to save the results of a search as a list.

Steps

1. Launch the Universal Search window from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.
The Universal Search window appears.
2. From the Find drop-down list, select the type of information you want to search for.
3. In the Universal Search window, perform a quick search or an expanded search.
4. Click **Save Results**.
The Save Results window appears.
5. Enter a list name. The list name must be unique for different lookup types such as organization, party relationship, customer smart search, customer key, lead, opportunity, source code, collateral, and quote.
6. Optionally, enter a description.
7. If you want to activate a list, then select the Active box.
8. If you want to place your saved list on the UWQ, then select the Place on Work Queue box.

9. Click **Save**.

View the list (active, inactive, or all) in the Saved Results tab of the Universal Search window. The created list contains fields for name, status (whether active or inactive), owner of the list, and creation date.

Guidelines

The number of active lists that you can save per type of search, such as opportunity, person, or party relationship is determined by the system profile option *OTS: Number of Active Saved Lists*. You cannot save an active list until your number of active lists is below the threshold value set by this profile. If you exceed the number of active lists specified by the administrator, then inactivate any list that is not currently in use.

The system profile option *OTS: Number of Records Per Saved List* restricts the total number of records per saved list. For example, if this profile option is set to 100, then your list includes the first 100 records of the sorted search results.

3.7 Updating the List Status

You can update the status of a saved list in the Universal Search window. If you want to change the active status or the description for the list, you can do so in the Saved Results tab of the Universal Search window. When you inactivate a list, it is automatically removed from the Universal Work Queue.

This section covers:

- [Section 3.7.1, "Inactivating a List"](#)
- [Section 3.7.2, "Placing a List on the Universal Work Queue"](#)

3.7.1 Inactivating a List

You can inactivate a saved list using the Saved Results tab of the Universal Search window. The number of active lists must be below the value set by the system profile option *OTS: Number of Active Saved Lists*.

Use this procedure to inactivate a list.

Steps

1. Launch the Universal Search window from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.

The Universal Search window appears.

2. From the Find drop-down list, select the type of information you want to search for.
3. In the Universal Search window, click the Saved Results tab.
4. Select the **Active** radio button from the View Status pane.

All the saved active lists appear.

5. Choose the list you want to inactivate.
6. Deselect the status of the saved list to inactive.
7. Optionally, change the description of the saved list.
8. Click **Update**.

View the updated list in the Saved Results tab of the Universal Search window. The inactivated list is automatically removed from the UWQ.

3.7.2 Placing a List on the Universal Work Queue

After you create an active list or update the status of the saved list as active, you can place the personal list on the Universal Work Queue (UWQ). Only those lists that you created for opportunity, person, or party relationship as the search criteria can be placed on the UWQ. For example, if your search criteria is Opportunity and you save the results as an active list, then you can place it on the work queue and this list appears in the UWQ.

Use this procedure to place a saved list on the UWQ.

Steps

1. Launch the Universal Search window from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.

The Universal Search window appears.

2. From the Find drop-down list, select the type of information you want to search for.
3. In the Universal Search window, click the Saved Results tab.
4. Select the **Active** radio button from the View Status pane.

All the saved active lists appear.

5. Choose the active list that you want to place on the work queue.

6. Select the Place on Work Queue box.
7. Click **Update**.

You can view the active list in the UWQ.

3.8 Saving a Query for Reuse

Lists are static. They give you a snapshot in time of your data. If you want to keep track of information that is changing all the time, then you can save your search criteria rather than creating a list. That way you can reuse the same query as often as you want and get the latest information each time. For example, you can refresh a list of your open opportunities and hot leads on a daily basis.

Use this procedure to save queries for reuse in your searches.

Steps

1. Click **Find** in the toolbar. This is the flashlight icon. Alternatively, you can open Universal Search from the Navigator or from a Search button.

The Universal Search window appears.

2. Using the Find drop-down list, select the type of information you are querying.

Note: The query you save is available for use only when you are searching for the same information type.

3. Select the Expanded Search tab.
4. Enter search criteria in any of the fields in the Basic region or in the Advanced region, or both. For each search term in the Advanced region:
 - a. Select the search term using the Item List of Values (LOV).
 - b. Enter an operator using the Condition LOV.
 - c. Enter the value of that condition in the Value field.
5. If you are searching for a party relationship, organization, or person and you want to include inactive records in the search, then select the Include Inactive Records check box.
6. If you are searching for leads, then select My Leads (Sales Team), My Leads (Owner), or All Leads. (Sales team leads are leads where you are a member of

the sales team. Owner leads are leads where the check box Owner is selected for you in the sales team list.)

Note: If the profile option *OS: Lead Access Privilege* is set to Full or Prospecting, then all options are available. If it is set to Sales Team, then you cannot select All Leads.

7. If you are searching for opportunities, then select either My Opportunities (Sales Team) or My Opportunities (Owner).
8. Click **Save Criteria**.
The Save Criteria window displays.
9. Enter a name for the query you are saving. For example: my hot leads.
10. Enter an optional description.
11. Click **Save**.

3.9 Searching Using a Query You Have Saved

Use this procedure to search using a query you have saved.

Steps

1. Navigate to the Universal Search window from the navigator of by clicking **Find** in the toolbar (this is the flashlight icon).
The Universal Search window appears.
2. From the Find drop-down list, select the type of information you want to search for.

Note: Saved queries are listed only when you select the same information type used to create them.

3. Select the Expanded Search tab.
4. Click **Open Criteria**.
The Open Criteria window opens.
5. Select the query you want to use from the list.

6. Click **OK**.

The query criteria are populated in the Universal Search window.

7. Optionally, modify the search criteria.

8. Click **Search**.

The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

9. If you want to view all of the publicly accessible notes associated with an item or create new notes, then click the **View Notes** button in the search results.

10. Select the item in the table and open the relative window in one of the following ways:

- If you want to view this item in a separate window, then select the check box labeled with one of the following Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.
- If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
- If you want to display one item and close the search window, then click **OK**.
- If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

The application displays an item where appropriate. Customer information appears in the eBusiness Center or the At A Glance window, leads in the Lead Center, and opportunities in the Opportunity Center.

3.10 Viewing a List You Have Created

Use this procedure to view a list you have created using the Universal Search window.

Steps

1. Launch Universal Search from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.

The Universal Search window appears.

2. From the Find drop-down list, select the type of list you want to view. Lists are grouped by this information type. For example, to see a list of organizations, you must select Organization.
3. Select the Saved Results tab.

The tab displays the lists you have created in a dynamic table which you can sort by clicking on a column heading.

4. If you want to filter the list by list status, then select **Active** or **Inactive**.
5. If you want to view all lists, select **All**.
6. Select a list you want to view.
7. Click **Open** to view the list.

The tab displays the list in a dynamic table.

8. If you want to view notes associated with an item, then click the **View Notes** button.
9. Select the item in the table and open the relative window in one of the following ways:
 - If you want to view this item in a separate window, then select the check box labeled with one of the following Multiple eBusiness Centers, Multiple Lead Centers, or Multiple Opportunity Centers. Which label you see depends on what information you are searching for.
 - If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
 - If you want to display one item and close the search window, then click **OK**.
 - If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

The application displays an item where appropriate. Customer information appears in the eBusiness Center or At A Glance window, leads in the Lead Center, and opportunities in the Opportunity Center. If you called Universal Search from an application other than Oracle TeleSales, then the application that called for the search displays the information.

Maintaining Customer Information

This chapter describes creating and updating customer information. Sections in this chapter include:

- Section 4.1, "Overview of Customer Information"
- Section 4.2, "Displaying a Consumer in the eBusiness Center Header"
- Section 4.3, "Displaying an Organization in the eBusiness Center Header"
- Section 4.4, "Displaying an Organizational Contact in the eBusiness Center Header"
- Section 4.5, "Viewing All Contacts at an Organization"
- Section 4.6, "Entering a New Contact for an Existing Organization"
- Section 4.7, "Entering a New Contact at a New Organization"
- Section 4.8, "Entering a New Consumer"
- Section 4.9, "Entering a New Organization"
- Section 4.10, "Entering an Address"
- Section 4.11, "Entering Phone, E-mail, and URLs"
- Section 4.12, "Viewing Contact Points and Restrictions for an Address"
- Section 4.13, "Entering Person Details"
- Section 4.14, "Classifying an Organization Using SIC and Other Codes"
- Section 4.15, "Classifying an Organization by Purchase Interests"
- Section 4.16, "Entering Revenue, Fiscal Year, and Other Organization Details"
- Section 4.17, "Entering Details About an Organization's Interests"

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- [Section 4.18, "Specifying a Sales Team"](#)
 - [Section 4.19, "Creating Parties During Another Activity"](#)
 - [Section 4.20, "Viewing Legacy Information"](#)
 - [Section 4.21, "Adding an Account"](#)
 - [Section 4.22, "Adding Sites to an Account"](#)
 - [Section 4.23, "Adding a Party to an Account"](#)
 - [Section 4.24, "Adding Billing Preferences to an Account"](#)
 - [Section 4.25, "Adding Account Relationships"](#)

4.1 Overview of Customer Information

Oracle TeleSales uses Oracle's Trading Community Architecture customer model which stores information about organizations, people, and the relationships between them as separate entities. You must make sure that you select the correct entity when you enter customer information.

This topic explains how the customer model affects the way you enter and view information. It covers:

- [Section 4.1.1, "Customer Model Overview"](#)
- [Section 4.1.2, "How Party Types Affect the Way You View and Enter Customer Information"](#)

4.1.1 Customer Model Overview

The database stores information you enter under three separate entities. These are called parties:

- **Person:** Use this party type to enter personal information for both consumers and contacts at organizations. Personal information includes home address, phone, as well as quotes and orders for purchases an individual makes as a consumer. If your organization sells to consumers, then this is the party type you will be using almost exclusively.
- **Organization:** Use this party type to enter information about the organization you are doing business with. Using this party type you can also view all of the quotes and orders for business purchases made by contacts at this organization.
- **Party relationship:** Use this party type to enter contacts for an organization. If your organization sells primarily to other businesses and organizations, then you will be using this party type most of the time.

Note: If you are entering addresses for a contact at an organization (party of type Party Relationship), then all addresses are automatically copied to the organization as well. Your application administrator can disable this feature by resetting the profile option *OTS: Associate Relationship Location to Organization* to No. Note that only addresses are copied over, not phone numbers, e-mail addresses, and other information.

4.1.2 How Party Types Affect the Way You View and Enter Customer Information

When you enter a contact at an organization using the Party Relationship party type, the application creates all three party types.

Suppose, for example, you enter Jack Jones, the purchasing manager at the ABC Company, as a new customer at a new organization. The application automatically creates three parties:

- **Person:** Jack Jones
- **Organization:** ABC Company
- **Party Relationship:** Jack Jones purchasing manager of the ABC Company

The different party types are designed to hold different types of information.

You must use the person party type to:

- Enter and view Jack Jones's home address and other contact information.
- Enter and view his personal interests.
- Enter and view all purchases he makes as a consumer. If Jack Jones buys a Christmas gift for his daughter Jane, for example, then you must record this sale using the person party type.
- Capture relationships between Jack Jones and other people. Here is where you enter the fact that Jack Jones is the father of Jane Jones.

You must use the organization party type to:

- Enter and view general information about the ABC Company, Jack Jones's employer.
- View quotes and orders for the organization. This includes those placed by Jack Jones in his capacity as employee of the organization.
- Manage leads and opportunities for the ABC Company. This includes any leads and opportunities on which Jack Jones is the contact.
- View all of the other contacts at the ABC Company.
- View all of the quotes and orders for the ABC Company.

You must use the Party Relationship party type to track information relating to Jack Jones's job:

- Enter addresses, phone numbers, and other information for Jack Jones in his capacity as a purchasing manager of ABC Company.

- Capture the relationship between Jack Jones and different organizations. If Jack Jones changes jobs and moves to another organization, this is the party type you use to record his move.

4.2 Displaying a Consumer in the eBusiness Center Header

Use this procedure to search for and display a consumer in the eBusiness Center header.

Navigation

Navigator > eBusiness Center

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Person**.
3. If you want to find the individual by e-mail, then use the Email List of Values (LOV).
4. If you want to find the individual by account number, then use the Account LOV. The account LOV shows all accounts owned by a party of type Person and all parties of type Person that have a role in an account. When a value is selected in the LOV, the role party (Person) is queried in the eBusiness Center. If the selected value is for the account owner, then the party (Person) who owns the account is queried.
5. If you want to find the individual by name, then use the First or Last name LOVs.
6. If you find the individual in the LOV, then click **OK** and the name and basic contact information appears in the eBusiness Center header automatically.
7. If too many results appear for you to examine easily, then click **Cancel** to close the LOV window and perform a complex search for the individual using the Universal Search window instead.

Guidelines

Only active customers can be searched for in the LOV unless the profile option *OTS: Display In-Active Records For Party LOV* is set to Yes.

4.3 Displaying an Organization in the eBusiness Center Header

Use this procedure to search for and display an organization in the eBusiness Center header.

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Organization**.
3. If you want to find the organization by account number, then use the Account LOV. The listed accounts show all accounts owned by a party of type Organization and all parties of type Organization that have a role in an account. When a value is selected in the LOV, the role party (Organization) is queried in the eBusiness Center. If the selected value is for the account owner, then the party (Organization) that owns the account is queried.
4. If you want to find the organization by name, then perform the following steps:
 - a. Place your cursor in the Organization field.
 - b. Enter CTRL+L on your keyboard and use the List of Values (LOV) to search for the name of the organization.
 - c. If you find the organization in the LOV, then click **OK** and the organization information is entered in the eBusiness Center header automatically.
5. If too many results appear in the LOVs, then click **Cancel** to close the LOV window and search for the organization using the Universal Search window instead.

Guidelines

Only active customers can be searched for in the LOV unless the profile option *OTS: Display In-Active Records For Party LOV* is set to Yes.

4.4 Displaying an Organizational Contact in the eBusiness Center Header

Use this procedure to search for and display an organizational contact in the eBusiness Center header.

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Party Relationship**.
3. If you want to find the party by account number, then use the Account LOV. The account LOV shows all accounts owned by a party of type Organization and all parties of type Person that have a role in an account owned by a party of type Organization. Selecting a value in the LOV queries the Organization that owns the account and the Person in the role. If the selected value is for the account owner, only the Organization is queried.
4. If you want to search by name, then perform the following steps:
 - a. Use the Organization List of Values (LOV) to enter the organization.
 - b. Use the Email, First, or Last name LOV to search for and enter the individual. The LOV displays all existing relationships.
5. If too many results appear in the LOVs, then click **Cancel** to close the LOV window and search for the party using the Universal Search window instead.

Guidelines

Only active customers can be searched for in the LOV unless the profile option *OTS: Display In-Active Records For Party LOV* is set to Yes.

4.5 Viewing All Contacts at an Organization

Use this procedure to view all of the contacts at an organization.

Steps

1. If the eBusiness Center is blank or does not display the correct organization, then:
 - a. From the Party Type drop-down list, select **Party Relationship**.
 - b. Use the Organization List of Values (LOV) to select the organization.
 - c. Use the First or Last field LOV to view the list of contacts at the organization.
2. If the eBusiness Center header displays the correct organization and Organization is selected from the Party Type drop-down list, then:
 - a. In the View Details for region, select the name of the organization.

- b. Select the Relationship tab.
 - c. The Object Relationship region displays the contacts for the organization.
 - d. If you want to view or modify the details of any of the contacts, then select one by clicking on the drill-down button to the left of the record you want to view. The drill-down button is the unlabeled button all the way to the left of the record.

The contact opens in the eBusiness Center window.
 - e. If you want to view details about the relationship such as job title, department, and phone number, then double-click the contact type.

The Relationship Details window displays details about the contact.
3. If the eBusiness Center header displays the correct organization and Party Relationship is selected from the Party Type drop-down list, then use the First or Last LOVs to display the list of contacts at the organization.

4.6 Entering a New Contact for an Existing Organization

Use this procedure to enter a new contact at an existing organization.

Prerequisites

Check to see if the contact already exists at the organization to prevent duplicate entries.

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Party Relationship**.
3. Display the organization in the eBusiness Center header.
4. Click **Create**.

The New Party dialog box appears.
5. Click **Person**.

The New Party dialog box closes.
6. Enter the information for the individual.
7. Enter CTRL+S on your keyboard or click **Save** on the toolbar.

8. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application checks for possible duplicate people in the database, and if any are found, the Duplication Prevention: Person window lists all existing people that are similar to your new person according to match rules set up by your administrator. If this window appears, you can do one of the following:
 - a. Click **Use New Person** to create your new record.
 - b. Click **Use Existing Person** to discard your new record without saving it and to view the selected existing person in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.

You are now ready to perform different tasks in the eBusiness Center tabs, including:

- Entering billing, shipping, and other addresses for the contact. Billing and shipping addresses are required if your customer is making a purchase.
- Entering phone numbers and e-mail addresses.
- Entering personal details about the contact in the person tab.

Guidelines

You can enter a duplicate contact. You will receive a warning that it is a duplicate.

If you want to send electronic collateral to this individual, then you must enter the e-mail address under the party type of Person. This is because the collateral tab uses e-mail addresses entered for the party type of Person (the consumer) and not the Party Relationship (organizational contact)

4.7 Entering a New Contact at a New Organization

Use this procedure to enter a new contact at a new organization

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Party Relationship**.
3. Click **Create**.

The New Party dialog box appears.

4. Click **Both**.

The New Party dialog box closes.

5. Use the Organization List of Values (LOV) to check if the organization already exists in the database.

6. Enter the names and other information.

Note: The phone number and e-mail you enter here is tied to the contact and not the organization.

7. Choose a location from the LOV.

8. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

9. Enter address information.

10. Click **OK**.

The window closes and the address appears in the Address field in a concatenated form.

The address you enter here is the primary address for the contact and appears whenever you display the contact in the eBusiness Center header.

Note: By default, the address you enter here for the contact automatically becomes an address for the organization as well. Your application administrator can disable this feature by resetting the profile option *OTS: Associate Relationship Location to Organization* to No.

11. Click **Save** on the toolbar.

12. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application checks for possible duplicate organizations in the database, and if any are found, the Duplication Prevention: Organization window lists all existing organizations that are similar to your new organization according to match rules set up by your administrator. If this window appears, you can do one of the following:

- a. Click **Use New Organization** to create your new record.

- b. Click **Use Existing Organization** to discard your new record without saving it and to view the selected existing organization in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.
13. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application next checks for possible duplicate people in the database, and if any are found, the Duplication Prevention: Person window lists all existing people that are similar to your new person according to match rules set up by your administrator. If this window appears, you can do one of the following:
 - a. Click **Use New Person** to create your new record.
 - b. Click **Use Existing Person** to discard your new record without saving it and to view the selected existing person in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.

You are now ready to perform different tasks in the eBusiness Center tabs. You can:

- Enter details about the contact's organization
- Designate different uses for the address you entered. For example, designate the same address as shipping and billing.
- Enter other addresses, including billing and shipping, for the organization or the contact.

Guidelines

You may want to enter only the contact name and organization in the eBusiness Center header and enter other information, including e-mail, phone, and address, in the eBusiness Center tabs. Use the header to enter only the primary contact information. The tabs allow you to enter multiple addresses, phone numbers, e-mail addresses, and URLs.

You can enter a duplicate contact. You will receive a warning that it is a duplicate.

4.8 Entering a New Consumer

Use this procedure to enter a new consumer.

Prerequisites

Check to make sure the consumer does not already exist in the database to prevent duplicate entries.

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Person**.
3. Click **Create**.
4. Enter the consumer's name and other information.
5. Choose a location from the LOV.
6. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

7. Enter address information.
8. Click **OK**.

The window closes and the address appears in the Address field in a concatenated form. The address you enter here appears whenever this consumer is displayed in the eBusiness Center header.

9. Click **Save** on the toolbar.
10. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application checks for possible duplicate people in the database, and if any are found, the Duplication Prevention: Person window lists all existing people that are similar to your new person according to match rules set up by your administrator. If this window appears, you can do one of the following:
 - a. Click **Use New Person** to create your new record.
 - b. Click **Use Existing Person** to discard your new record without saving it and to view the selected existing person in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.

You are now ready to:

- Enter details about the consumer

- Designate different uses for the address you entered. For example, designate the same address as shipping and billing.
- Enter other addresses, including billing and shipping, for the consumer.

Guidelines

You may want to enter only the consumer name in the eBusiness Center header and enter other information, including e-mail, phone, and address in the eBusiness Center tabs. Use the header to enter only the primary contact information. The tabs allow you to enter multiple addresses, phone numbers, e-mail addresses, and URLs.

If the system profile option *OS: Duplicate Prevention Enabled* is set to No, then you can enter a duplicate person. You will receive a warning that it is a duplicate.

If the system profile option *OS: Duplicate Prevention Enabled* is set to Yes, and either the record exceeds the match threshold or the administrator did not set up match rules, then you cannot save your record unless the system profile option *HZ: Duplicates Allowed* is set to Yes at the User level for you.

4.9 Entering a New Organization

Use this procedure to create a new organization.

Steps

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Organization**.
3. Use the Organization List of Values (LOV) to check if the organization already exists in the database.

Note: To improve performance, your implementation may require you to enter one or more characters of the name you are searching for. In this case, the application displays an error message if you do not enter the required number of characters.

4. Enter the organization name and other information.

Note: The phone number and e-mail you enter here is tied to the organization and does not appear when you are viewing contacts for the organization.

5. Choose a location from the LOV.
6. Click the ellipsis button beside the Address field.
The Address window displays fields in the format for the selected country.
7. Enter address information.
8. Click **OK**.
The window closes and the address appears in the Address field in a concatenated form. The address you enter here is the primary address for the organization and appears whenever you display the organization as party type of Organization.
9. Click **Save** on the toolbar.
10. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application checks for possible duplicate organizations in the database, and if any are found, the Duplication Prevention: Organization window lists all existing organizations that are similar to your new organization according to match rules set up by your administrator. If this window appears, you can do one of the following:
 - a. Click **Use New Organization** to create your new record.
 - b. Click **Use Existing Organization** to discard your new record without saving it and to view the selected existing organization in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.

When your new record successfully saves, you are ready to:

- Enter other phone numbers, e-mail addresses, and URLs for the organization.
- Enter other details about the organization.

Guidelines

Entering an account number for the organization is not recommended.

If the system profile option *OS: Duplicate Prevention Enabled* is set to No, then you can enter a duplicate organization. You will receive a warning that it is a duplicate.

If the system profile option *OS: Duplicate Prevention Enabled* is set to Yes, and either the record exceeds the match threshold or the administrator did not set up match rules, then you cannot save your record unless the system profile option *HZ: Duplicates Allowed* is set to Yes at the User level for you.

4.10 Entering an Address

Use this procedure to enter an address on the Address/Phone tab of the eBusiness Center.

If you are entering a private address, then you must enter it under the party type of Person. If you are entering a business address, then enter it under the party type of Party Relationship or Organization.

A party can have multiple addresses, but only one primary address. The primary address is the one that appears in the eBusiness Center header when you display the party.

Prerequisites

The party for which you want to enter an address must already be in the database.

Display the party in the eBusiness Center header.

Steps

1. Select the correct View Details For that relates to the party's address.

For example, if you are viewing a contact in the header and you want to enter a business address for the contact, then select the person and organization option. If the address is the personal address for the person, then select the person's name. If the address is for the organization, then select the organization name.

2. Select the Address/Phone tab.
3. Choose a country from the LOV.
4. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

5. Enter address information.
6. Click **OK**.

The window closes and the address appears in the Address field in a concatenated form.

7. If the address is the primary address for the party, then select the Primary check box.

Note: You can only have one primary address for a contact, consumer, or organization.

8. Specify the different uses using the Address Usage column. A single address can have multiple uses, such as the shipping and billing address, for example.
 - a. Use the Address Usage field LOV to specify a use for this address.
 - b. To specify additional uses, select a new line and repeat the previous step.
9. If the address is the primary address for that Address Type, then select the Primary check box next to the address type.

You must select this check box only if you have specified more than one address for a specific type. For example, if you specified ten addresses to be the billing addresses for an organization, then you must select one of these as the primary billing address. Designating an address to be primary means that this address is automatically defaulted whenever you enter an address for that type. For example, the billing address designated as primary is the one that will show up by default on a customer invoice.

Note: A primary designation for an address type is not the same as the primary address for a party.

10. Click **Save** on the toolbar.

Guidelines

By default, an address you enter for a contact at an organization (party of type Party Relationship) automatically becomes an address for the organization as well. A primary address you enter does not automatically become a primary address for the organization as well, however. This feature can be turned off by your application administrator by resetting the profile option *OTS: Associate Relationship Location To Organization* to No.

If no style is assigned to a selected country, then all the address fields appear.

To delete the use of an address or an address type, select Inactive. You cannot delete an address because other types of information, including leads and opportunities, may depend on it. But you can either edit the address or effectively remove it from use. Making an address inactive means that it is no longer visible to other users, unless these users specify that they want to view inactive addresses.

Note: The current version of Oracle TeleSales automatically enters today's date as the end date after you select the Inactive check box and vice versa. However, entering a future date as the end date does not automatically make the information inactive after that date.

4.11 Entering Phone, E-mail, and URLs

Use this procedure to enter phone numbers, e-mail addresses, and URLs for an individual consumer, contact, or organization.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. In the View Details For region, select the party you are entering information for. For example, if you are entering a private phone, then select the individual's name. If you are entering a number for a contact at an organization, then select the name of the person and the organization.

Note: Some of the options are unavailable depending on the party and account displayed in the header.

2. Select the Address/Phone tab.
3. In a blank record, use the Contact Method LOV to select the information type that you want to enter.
4. If you are entering a phone number, then:
 - a. Use the Type LOV to select the phone type.
 - b. Enter the phone number in the three Value fields: international code, area code, phone number. Be sure to use a standard format for your entries.

Searches on phone numbers are sensitive to punctuation such as dashes or spaces.

- c. Enter an extension, if any.
- d. Optionally, suggest a time this number can be used by making entries in the Best Time From and Best Time To fields.
- e. If this phone number is the primary phone number which is to appear in the eBusiness Center header, then select the Primary check box.

Note: A party can have only one primary phone number.

5. If you are entering an e-mail address, then:
 - a. Enter the e-mail address in the Value field.
 - b. If this e-mail is the primary email which is to appear in the eBusiness Center header, then select the Primary check box.

Note: A party can have only one primary e-mail address.

6. If you are entering a URL, then:
 - a. Enter the URL in the Value field.
 - b. If this URL is the primary URL which is to appear in the eBusiness Center header, then select the Primary check box.

Note: A party can have only one primary URL.

7. Click **Save** on the toolbar.

4.12 Viewing Contact Points and Restrictions for an Address

Use this procedure to view the contact points for an address and any restrictions placed on that party.

Prerequisites

Display the party in the eBusiness Center header and select the party using one of the View Details For options.

This feature is available in the Address/Phone and Relationship tabs, wherever the contact points button is visible. This button contains a page of an address book with green check marks and a hand with a pen as shown:



Navigation

Navigator > eBusiness Center > Address/Phone

Navigator > eBusiness Center > Relationship

Steps

1. Navigate to the Contact Points window.
2. If you want to view the phone numbers, URLs, e-mails and other contact points for the party you are viewing, then select Contact Points from the drop-down list.

A list of contact methods and best times appears.

3. If you want to view restrictions for the party, then select Restrictions from the drop-down list.

A list of restriction types with date ranges and reasons appears.

4.13 Entering Person Details

Use this procedure to enter details about a person. Details include name pronunciation, educational background, product interests, personal interests, employment history, and military history. The information is stored with the party of type Person.

Prerequisites

Display the consumer or the organizational contact in the eBusiness Center header.

Steps

1. In the View Details For region, select the individual's name.

Note: This option is unavailable if the header displays information for an organization (the party type of Organization).

2. Select the Person tab.
3. Optionally, make entries in the fields provided. If you are entering information for a consumer, then the organization-related fields are disabled.
4. If you want to enter language information, then perform the following steps:
 - a. Click **Person Language**.

The Person Language window opens.
 - b. Select each language from the LOV.
 - c. Use the LOV to designate the language as active or inactive.
 - d. Select Native next to the person's native language.
 - e. Select Primary next to the person's primary language.

The native language appears in the Native Language field on the Person tab.
5. Click **Details**.

The Person Details window appears.
6. If you want to enter the person's product interests, then select the Product Interest tab and perform the following steps for each entry:
 - a. Place your cursor in the Type, Primary, or Secondary fields.
 - b. Click **New**.
 - c. Enter the product interest using the List of Values provided.
 - d. Click **Save** on the toolbar.

Product interest information is saved for the person as a consumer or for the person as a contact, depending upon the View Details For that was selected. It is not saved under both.
7. If you want to enter employment or military history, then select the Job/Military History tab and perform the following steps for each position:

- a. Place your cursor in any of the entry fields.
 - b. Click **New**.
 - c. Enter the job or military history in the fields provided.
 - d. Click **Save** on the toolbar.
8. If you want to enter one or more schools or courses of study, then select the Education tab and perform the following steps for each entry:
- a. Place your cursor in the School field.
 - b. Click **New**.
 - c. Enter the school name and other details about the individual's education in the fields provided.
 - d. Click **Save** on the toolbar.
9. If you want to enter personal interest information, then select the Party Interest tab and perform the following steps for each interest:
- a. Place your cursor in any of the entry fields.
 - b. Click **New**.
 - c. Enter the interests using the fields provided.
 - d. Click **Save** on the toolbar.
10. If you want to classify the person, then Select the Party Classification tab and do the following for each classification:
- a. Click **New**.
 - b. Use the Class Category List of Values (LOV) to enter a classification category. This entry changes the available classifications in the next step.
 - c. Use the Class Code LOV to enter a classification.
 - d. Enter a date in Start Date Active if different from today's date.
 - e. Optionally, enter an end date.
 - f. Optionally, enter a rank. This field is a free-text field.
 - g. If this classification is the primary classification for this individual, then select the Primary flag. You can only select one classification as the primary classification.
 - h. Click **Save** on the toolbar.

Classification information is saved for the person as a consumer or for the person as a contact, depending upon the View Details For that was selected. It is not saved under both.

11. When you are done, select another tab or click **Cancel** to close the Person Details window.

Guidelines

Education, employment history, military history, personal interests, and product interest information is stored with the party of type Person.

When you save, the list is not refreshed automatically, so your entry does not appear in the list until the next time you select the tab or open the window.

The following table gives guidelines for entry or information source for some of the available fields:

Field/Box	Explanation
Last Ordered Date	The date of the last order placed in order management. This field is calculated by the concurrent program <i>Calculate Party Totals</i> .
Lifetime Value	The value of all orders in order management. This field is calculated by the concurrent program <i>Calculate Party Totals</i> .
Alias	A free-text field where you can enter any other names this individual is known by.
Suffix	A free-text field for honorific titles.
Native Language	List of Values (LOV).
Job Title	A free-text field for the individual's job title. Because job titles vary, you may want to classify the job title using the Job Title Type LOV.
Job Title Type	List of Values you can use to classify the job title you entered.
Department	Free-text field for entering the actual department name.
Department Type	Classification of the department name.

4.14 Classifying an Organization Using SIC and Other Codes

Use this procedure to classify an organization according to your organization's classification scheme. You can apply multiple classifications to one organization. For example, you can apply multiple codes from the U.S. government's Standard Industrial Classification (SIC) to capture the whole range of areas where the organization does business.

Prerequisites

Display the organization in the eBusiness Center header.

Steps

1. In the View Details For region, select the organization name.
2. Select the Organization tab.
3. Click **Details**.
The Organization Details window appears.
4. Select the Party Classification tab.
5. For each classification:
 - a. Click **New**.
 - b. Use the Class Category List of Values (LOV) to enter a classification category. This entry changes the available classifications in the next step.
 - c. Use the Class Code LOV to enter a classification.
 - d. Enter a date in Start Date Active if different from today's date.
 - e. Optionally, enter an end date.
 - f. Optionally, enter a rank. This field is a free-text field.
 - g. If this classification is the primary classification for this organization, then select the Primary flag. You can only select one classification as the primary classification.
6. Click **Save** on the toolbar.

4.15 Classifying an Organization by Purchase Interests

Use this procedure to classify an organization according to purchase interest categories. Purchase interest categories are broken up into interest types, primary interests, and secondary interests.

Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

Steps

1. In the View Details For region of the eBusiness Center, select the name of the organization.

Note: This option is unavailable if the header displays information on a consumer (the party type of Person).

2. Select the Organization tab.
3. Click **Details**.
The Organization Details window appears.
4. Select the Site Classification tab.
5. Click **New** to add a new record.
6. Use the interest Type, Primary interest, and Secondary interest Lists of Values (LOV) to classify the organization's interest in your products.
7. Optionally, use the Location LOV to enter an address for the site with those purchase interests.
8. Click **Save** on the toolbar.

4.16 Entering Revenue, Fiscal Year, and Other Organization Details

Use this procedure to enter information about an organization. This includes purchase interests and information on the fiscal year and revenue.

Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

Steps

1. In the View Details For region, select the name of the organization.

Note: This option is unavailable if the header displays information on a consumer (the party type of person).

2. Select the Organization tab.
3. Enter information about the company. See the guidelines section for information on specific fields.
4. Click **Save** on the toolbar.

Guidelines

The following table explains some of the available fields in the Organization Focus region.

Field/Box	Explanation
Alias	A free-text field where you can enter any other names this organization is known by.
Business Line	A free-text field for classifying the organization's line of business.
Customer Category	List of Values used to categorize the organization. This is specified by your implementation team.
Tax ID	Tax identification for the organization.
SIC Code	LOV to enter a Standard Industrial Classification (SIC) code. To enter additional SIC codes and other classifications to capture the whole range of business activities, click the Details button and follow the procedure for Classifying an Organization Using SIC and Other Codes.
DUNS Number	Nine-digit Dun & Bradstreet number for the organization
Projected Revenue	Projected revenue for the organization

Field/Box	Explanation
Rating	This is a read-only field.
Internal radio button	Indicates the organization is an internal customer.
External radio button	Indicates the organization is an external customer.
Inactive	This check box must be unselected. Select this check box only to indicate the organization is no longer a customer or prospect.
Prospect	This read-only check box is selected only if the organization has made a purchase.

4.17 Entering Details About an Organization's Interests

Use this procedure to enter details about an organization's interests. The information you enter here is stored with the party of type Organization.

Prerequisites

Display the organization in the eBusiness Center header.

Steps

1. In the View Details For region, select the organization name.
2. Select Organization tab.
3. Click **Details**.
The Organization Details window appears.
4. Select the Party Interest tab.
5. You can enter multiple interests. For each entry:
 - a. Place your cursor in any of the entry fields in the bottom half of the tab.
 - b. Click **New**.
 - c. Enter the interests using the fields provided.
 - d. Click **Save** on the toolbar.
6. When you are done, select another tab or click **Cancel** to close the Organization Details window.

4.18 Specifying a Sales Team

Use this procedure to select sales team members for a consumer or an organization. In most implementations, sales team members are assigned automatically to a customer by the Oracle Territory Manager module. However, you can use this procedure to override this assignment or assign additional team members of your own.

Prerequisites

You must display the consumer, contact, or an organization in the eBusiness Center header.

Steps

1. In the View Details For region of the eBusiness Center, select the appropriate option.
2. Select the Person tab or the Organization tab.
3. Click **Details**.

The Person Details or Organization Details window appears.

4. Select the Sales Team tab.
5. You can add multiple sales team members and partners to the sales team or a whole sales team:
 - a. If you want to select a partner for the sales team, then, from the Display drop-down list, select Partner. The selection is Employee by default.
 - b. Place your cursor in the Name field. It does not matter if this field is blank or displays a name.
 - c. Click **New**.
 - d. Use the Name List of Values (LOV) to select a sales team member.
 - e. If you want this individual to have view-only access to all opportunities and leads for this customer regardless of whether they are on the opportunity or lead sales team, then use the Role LOVs to select Account Manager.

Note: The role you assign here is different from the group and role you select for reporting purposes.

- f. If you want to keep the new team member on the team regardless of the assignment made by the territory management module, then select the **Keep** check box.
- g. Click **Save** on the toolbar.

Guidelines

If the system profile option *OS: Always Add Creator to Customer Sales Team* is set to Yes, then at the time of customer creation in the eBusiness Center, the user is automatically added to the customer sales team.

4.19 Creating Parties During Another Activity

Use this procedure to create new consumers, organizations, or organizational contacts. This procedure provides an alternate way of creating parties in your database and can be used only in the Collateral, Events, Lead, or Opportunity tabs in the eBusiness Center. Use this method when you need a fast way of entering basic customer information for sending collateral, enrolling customers in events, and creating leads and opportunities.

Prerequisites

You can only access this method of creating new customers while you have the Collateral, Events, Lead, or Opportunity tab selected in the eBusiness Center.

Navigation

Navigator > eBusiness Center > Collateral

Navigator > eBusiness Center > Event

Navigator > eBusiness Center > Lead

Navigator > eBusiness Center > Opportunity

Steps

1. From the Navigate To menu choose **Create Party/Contact**.
The Creation of Party window appears.
2. From the Party Type drop-down list, select the party type you are creating:
 - **Organization:** to create an organization
 - **Person:** to create a consumer.

- **Party Relationship:** to create a contact at an organization.
3. If you are creating a contact at an organization, then the Organization field prefills automatically with the name of the organization displayed in the header.
 4. Enter the individual's name.
 5. If you are creating a contact at an organization, then use the Relation List of Values (LOV) to enter a relationship. Usually this is "Contact".
 6. Enter the person's e-mail address. You need this to send confirmation e-mail and electronic collateral.
 7. Enter other party information.
 8. Click **OK**.
 9. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application checks for possible duplicate organizations in the database, and if any are found, the Duplication Prevention: Organization window lists all existing organizations that are similar to your new organization according to match rules set up by your administrator. If this window appears, you can do one of the following:
 - a. Click **Use New Organization** to create your new record.
 - b. Click **Use Existing Organization** to discard your new record without saving it and to view the selected existing organization in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.
 10. If the system profile option *HZ: Enable Duplicate Prevention at Party Creation* is set to Yes, then the application next checks for possible duplicate people in the database, and if any are found, the Duplication Prevention: Person window lists all existing people that are similar to your new person according to match rules set up by your administrator. If this window appears, you can do one of the following:
 - a. Click **Use New Person** to create your new record.
 - b. Click **Use Existing Person** to discard your new record without saving it and to view the selected existing person in the eBusiness Center.
 - c. Click **Cancel** to return to your entered information without saving so that you can modify it.

4.20 Viewing Legacy Information

You can drill down to a customer record in your legacy system directly from the eBusiness Center by double-clicking the External Reference Number on the Organization tab, Person tab, or Relationship tab. A browser window opens and displays the related customer record.

To set up this feature, set one or more of the following profile options at the site level:

- OS: Organization Original System Reference URL
- OS: Person Original System Reference URL
- OS: Relationship Original System Reference URL

4.21 Adding an Account

Use this procedure to add a new account from the eBusiness Center.

Prerequisites

You must display the party in the eBusiness Center header.

Steps

1. In the View Details For region, you must select a person name, organization name, or account number.

2. Select the Account tab.

The Account tab displays a list of existing accounts for the selected View Details For.

3. Click New.

The displayed account detail information is cleared and ready for data entry.

4. Enter a name for the account.
5. Select an account status, such as active.
6. Enter the other optional fields.
7. Click **Save** on the toolbar to save the record.

8. If you want to add additional account information, then click **Details**.

The Account Details window appears.

9. If you want to enter billing preferences, then click the Billing Preferences tab and enter the information.
10. If you want to enter an address for the account, then click the Sites tab and enter the information. You can add more than one address. Addresses must already exist for the party.
11. If you want to add roles to the account, then click the Roles tab and perform the following steps:
 - a. Select the party.
 - b. Select the role type.
 - c. Select the status for the role, such as active.
 - d. Select the appropriate address for the party from the LOV. (The address cannot be updated after the record is saved.) The address must already be added to the site in step 10 to appear in the LOV.
 - e. Optionally add the same party and role again with another address and repeat for any number of addresses.
 - f. Optionally add other parties and roles.
12. If you want to relate the new account to another account, then click the Relationships tab and select the account.
13. Save the detail information.

4.22 Adding Sites to an Account

Use this procedure to add sites to an account.

Prerequisites

You must display the party in the eBusiness Center header.

Addresses must be added for the party in the eBusiness Center.

Steps

1. In the View Details For region, you must select a person name, organization name, or account number.
2. Select the Account tab.

The tab displays the accounts in a dynamic table.

3. Select the account in the table.
4. Click **Details**.
The Customer Account Details window appears showing the various aspects of the account.
5. Select the Sites tab.
A list of current site addresses appears.
6. Click **New**.
The read-only fields clear and are available for data entry.
7. Use the LOV to select one of the party sites.
8. Use the LOV to select the correct site use.
9. Select **Active** if the site is active for the account.
10. Select **Primary** if this is the primary site for the account.
11. Save your work.

4.23 Adding a Party to an Account

You can assign a role to a party for an account. You can assign multiple addresses to a role.

Prerequisites

The party must first have a relationship to the account owner.

The account owner information is open in the eBusiness header.

The address must be added as a site for the account.

Steps

1. Select the Account tab.
The tab displays the accounts in a dynamic table.
2. Select the account in the table.
3. Click **Details**.
The Customer Account Details window appears showing the various aspects of the account.

4. Select the Roles tab.
A list of currently assigned roles appears.
5. Click **New**.
The read-only fields clear and are available for data entry.
6. Select a party name from the LOV.
7. Select the role type the party plays for the account.
8. For Role Status, select active, inactive, or deleted.
9. Enter effective dates for the role on the account.
10. If this is the primary role for the account, then select **Primary Role**.
11. Select the appropriate address for the party. (The address cannot be updated after the record is saved.)
12. Save your work.

Guidelines

A party can be given more than one role. A party with any given role can have more than one address. Add the party again, assign it the same role, and select another address.

4.24 Adding Billing Preferences to an Account

Use this procedure to add billing preferences to an account.

Prerequisites

You must display the party in the eBusiness Center header.

Steps

1. In the View Details For region, you must select a person name, organization name, or account number.
2. Select the Account tab.
The tab displays the accounts in a dynamic table.
3. Select the account in the table.
4. Click **Details**.

The Customer Account Details window appears showing the various aspects of the account.

5. Select the Billing Preferences tab.

A list of current billing preferences appears.

6. Click **New**.

The read-only fields clear and are available for data entry.

7. Enter the appropriate information.
8. Save your work.

4.25 Adding Account Relationships

Use this procedure to add relationships between the displayed account and other accounts.

Prerequisites

You must display the party in the eBusiness Center header.

Steps

1. In the View Details For region, you must select a person name, organization name, or account number.

2. Select the Account tab.

The tab displays the accounts in a dynamic table.

3. Select the account in the table.

4. Click **Details**.

The Customer Account Details window appears showing the various aspects of the account.

5. Select the Relationships tab.

A list of current account relationships appears.

6. Click **New**.

The read-only fields clear and are available for data entry.

7. Use either the Related Account Name or Related Account Number LOV to find the account.

8. In Relationship Type, choose whether the account is in a parent/subsidiary relationship, a reciprocal relationship, or all.
9. Select the status for the account relationship, such as Active.
10. Select **Primary** if this is the primary site for the account.
11. Select **Reciprocal** if you want to save the relationship for the related account as well as for the current account.

For example:

Add a relationship for account A with account B and select reciprocal. Account B now has a relationship with account A

Add a relationship for account X with account Y and do not select reciprocal. Account Y does not have a relationship with account X.

12. Save your work.

Recording Relationships

This chapter describes how to record relationships. Sections in this chapter include:

- [Section 5.1, "Overview of Relationships"](#)
- [Section 5.2, "Capturing a Relationship Between Two Organizations"](#)
- [Section 5.3, "Capturing a Relationship Between Two People"](#)
- [Section 5.4, "Capturing a Relationship Between a Person and an Organization"](#)
- [Section 5.5, "Ending a Relationship Between a Person and an Organization"](#)

5.1 Overview of Relationships

You can use the Relationship tab of the eBusiness Center to capture both business and personal relationships between any parties in the database and between outside parties and your internal organizations.

5.1.1 Types of Relationships You Can Capture

You can capture:

- Business relationships between two individuals, such as "is the manager of." You can establish these types of relationships for business contacts (parties of type Party Relationship).
- Personal relationships between two individuals, such as "is the father of," and "is the son of." You can establish these relationships for consumers and business contacts (parties of type Person and Party Relationship).
- Relationships between individuals and organizations, such as "is an employee of," or "purchasing manager for." You can establish these relationships for business contacts (party of type Party Relationship).
- Relationships between different organizations, such as "is a subsidiary of." You can establish these relationships for organizations (party of type Organization).
- Relationships between outside organizations and your own internal organizations. For example, you can track the actions of your competitors by setting up the relationship "is the competitor of" between outside organizations and your own internal organizations.

There is no limit to the number of relationships or the combination of relationships you can capture for any one person or organization.

You can make a relationship inactive, for example, when the contact is on an extended vacation. Or you can terminate a relationship by entering an end date, for example, when an individual moves to another company.

5.1.2 How You Capture a Relationship

You capture a relationship between two parties by displaying one of the parties in the eBusiness Center and entering the relationship to another party on the Relationship tab.

If you want to capture relationships your organization has with other organizations such as competitors or suppliers, then you must enter your organization into the

database as you would a customer. The only difference is that you flag your organization as internal by selecting the Internal check box on the Organization tab.

5.1.3 Reciprocal Relationships are Captured Automatically

Most relationships, such as "is the father of" or "is a subsidiary of" describe the relationship in only one direction. To capture a relationship between two entities fully, you must also specify the reciprocal relationship.

For example, if you specify that John is the father of Mary, then you want Mary's record to reflect the fact that she is the daughter of John. If you specify that ABC Company is the subsidiary of XYZ Corporation, then you want the XYZ Corporation record to reflect the fact that it is the parent company of ABC Company.

Oracle TeleSales supplies the reciprocal relationships for you automatically. You only need to enter one of the relationships.

5.2 Capturing a Relationship Between Two Organizations

Use this procedure to establish and create a relationship between two organizations. For example, to capture the fact that one company has been acquired by another.

Prerequisites

You must display one of the organizations or display a contact at one of the organizations in the eBusiness Center header.

You must have update access to both organizations.

Steps

1. In the View Details For region, select the name of one of the two organizations.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship of the organization to the second organization.
4. From the Object Type drop-down list, select Organization.
5. Choose the second organization from the Object Name List of Values.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.

8. Click **Save** on the toolbar.

5.3 Capturing a Relationship Between Two People

Use this procedure to capture a relationship between two people, for example, to capture the fact two people are married or that one is the boss of another.

Prerequisites

You must display one of the consumers or display one of the two organizational contacts in the eBusiness Center header.

You must have one of the following:

- Update access to both people
- View access to both people, the profile option *OS: Create Contact Privilege* is set to Yes, and you are not an Administrator

Steps

1. In the View Details For region, select the name of the person.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship that person has to the second person. For example, "is the manager of," "is the spouse of," or "is the father of."
4. From the Object Type drop-down list, select **Person**.
5. Use the Object Name List of Values to enter the second person. The LOV displays all parties available to create a relationship with.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

5.4 Capturing a Relationship Between a Person and an Organization

Use this procedure to capture the relationship between a contact and an organization, for example, when a contact moves from one organization to another. A contact can have relationships with many organizations.

Prerequisites

You must display a consumer or display a contact at an organization in the eBusiness Center header.

You must have one of the following:

- Update access to the organization
- View access to the organization, the profile option *OS: Create Contact Privilege* is set to Yes, and you are not an Administrator
- Update access to the person, the profile option *OS: Create Contact Privilege* is set to Yes, and you are not an Administrator

Steps

1. In the View Details For region, select the person's name.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship of the person to the organization.
4. From the Object Type drop-down list, select **Organization**.
5. Use the Object Name List of Values to enter the organization.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

5.5 Ending a Relationship Between a Person and an Organization

Use this procedure to indicate a person is no longer associated with an organization, for example, when the person moves to a job at another organization.

Prerequisites

You must display the contact in the eBusiness Center header.

Steps

1. In the View Details For region, select the name of the organization.
2. Select the Relationship tab.
3. Select the relationship you want to terminate.

4. Select the **Inactive** check box.
5. If you know the relationship has ended permanently, then enter a date in the **End Date** field.
6. Click **Save** on the toolbar.

Working with Leads

This chapter discusses working with leads. Sections in this chapter include:

- Section 6.1, "Overview of Working with Leads"
- Section 6.2, "Creating a Lead in the eBusiness Center"
- Section 6.3, "Displaying a Lead in the eBusiness Center"
- Section 6.4, "Displaying a Lead in the Lead Center"
- Section 6.5, "Creating a Lead in the Lead Center"
- Section 6.6, "Entering Interests, Contacts, and Other Details in the Lead Center"
- Section 6.7, "Accepting a Lead Assigned to You"
- Section 6.8, "Refusing a Lead Assigned to You"
- Section 6.9, "Assigning a Lead to Someone Else"
- Section 6.10, "Selecting Individuals and Sales Groups for a Lead Sales Team"
- Section 6.11, "Viewing Opportunities Created from a Lead"
- Section 6.12, "Qualifying a Lead"
- Section 6.13, "Working With Leads in the Universal Work Queue"
- Section 6.14, "Turning a Lead into an Opportunity"

6.1 Overview of Working with Leads

Leads are designed to capture the initial contacts with potential customers, gathering just enough information to tell a sales organization if a lead merits more sales resources, should be set aside for a later date, or should be abandoned entirely.

Agents use leads to gather information on:

- The products a customer is interested in purchasing
- The budget
- Names of contacts associated with the lead
- The time frame for the sale
- Tasks relating to the lead
- Notes

The person creating a lead can assign it manually to a sales agent who becomes the lead owner and can specify other agents to be on the sales team for the lead. Or the agent can let the Oracle Territory Manager module automatically assign an owner and a sales team to the lead.

6.1.1 Lead Routing

Depending on the implementation, Oracle TeleSales can automatically assign leads to individual agents who become the lead owners and to whole sales teams. When individual agents create leads, they automatically become the lead owners and have the option of assigning the leads manually. Depending on the implementation, the assigned lead shows up on the work queue of the owner of the lead or the whole sales team. The agent can accept or refuse the lead assignment by displaying the lead in the Lead Center and clicking either the Accept or the Decline buttons.

6.1.2 Lead Status and Qualification

The progress of a lead is tracked by its qualification flag and status.

The status of a lead and lead qualification provide independent ways of tracking the progress of a lead. A lead must become qualified before it can be turned into an opportunity.

The agent must evaluate the likelihood of a particular lead turning into a sale and assign it a rank.

6.1.3 Lead Rank

Lead rank tracks the desirability of the lead. Agents can select a value manually from the Lead Rank drop-down list or they can let the application assign the rank automatically by clicking the Rank button.

The application determines the quality of the lead by using the rules engines set up by the application implementer or administrator.

If the system profile option *OS: Auto Run Lead Engine While Update* is set to Yes, then the Lead Engine is run every time you change information in the lead. If it is set to No, then if you want to see how the changes affect the lead quality, channel, or resource you can manually run the engine by choosing *Run Lead Engine* from the Actions menu.

6.1.4 Assigning Leads To Sales Representatives

Lead creators can either allow the territory assignment program to assign the leads to sales representatives automatically or choose the sales representatives manually. The sales representatives then turn the leads into new opportunities or link them to existing opportunities.

6.2 Creating a Lead in the eBusiness Center

Use this procedure to create a lead for an organization or a consumer.

Prerequisites

Display the party in the eBusiness Center header.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > eBusiness Center

Steps

1. In the View Details For region, select the person, organization, or contact for the lead.

Note: When you create a lead for an organizational contact the lead is recorded for the organization and the contact is listed as the primary contact for the lead.

2. Select the Lead tab.
3. Click **New**.
4. Enter a name for the lead in the Lead Name text field.
5. Enter a name for the project. The name you enter in this free-text field is also used as the name for the opportunity you create from this lead.
6. Optionally, use the Primary Contact LOV to enter the individual who will be the primary contact for this lead. For consumers, this field defaults to the name of the consumer.
7. If an organization has many locations, then enter a location for the lead.
8. If you entered a primary contact, then select a role for the contact using the Contact Role LOV.
9. If you entered the source code for the customer in the Overview tab, then the Source Code is prefilled. If you did not make the entry, then enter it now using the List of Values (LOV). If you do not know the source code name, then save your work and search for the source code using Universal Search.
10. If you entered the offer in the Overview tab, then the Offer Code is prefilled. If you did not make the entry, then enter the offer now using the LOV.
11. Specify the sales channel. By default, this can be either direct or indirect.
12. Enter an approximate budget for the lead and the currency code.
13. Enter the budget status.
14. Use the Time Frame LOV to enter a time frame in which you expect the lead to close.
15. Use the Lead Rank field to evaluate the desirability of the lead. If you leave the Lead Rank field blank, then the application ranks the lead based on the information you have entered. The ranking takes place after you save the lead.

16. If you want to leave the territory management program to automatically assign the lead to a member of the sales team, then leave the Lead Owner field blank. Make an entry only if you want to override the territory assignment program and assign this lead to an agent manually.
17. If the lead is qualified, then select the Qualified check box.
If you do not select the Qualified check box, the application checks to see if the lead is qualified using the Qualification Engine.
18. Optionally, enter lead purchase interests, including the quantity the customer wants to purchase and the purchase amount.
19. Click **Save** on the toolbar.
20. If you want to add other lead information, click **Details** to launch the Lead Center.

Guidelines

The status of the lead is New by default. You can choose to override the default designation by selecting a status of your own.

A close reason is required only if you change the status of a lead to a status with a Closed flag.

Note: In some implementations, it is possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This can result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab in the Lead Center to override territory assignment and prevent this from happening.

You cannot create a lead for an account.

6.3 Displaying a Lead in the eBusiness Center

Use this procedure to display a lead for an organization or a consumer in the eBusiness Center.

In this procedure you find your lead in a list of leads displayed in the Leads tab of the eBusiness Center. If you have a large number of leads to sort through or need to

search on leads using specific criteria, then search for a lead using the Universal Search Window.

Prerequisites

Display the party in the eBusiness Center header.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > eBusiness Center

Steps

1. If you want to view leads for a consumer, then, in the View Details For region, select the person's name.
2. If you want to view leads for an organization, then select the name of the organization.
3. If you want to view leads for an organization where the displayed contact is a contact for the leads, then select the name of the organization and the contact name.
4. Select the Lead tab.
The leads for this person or organization, if any, appear.
5. If you want to view only open leads, then make sure the Display All check box is not selected.
6. If you want to view only leads where you are the owner, then select the Owner check box.
7. You can sort the leads in the table by any of the available fields by clicking the field header.
8. Select the lead you want to view or modify from the list. The basic information about the lead appears in the tab.
9. If you want to view more details about the lead, then click **Details** to launch the Lead Center. If you want to open the details in a new window rather than using

an existing Lead Center window, then select the **Multiple Details** check box before clicking **Details**.

6.4 Displaying a Lead in the Lead Center

You can display a lead in the Lead Center in a number of ways. These include:

- Search for the lead using the Universal Search window
- Display the lead in the eBusiness Center first and then click **Details** to open the Lead Center.
- Double-click a lead listed in the Universal Work Queue.
- Navigate to the lead from the opportunity summary in the Dashboard tab of the eBusiness Center.

6.5 Creating a Lead in the Lead Center

Use this procedure to create a lead for an organization or a consumer in the Lead Center.

Prerequisites

None

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Steps

1. Navigate to the Lead Center
2. Click **New**.
3. From the Party Type drop-down list choose either **Organization** or **Person** (consumer).

4. Use the Customer field List of Values to enter the organization or consumer name.
5. Optionally, use the Primary Contact List of Values (LOV) to enter the individual who will be the primary contact for this lead. For consumers, this field defaults to the name of the consumer.
6. Optionally, enter a unique name in the Lead Name text field.
7. Enter a name for the project. The name you enter in this free-text field is also used as the project name for any opportunity you create from this lead.
8. Optionally, enter the address for the project using the Location LOV.
9. The status of the lead is new by default. You can choose to override the default designation by selecting a status of your own.
10. Optionally, enter a source name this lead is related to using the Source Name LOV.
11. Optionally, choose a campaign offer and response channel.
12. Specify the sales channel. By default, this can be either direct or indirect.
13. Optionally, enter a currency amount in the Budget field and select a budget status using the Budget Status LOV.
14. Optionally, use the Time Frame LOV to select a time frame for closing the deal.
15. Use the Lead Rank field to evaluate the desirability of the lead. If you leave the Lead Rank field blank, then the application ranks the lead based on the information you have entered. The ranking takes place after you save the lead.
16. A lead can become qualified automatically using the Qualification Engine. If you want to qualify a lead manually, then select the **Qualified** box.
17. A close reason is required only if you change the status of a lead to closed.
18. If you want to assign this lead to someone in your sales team, then use the Lead Owner LOV to enter the name of the individual. The person becomes the owner of the lead and receives notification in the work queue of this assignment.
19. Click **Save** on the toolbar.

You are now ready to:

- Enter purchase interests on the Purchase Interest tab
- Enter notes on the lead on the Notes tab
- Select individuals and sales groups for the lead sales team

6.6 Entering Interests, Contacts, and Other Details in the Lead Center

Use this procedure to enter a prospect's purchase interests and other details into an existing lead using the Lead Center.

Prerequisites

You must create the lead and display it in the Lead Center.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Steps

1. Navigate to the Lead Center.
2. On the Purchase Interest tab, use the Lists of Values (LOVs) to enter the customer's product interest using interest categories set up by the application implementation team.
3. In the Contact tab, enter the contacts for the lead using the First Name LOV. The contacts must already be entered in the database before you can add them here.

Note: If you are creating the lead for a contact at an organization, then that contact is automatically made the primary contact for the lead.

4. You can designate one contact as the primary contact by selecting the Primary check box.
5. If you want to assign tasks for this lead to others in your organization, then select the Task tab and enter task information. See [Chapter 14, "Using Tasks"](#) for more information.
6. Optionally, enter partner information on the Partner tab.

7. Save your changes.
8. If the system profile option *OS: Auto Run Lead Engine While Update* is set to Yes, then the Lead Engine is run every time you change information in the lead. If it is set to No, then if you want to see how the changes affect the lead quality, channel, or resource you can manually run the engine by choosing **Run Lead Engine** from the Actions menu.

6.7 Accepting a Lead Assigned to You

Use this procedure to accept a lead assigned to you. When a lead is assigned to you, it automatically appears in your Universal Work Queue.

Prerequisites

None

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Steps

1. Display the lead in the Lead Center. You can do so by double-clicking the lead name in the Universal Work Queue.
The lead appears in the Lead Center window.
2. Select the Accepted check box.
3. Click **Save** on the toolbar.

6.8 Refusing a Lead Assigned to You

Use this procedure to refuse a lead that has been assigned to you in error.

Prerequisites

None

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Steps

1. Display the lead in the Lead Center by double-clicking the lead name in your Universal Work Queue.

The lead appears in the Lead Center window.

2. Click **Decline**.

The Decline Reason window appears.

3. Use the Decline Reason List of Values to select the reason.

4. Click **OK**.

Guidelines

If the owner of a lead declines the lead, then the owner is removed from the sales team unless Keep is selected for the owner in the Sales Team tab.

6.9 Assigning a Lead to Someone Else

Use this procedure to assign a lead to someone else.

Prerequisites

Display the lead in the Lead Center

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Steps

1. If you want to leave the territory management program to automatically assign the lead to a member of the sales team, then delete any name from the Lead Owner field.
2. If you want to override the territory assignment program and assign this lead to an agent manually, then use the Lead Owner field List of Values to enter an agent's name.
3. Click **Save**.

6.10 Selecting Individuals and Sales Groups for a Lead Sales Team

Use this procedure to manually add sales agents and partners to a lead sales team. You can add individuals or entire sales groups to your team with this procedure.

Adding someone to the sales team makes them able to view the lead and add notes and tasks. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the lead.

If your organization has implemented Oracle Territory Management, then a sales team is assigned to the lead automatically. However you can use this procedure to override any automatic assignment by selecting the Keep check box.

Prerequisites

Display the lead in the Lead Center

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Steps

1. Select the Sales Team tab.

The tab lists the current sales team.

If your organization has set up the Oracle territory Management module, then the sales team is automatically assigned to the lead when you create it.

2. If you want to add the team members of an entire sales group, then:

- a. Click **Add Resource Team**.

The Add Resource Team window appears.

- b. Search for the sales team you want to add by entering its name or partial name in the Team Name and clicking **Find**. Use the % sign to substitute for any missing characters.

The sales teams that match your search criteria appear in the Team Name column.

- c. Select the sales team you want to add by placing your cursor anywhere in the record.
- d. The names of the individuals on the sales team appear.
- e. If you want to provide the new team members with rights to modify lead information, then select the Provide Full Access check box.
- f. Click **OK**.

The sales group sales team is added to the lead sales team. Each individual has the Keep check box selected. This means that their assignment cannot be overridden by the Territory Manager module.

3. If you want to add an individual sales team member, then in the Sales Team tab:

- a. Use the Name List of Values to add the agent.
 - b. If you want this individual to have update privileges for this lead, then select the Full check box. All team members have view privileges.
 - c. If you want to keep this individual regardless of the assignment made by the CRM Territory Management module, then make sure the Keep check box is selected.
 - d. Click **Save** on the toolbar when you have completed adding agents.
4. If the system profile option *OS: Auto Run Lead Engine While Update* is set to Yes, then the Lead Engine is run every time you change information in the lead. If it is set to No, then if you want to see how the changes affect the lead quality, channel, or resource you can manually run the engine by choosing **Run Lead Engine** from the Actions menu.

Guidelines

Note: In some implementations, it is possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This can result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab to override territory assignment and prevent this from happening.

6.11 Viewing Opportunities Created from a Lead

Use this procedure to view in the Lead Center opportunities that have been created from a lead.

Prerequisites

Display the lead in the Lead Center.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Steps

1. Select the Opportunity tab.
Any opportunities created from the lead are listed.
2. If you want to view an opportunity, then select the opportunity from the list and click **Details**.
The Opportunity Center displays the details of the opportunity.

6.12 Qualifying a Lead

Use this procedure to qualify a lead. A lead must be qualified before it can be turned into an opportunity.

Prerequisites

Display the lead you want to qualify in the Lead tab of the eBusiness Center or in the Lead Center.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > eBusiness Center > Lead

Steps

1. A lead can become qualified automatically using the Qualification Engine.
2. If you want to qualify a lead manually, then select the **Qualified** box.
3. Click **Save** on the toolbar.

6.13 Working With Leads in the Universal Work Queue

The Universal Work Queue displays a list of leads for quick navigation and update. There are two Universal Work Queue windows available, one with the queue listed on one side of the window, and the other with the choices in a cascading menu.

Prerequisites

The leads must exist.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Universal Work Queue

Steps

1. In the Select Items list or the UWQ nodes, highlight either My Leads (Owner) or My Leads (Sales Team). Optionally, you can select your choice and skip steps 2 and 3.

The next selection list appears.

2. Select one of the following options:
 - 30 Days: Open leads updated in the last 30 days
 - 90 Days
 - 6 Months
 - 1 Year
 - All: All open leads

The next selection list appears.

3. Optionally, select a lead status.

The window displays a list of leads that match the selected criteria and displays related note history for any selected lead.

4. If you want to update a lead, then perform the following steps:

- a. Select the lead and select your choice from the Action drop down list. If you select more than one lead, then some actions are not available.
- b. Enter or select your changes.
- c. Optionally, enter a note.
- d. Click **Apply**.

Your changes are saved for one or more selected leads.

5. Optionally, double-click anywhere in a row to open the lead in the Lead Center.

Guidelines

The Update Lead region can be customized by your administrator, including adding actions to the Action drop down list.

6.14 Turning a Lead into an Opportunity

An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order. Use this procedure to turn a lead into an opportunity.

Prerequisites

- Display the lead in the Lead Center or on the Lead tab of the eBusiness Center.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Navigator > eBusiness Center > Lead

Steps

1. If the lead does not have a description, enter it now in the Lead Name field. A lead name is required for opportunity creation.

2. Click **Create Opportunity**.
3. The application checks the lead information you have entered in the lead against information in all existing opportunities to see if a similar opportunity already exists.
4. If a potentially duplicate opportunity exists, then the Lead Linking window appears. Check for duplicate opportunities to see if you must create a new opportunity or link any items to an existing one.

Guidelines

When a lead is converted to an opportunity, then the lead status becomes read only if the system profile option *OS: Lead New State Transition* is set to Yes.

Tracking Opportunities

This chapter discusses tracking opportunities. Sections in this chapter include:

- Section 7.1, "Overview of Tracking Opportunities"
- Section 7.2, "Displaying an Opportunity in the eBusiness Center"
- Section 7.3, "Turning a Lead into an Opportunity"
- Section 7.4, "Checking for Duplicates When Creating Opportunity from a Lead"
- Section 7.5, "Creating an Opportunity Without a Prior Lead in the eBusiness Center"
- Section 7.6, "Linking an Opportunity to Leads"
- Section 7.7, "Displaying an Opportunity in the Opportunity Center"
- Section 7.8, "Creating an Opportunity in the Opportunity Center"
- Section 7.9, "Entering Purchase Interests"
- Section 7.10, "Entering Opportunity Contacts"
- Section 7.11, "Classifying an Opportunity"
- Section 7.12, "Tracking Obstacles to an Opportunity"
- Section 7.13, "Tracking Competition for an Opportunity"
- Section 7.14, "Selecting Individuals and Sales Groups for the Opportunity Sales Team"
- Section 7.15, "Viewing Partner Selection Criteria and Routing History for an Opportunity"
- Section 7.16, "Routing an Opportunity to a Partner"
- Section 7.17, "Viewing Leads Associated with an Opportunity"

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- [Section 7.18, "Freezing an Opportunity"](#)
 - [Section 7.19, "Splitting Up an Opportunity If Only Some Items Can Close"](#)
 - [Section 7.20, "Deleting Purchase Items from an Opportunity"](#)
 - [Section 7.21, "Copying an Opportunity"](#)
 - [Section 7.22, "Updating Opportunities"](#)
 - [Section 7.23, "Performing a Mass Update of Opportunities"](#)
 - [Section 7.24, "Updating Your Pipeline"](#)
 - [Section 7.25, "Working With Opportunities in the Universal Work Queue"](#)
 - [Section 7.26, "Splitting Up a Purchase Line for Inclusion in Multiple Forecasts"](#)
 - [Section 7.27, "Using Personal Opportunities Lists"](#)
 - [Section 7.28, "Entering Sales Credit for Purchases in an Opportunity"](#)
 - [Section 7.29, "Viewing Sales Credit Totals for an Opportunity"](#)
 - [Section 7.30, "Closing an Opportunity So You Can Receive Sales Credit"](#)
 - [Section 7.31, "Viewing the History of an Opportunity"](#)

7.1 Overview of Tracking Opportunities

Use an opportunity to enter and track:

- **Progress of Your Sale**
- **Purchase Interests:** Enter the product category the customer is interested in buying and the projected amounts.
- **Sales Team:** Add individual sales team members or entire sales groups to form a team or let the territory management module assign a team.
- **Sales Methodology:** Select a sales methodology. A sales methodology has sales stages, each stage containing defined tasks. The System administrator sets up the sales methodology.
- **Sales Credit:** The sales credit the sales team members are to receive.
- **Contacts:** Contacts for the opportunity.
- **Obstacles:** Enter information about your competitors.
- **Closing Information.** Track orders placed for won opportunities as well as information about competitors for lost opportunities. If an opportunity results in a sale, you must remember to enter closing information for an opportunity so the sales team can receive sales credit for their work. This is available from the menu.
- **Classification:** Classify an opportunity according to categories defined by your implementation team. The values you enter here can be used to assign this opportunity to the appropriate sales team.
- **Tasks:** View and assign tasks relating to the opportunity. The tasks appear in the work queue of the individual you assign them to.
- **Leads:** View the leads linked to the opportunity.
- **Quotes and Orders:** View the quotes and orders resulting from the opportunity or launch the Quoting window to create new quotes and orders.
- **Forecasts:** The sales credits for each purchase interest are added up as your sales forecast.
- **Partners:** Enter criteria the channel manager in Oracle Partners Online will use to select a partner, or, when authorized, route the opportunity to a partner yourself.

7.1.1 How You Create an Opportunity

There are two ways you can create an opportunity. You can:

- Create an opportunity from a qualified lead
- Create an opportunity directly without a qualified lead

Creating an Opportunity from a Qualified Lead

When a sales representative attempts to create an opportunity from a lead, Oracle TeleSales automatically performs a check for potential duplicate opportunities.

If the application finds a potential duplicate, the sales representative can:

- Link the lead to the existing opportunity.

Note: Agents can link a lead to existing opportunities even if they do not have access to those opportunities.

Purchase and other information is not transferred to the matching opportunity, but agents can access the lead from the Lead tab of the linked opportunity.

- Copy purchase line items to the duplicate opportunity.

The copied items are transferred to the potential purchases in the existing opportunity. The copy process removes them from the lead.

The sales representative creating the new opportunity becomes the leader of the opportunity team. Any team member required to make modifications to opportunity information must be designated as having *Full Access*. This is done by selecting the Full check box.

The application automatically notifies new team members of the assignment via their work queues.

The team members use the opportunity to record information on the negotiations, to prepare forecasts, and to assign sales credit.

A team leader can decide to create a quote for a customer at any time. Quotes can be configured for all of the purchase items.

Creating a New Opportunity Directly

You can create new opportunities without a prior lead in the eBusiness Center or the Opportunity Center. The Opportunity tab of the eBusiness Center provides you

with a way to quickly enter basic opportunity information. Use the Opportunity Center to fill in the details.

7.1.2 Sales Credit

Depending upon your implementation, sales team members can be assigned automatically to a customer by the Oracle Territory Management module, and additional members or groups can be added manually. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the opportunity. If you have Oracle Partners Online, you can also have an outside sales partner work on an opportunity.

Assign sales agents and partners both revenue and non-revenue sales credits for individual purchases in an opportunity. To receive sales credit and to assure accurate pipeline reports, you must close an opportunity and enter a close reason after placing an order for a customer.

7.2 Displaying an Opportunity in the eBusiness Center

Use this procedure to display opportunities for a consumer or an organization.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you want to view opportunities for a consumer, then, in the View Details For list, select the person's name.
2. If you want to view opportunities for an organization, then select the name of the organization.
3. If you want to view opportunities for an organization where the displayed contact is a contact for the opportunities, then, in the View Details For list, select the name of the organization and the contact name.
4. If you want to view opportunities for an account, then, in the View Details For list, select the account number.
5. Select the Opportunity tab.

The opportunities that have been created for your selected View Details For are listed.

6. If you want the list to display only opportunities you receive sales credit for, then select the Sales Credits check box.
7. If you want to view only open opportunities, then deselect the Display All check box.
8. You can sort the opportunities by any column in the list by clicking the column heading.
9. Select the opportunity you want to view or modify from the list in the tab. The basic information about the opportunity appears in the tab.
10. If you want to view notes for this opportunity, then click **Opportunity Notes**.
11. If you want to view more details about the opportunity, then click **Details** to launch the Opportunity Center.

7.3 Turning a Lead into an Opportunity

An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order. Use this procedure to turn a lead into an opportunity.

Prerequisites

Display the lead in the Lead Center or on the Lead tab of the eBusiness Center.

Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

Navigator > eBusiness Center > Lead

Steps

1. If the lead does not have a description, enter it now in the Lead Name field. A lead name is required for opportunity creation.
2. Click **Create Opportunity**.
3. The application checks the lead information you have entered in the lead against information in all existing opportunities to see if a similar opportunity already exists.

4. If a potentially duplicate opportunity exists, then the Lead Linking window appears. Check for duplicate opportunities to see if you must create a new opportunity or link any items to an existing one.

Guidelines

When a lead is converted to an opportunity, then the lead status becomes read only if the system profile option *OS: Lead New State Transition* is set to *Yes*.

7.4 Checking for Duplicates When Creating Opportunity from a Lead

Use this procedure to check for duplicate opportunities when you are creating an opportunity from a lead and the Lead Linking window appears.

If you find a duplicate, then you can copy any new items the customer is interested in purchasing into an existing opportunity rather than creating a new one. This window appears automatically when the application determines potential duplicates exists. If this window does not appear, you cannot perform a duplicate check.

Note: Agents can create links to opportunities even when they do not have access to those opportunities.

Prerequisites

You can only check for duplicate opportunities if the Lead Linking window appears when you are creating an opportunity from a lead.

Steps

1. The left pane displays the current lead. The right pane displays information on possible duplicate opportunities.
2. In Opportunity Information, select the first opportunity listed.
3. Click **Detail**.
4. The detail of the opportunity you selected displays in the right pane.
5. If the opportunity does not match the lead and more than one potential match was found, then scroll through the possible matches using the Next button. The number of potential matches is displayed in the Matches Found field.
6. If the lead on the left matches an opportunity on the right, then:

- a. Move any new purchase items from the lead into the opportunity using the right arrow key in the middle of the window.
 - b. Click **Link**.
7. If none of the opportunities found match, then click **Create Oppty** to create a new opportunity.

Guidelines

Your application administrator sets the criteria that are used to check for potential duplicate opportunities.

7.5 Creating an Opportunity Without a Prior Lead in the eBusiness Center

Use this procedure to create an opportunity without a prior lead. An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. In the View Details For region, select the person, organization, or contact for the opportunity.

Note: When you create an opportunity for an organizational contact the lead is recorded for the organization and the contact is listed as the primary contact for the opportunity.

2. Select the Opportunity tab.

The opportunities created for this person or organization, if any, are listed in the left side of the tab.

3. Click **New**.
4. Enter the basic opportunity information in the fields provided. The fields include opportunity name, project name, source code, status, and budget.

Note: Depending on your implementation, the status of an opportunity determines whether it appears in your forecast or not.

5. Enter a close date for the opportunity. This date determines the forecast in which your opportunity information appears.

Note: You can enter a customer's purchase interests directly on the Opportunity tab, but you must scroll to view additional fields. If you want more room to work in, then click **Details** and make your entries on the Purchase Interest tab of the Opportunity Center instead.

6. If you want to enter customer purchase interests directly on the Opportunity tab, then for each purchase line:
 - a. If you do not know the Product Category, but you know at least a partial description of the same, then use the Product Category and Description List of Values (LOVs) to enter the Product Category.
 - b. If you know the Inventory Item number, then use the Inventory Item LOVs to enter it. The Product Category and Item Description fields fill in automatically.
 - c. If you do not know the Inventory Item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by Item Description. When you enter an item description, the Product Category and Inventory Item fields fill in automatically.
 - d. The Forecast Date automatically sets to the Close Date of the opportunity. Changing this date does not affect the forecast unless Use Close Date is deselected. See [Section 7.26, "Splitting Up a Purchase Line for Inclusion in Multiple Forecasts"](#) for more information.
 - e. The Source Code and Offer fields default to the source code entered in the header for the opportunity as a whole. If this purchase line is related to a different source code than the opportunity header, then make another selection.
 - f. Optionally, enter the Units of Measure and quantity of the item.

- The close date at the purchase line level is within the forecast period.

Note: In some implementations, it is possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This can result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab in the Opportunity Center to override territory assignment and prevent this from happening.

You cannot create an opportunity for an account.

7.6 Linking an Opportunity to Leads

Use this procedure to link an existing opportunity to one or more leads.

Prerequisites

The profile option OS: Linking Opportunity to Lead must be set to *Allowed with Prompt* or *Allowed*.

Navigation

Navigator > eBusiness Center > Opportunity

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. View the opportunity in either the eBusiness Center or the Opportunity Center.
2. Activate lead linking in one of the following ways:
 - View the opportunity on the Opportunity tab in the eBusiness Center and choose **Link Opportunity to Lead** from the Actions menu.
 - View the opportunity in the Opportunity Center and choose **Link Opportunity to Lead** from the Actions menu.
 - View the opportunity in the Opportunity Center and on the Lead tab click **Link Opportunity to Lead**.

The Opportunity - Lead Linking window displays the current opportunity and all open leads for the customer that are not linked to an opportunity.

3. If you want to see the detail for a lead, select the lead and click **Detail**.
4. Select the lead or view the detail for the lead, and click **Link**.

The lead is linked to the opportunity.

7.7 Displaying an Opportunity in the Opportunity Center

You can display an opportunity in the Opportunity Center in a number of ways:

- Use the Universal Search window to search for the opportunity using multiple search criteria.
- Display the opportunity in the eBusiness Center and then click **Details**.
- Double-click the opportunity in the Universal Work Queue.
- Navigate to the opportunity from the opportunity summary in the Dashboard tab of the eBusiness Center.

7.8 Creating an Opportunity in the Opportunity Center

Use this procedure to create an opportunity in the Opportunity Center without a prior lead. An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order.

Steps

1. Navigate to the Opportunity Center.
2. Click **New**.
3. Enter the basic opportunity information in the fields provided. The fields include opportunity name, project name, source code, status, and budget.

Note: Depending on your implementation, the status of an opportunity determines whether it appears in your forecast or not.

4. Enter a close date for the opportunity. This date determines the forecast in which your opportunity information appears.
5. Click **Save** on the toolbar.

Guidelines

The administrator has the right to limit the maximum number of days allowed to close an opportunity. The opportunity close date should fall within the allocated period set by the administrator (must not be greater than the system date + maximum number based on profile).

If the system profile option *OS: Maximum number of days allowed to close an opportunity* is set and you enter a date that exceeds the one specified by the administrator, then re-enter the close date.

An opportunity appears in the forecast if it meets the following criteria:

- The opportunity status is a status that is set up as forecastable.
- The close date at the purchase line level is within the forecast period.

7.9 Entering Purchase Interests

Use this procedure to enter a customer's purchase interests into an opportunity.

Prerequisites

You must create the opportunity first.

Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. Enter the customer's purchase interests. For each purchase line:
 - a. If you do not know the Product Category, but you know at least a partial description of the same, then use the Product Category and Description LOVs to enter the product category.
 - b. If you know the Inventory Item number, then use the Inventory Item List of Values (LOV) to enter it. The Product Category and Item Description fields fill in automatically.

- c. If you do not know the Inventory Item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by Item Description.

When you enter an item, the Product Category and Inventory Item fields fill in automatically.

- d. If you do not know the exact product the customer is interested in, then you can use the Product Category code LOV to enter the customer's general purchase interest.
- e. Enter an Product Category if none appears.
- f. The Forecast Date automatically defaults to the Close Date of the opportunity. Changing this date does not affect the forecast unless Use Close Date is deselected. See [Section 7.26, "Splitting Up a Purchase Line for Inclusion in Multiple Forecasts"](#) for more information.
- g. Optionally, enter the Units of Measure and quantity of the item.
- h. Enter a currency amount of the purchase interest. This amount is added to the other purchase line amounts to give you the total purchase amount for the opportunity.
- i. Enter the sales credit. (See [Section 7.28, "Entering Sales Credit for Purchases in an Opportunity"](#) for more information). The sales credit is the amount included in your sales forecast.

4. Click **Save** on the toolbar.

Guidelines

The administrator has the right to limit the maximum number of days allowed to close an opportunity. The opportunity close date should fall within the allocated period set by the administrator (must not be greater than the system date + maximum number based on profile).

If the system profile option *OS: Maximum number of days allowed to close an opportunity* is set and you enter a date that exceeds the one specified by the administrator, then re-enter the close date.

7.10 Entering Opportunity Contacts

Use this procedure to enter contacts into an existing opportunity using the Opportunity Center. You can enter the primary contact directly in the header of the

Opportunity Center. If you want to add any additional contacts, then you must do so using the Contact tab.

Prerequisites

The contacts you want to add must already be in the database as the organizational contacts.

Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.
2. If you want to add the primary contact for the opportunity, then:
 - a. Use the Primary Contact List of Values (LOV) to select the contact.
 - b. Select a role for the contact using the Contact Role LOV.
 - c. Click **Save** on the toolbar.
3. If you want to enter additional contacts in the Opportunity Center, then:
 - a. Select the Contact tab.
 - b. Using the Last Name or First Name List of Values, add the contacts.
 - c. If you want to designate a contact as the primary contact for the opportunity, then select the Primary check box next to the record. You can only designate one contact as a primary contact for the opportunity.
 - d. Click **Save** on the toolbar.
4. If you want to enter a note for the contact, then click **Contact Note**.
5. If you want to enter a note for the customer, then click **Customer Note**.

7.11 Classifying an Opportunity

Use this procedure to classify an existing opportunity. The Oracle Territory Management program uses this classification to assign a sales team.

Navigation

Navigator > eBusiness Center > Opportunity

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Classification tab.
3. Use the Lists of Values to classify the opportunity according to the classification scheme provided by your organization.
4. Click **Save** on the toolbar.

7.12 Tracking Obstacles to an Opportunity

Use this procedure to track obstacles to a sale such as competitors.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Obstacle tab.
3. Use the Issue LOV to enter an issue.
4. Select a Status.
5. Enter a comment.
6. Click **Save** on the toolbar.

7.13 Tracking Competition for an Opportunity

Use this procedure to track competitors for a sale.

Prerequisites

The opportunity must be created first and there must be at least one purchase interest.

Steps

1. Display the opportunity in the Opportunity Center.

2. Optionally, select the key competitor for the whole opportunity in the header.

Note: This field is required if the profile option *OS: Competitor required for Opportunity* is set to Yes.

3. Select the Win/Loss tab.
4. Optionally, from the Actions menu choose **Opportunity Competitor**.
The Competitor Header Information window appears.
 - a. Use the LOV to select a competitor.

Note: Competitors are set up in Oracle Marketing.

- b. Enter the product names.
 - c. Save your work.
 - d. Click **Close**.
5. In the Competitor Products region, use the LOVs to enter any competitors and their products. You can add a free text comment in the Comments field.
6. In the Decision Factors region, enter decision information.
7. Click **Save** on the toolbar.

7.14 Selecting Individuals and Sales Groups for the Opportunity Sales Team

Use this procedure to manually add sales agents to an opportunity sales team. You can add individuals or entire sales groups to your team with this procedure.

Adding someone to the sales team makes them able to view an opportunity and add notes and tasks. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the opportunity.

If your organization has implemented the Oracle Territory Manager module, then a sales team is assigned to an opportunity automatically. However you can use this procedure to override any automatic assignment by selecting the Keep check box.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Sales Team tab.

The tab lists the current sales team.

If your organization has set up the Oracle territory management module, then the sales team is automatically assigned to the opportunity when you create it.

3. If you want to add the team members of an entire sales group, then:

- a. Click **Add Resource Team**.

The Add Resource Team window appears.

- b. Search for the sales team you want to add by entering its name or partial name in the Team Name and clicking **Find**. Use the percent sign to substitute for any missing characters.

The sales teams that match your search criteria appear in the Team Name column.

- c. Select the sales team you want to add by placing your cursor anywhere in the record.
- d. The names of the individuals on the sales team appear.
- e. If you want to provide the new team members with rights to modify opportunity information, then select the Provide Full Access check box.
- f. Click **OK**.

The sales group sales team is added to the opportunity sales team. Each individual has the Keep check box selected. This means that their assignment cannot be overridden by the Territory Manager module.

4. If you want to add an individual sales team member, then, in the Internal Sales region:
 - a. Use the Last Name or First Name List of Values to add the sales agent.
 - b. If you want this individual to have update privileges for this opportunity, then select the Full check box. All team members have view privileges.
 - c. If you want to keep this individual regardless of the assignment made by the Oracle Territory Management module, then make sure the Keep check box is selected.
 - d. Click **Save** on the toolbar when you have completed adding agents.

5. If you want to designate someone as the owner of the opportunity, then select the **Owner** check box next to the salesperson's name.
6. If you want to add a partner to the sales team, then in the External region use the LOV to select the partner.

Guidelines

The resource groups you can add to the sales team are set up by your application's administrator using the Resource Manager. See the *Oracle TeleSales Implementation Guide* for details.

Note: In some implementations, it is possible for agents to lose access to customer, lead, and opportunity records they create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This can result in an agent losing access to that information. If you want to prevent this from happening, make sure you select the Keep check box next to each name on the Sales Team tab to over-ride territory assignment.

An opportunity can have only one owner. The owner has final responsibility for the opportunity and for updating the opportunity information. At the time the opportunity is created the user creating the opportunity is defaulted as the owner. The owner can be changed only by the current owner, the current owner's manager, or a user with the profile option *OS: Privilege to change Opp Owner* set to Yes.

7.15 Viewing Partner Selection Criteria and Routing History for an Opportunity

Use this procedure to view information about what services partners are selling and the history of partner activity for the opportunity.

You can only view the routing history of one partner at a time although an opportunity can be assigned to multiple partners.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Partner tab.

The Preferred Partner field lists a partner associated with this opportunity.

The Additional Channel and Services region lists the services this partner is offering.

3. If you want to view a history of partner interactions for this opportunity including which partners were offered the opportunity, then click **Routing Details**.

7.16 Routing an Opportunity to a Partner

Use this procedure to enter the criteria the routing manager will use to select a partner for the opportunity or, if you have the permission, route the opportunity to a partner directly.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Partner tab.
3. If you want to route the opportunity to a partner and have the permission to do so, then:
 - a. Use the Preferred Partner List of Values (LOV) to select the partner you want to route to.
 - b. If you want to bypass the channel manager approval, then select the Bypass CM Approval check box. If you cannot select this check box, this means you do not have permission to do so.
 - c. Click **Submit Routing**.

The Routing Status field tells you the status of your request and whether the partner has accepted or not.

4. If you want to enter criteria that will be used by the channel manager to select a partner, then use the Attributes, Attribute Value, and Description LOVs to describe the type of appropriate partner you want.
5. Click **Save** on the toolbar when you are finished.

7.17 Viewing Leads Associated with an Opportunity

Use this procedure to view any leads that are linked to an opportunity.

Prerequisites

The opportunity must be created first.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Lead tab.

The leads that are linked to this opportunity are listed.
3. If you want to view any of the leads, then:
 - a. Select the lead.
 - b. Click **Lead Center**.
 - c. If you want to view details of multiple leads in separate Lead Centers, then select the Display Multiple Lead Centers check box.

7.18 Freezing an Opportunity

Use this procedure to freeze an opportunity so that modifications cannot be made to the header and purchase interest tab information. After an opportunity is frozen, nobody, including the person who froze the opportunity, can make a modification unless they obtain permission from the application administrator.

Prerequisites

You must be on the sales team for the opportunity to freeze it.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > eBusiness Center > Opportunity

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity tab of the eBusiness Center or in the Opportunity Center.
2. Select the Freeze check box.
3. Click **Save** in the toolbar.

Guidelines

An opportunity with the Freeze check box selected can only be updated by people with special responsibility which is set up by your application administrator using the *Update Frozen Opportunities* system profile option.

7.19 Splitting Up an Opportunity If Only Some Items Can Close

Use this procedure to split up an opportunity so that you can close on some purchase items while others remain open. You first make a copy of the opportunity and then specify the items you want to split by making deletions from the copy and the original.

Steps

1. Display the opportunity in the Opportunity Center.
2. Click **Copy**.
The Copy Opportunity window appears.
3. Click **Copy**.

The Opportunity Center displays the copy you have made. The only information changed is the opportunity number which is automatically incremented to the next available number.

4. Rename the copy you have made.
5. Using **Clear Record** from the toolbar, delete from the copy the purchase items which are to close.
6. Click **Save** in the toolbar.

7.20 Deleting Purchase Items from an Opportunity

Use this procedure to delete purchase items from an opportunity.

Prerequisites

You must be designated as a team leader on the sales team for the opportunity.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. Select the purchase item you want to delete.
4. Click **Delete** on the toolbar or choose **Delete** from the Edit menu.
5. Save your work.

7.21 Copying an Opportunity

Use this procedure to copy an opportunity. Copy an opportunity if you want to split an opportunity, for example, or if different customers want to purchase the same set of items.

Steps

1. Display the opportunity in the Opportunity Center.
2. Click **Copy**.
The Copy Opportunity window appears.
3. If you want the copied opportunity to go to a different party type, then select the party type from the LOV.

4. If you want the copied opportunity to go to a different customer, then select the customer using the Customer LOV.
5. Optionally, select an address using the Address LOV. It appears in the Location field.
6. Enter a name for the opportunity. The default is "Copy of" (unless your administrator changed this to something else) followed by the original opportunity name.
7. Select the check boxes corresponding to the information you want to copy to the new opportunity. The header information, including key competitor, is copied automatically.
8. Click **Copy**.

The Opportunity Center displays the copy you have made. The only information changed is the opportunity number which is automatically incremented to the next available number.

7.22 Updating Opportunities

You can update opportunities in one of three ways:

- Update opportunities one at a time using the Opportunity Center.
- Update the win probabilities, sales stages, close dates, and channel fields for a list of opportunities using the Mass Opportunity window. You must create a list using the Universal Search window and update all opportunities on that list to the values you enter in the Mass Opportunity Update window.
- Update multiple opportunities in one window. This method allows you to query up the opportunities you want to modify and modify each opportunity individually in one window.

7.23 Performing a Mass Update of Opportunities

Use this procedure to update a list of all opportunities you want to update with the same value.

Use this procedure to update the win probabilities, sales stages, close dates, and channel fields for a list of opportunities. If you want to open multiple opportunities in one window so that you can update their values one at a time, then you must instead use the Pipeline Management window. See [Section 7.24, "Updating Your Pipeline"](#) for the procedure.

Prerequisites

You must first use Universal Search to create a saved list of opportunities you want to update.

Navigation

Navigator > Opportunity Mass Update

Steps

1. Navigate to Opportunity Mass Update.
The Mass Update of Opportunities window opens.
2. Use the Lookup Name List of Values (LOV) to find your saved list of opportunities you want to update.
3. Click **Search**.
The opportunities on the list appear.
4. Select the opportunities you want to update by selecting the Select check box for each.
5. Make entries in the win percentage, sales stages, close dates, and channel fields for each entry.
6. Click **Mass Update**.

7.24 Updating Your Pipeline

You can change multiple opportunities by entering different values for each in a grid format and then saving.

Use this procedure to update multiple opportunities at the same time using the pipeline management window.

Navigation

Navigator > Pipeline Management

Steps

1. From the Navigator, select Pipeline Management.
The Pipeline Search Criteria window appears.
2. Enter your search criteria.

- You can use the percent sign to substitute for any missing characters.
- You can enter one value or a range of values for win probability, close date, total amount, and sales credit amount.
- Select one of the Credits radio buttons to search for opportunities with forecast credits, other (non-revenue) credits, or all for the agent listed in the Sales Agent field.

Note: The application uses the logical AND to connect your search criteria. Each field you enter restricts your search further.

3. If you belong to or manage multiple sales groups, then you can restrict the search to a particular sales group by selecting that sales group from the Sales Group List of Values (LOV).
4. If you manage a sales group, you can restrict the search to a single member of the sales group. To do so, use the Sales Agent field LOV to enter the name of the subordinate.

Note: If you do not manage a sales group, you can only search for your own opportunities. In this case, your name prefills the Sales Agent field automatically.

5. **Click Search.**

The Pipeline Search Results window appears displaying the results of your search.

6. If you need to modify the search, then click **Return to Search** to return to the Pipeline Search Criteria window.
7. If you want to update the win probability (Win %), status, close date, channel, sales stage, close reason, or key competitor for an opportunity, then make your entry in the list of opportunities.

Note: You must use the scroll bar to reveal the Sales Stage and Close Reason fields.

8. If you want to view the total revenue amount of the opportunities listed, then click **Calculate**.
9. If you want to change the purchase interest for an opportunity, then:
 - a. Select the opportunity you want to modify from the list at the top of the window. You can click in any field to select an opportunity.
The purchase interest information for that opportunity appears.
 - b. Make your modifications.

Note: You must use the scroll bar to reveal the quantity, purchase amount, and other fields.

10. If you want to modify the sales credit for individual items in an opportunity, then:
 - a. Select the opportunity you want to modify from the list at the top of the window.
The purchase interest information for that opportunity appears.
 - b. Select the item.
 - c. From the Display drop-down list, select Forecast Credit or Other Credit.
 - d. Modify the credit amounts for the item.
11. Click **Submit Changes** to save your work.
12. If you want to close the window, then from the File menu, choose **Close Form**.

7.25 Working With Opportunities in the Universal Work Queue

The Universal Work Queue displays a list of opportunities for quick navigation and update. There are two display options for the Universal Work Queue, one with the queue listed on the left side of the window, and the other with the choices in a cascading menu.

Navigation

Navigator > Universal Work Queue

Steps

1. In the Select Items list or the UWQ nodes, select either My Opportunities (Sales Credits) or My Opportunities (Sales Team). Optionally, you can select your choice and skip steps 2 and 3.
2. Select one of the following options:
 - Closing Within 30 Days: Open opportunities scheduled to close in the next 30 days
 - Closing Within 90 Days
 - Closing Within 6 Months
 - Closing Within 1 Year
 - All: All open opportunities

The next selection list appears.

3. Select a status.

The window displays a list of opportunities that match the selected criteria and displays related note history for any selected opportunity.

4. If you want to update an opportunity, then perform the following steps:
 - a. Select the opportunity and select your choice from the Action drop down list. If you select more than one opportunity, then some actions are not available.
 - b. Enter or select your changes.
 - c. Optionally, enter a note.
 - d. Click **Apply**.

Your changes are saved for one or more selected opportunities.

5. Optionally, double-click in a row to open the opportunity in the Opportunity Center.

Guidelines

The Update Opportunity region can be customized by the Universal Work Queue administrator. The administrator can create new actions in the Action drop down list, disable seeded actions, change the order of actions in the list, and control the order of notes in Note History.

7.26 Splitting Up a Purchase Line for Inclusion in Multiple Forecasts

Use this procedure to split up an opportunity purchase amount so that it appears in multiple forecasts over a period of time. This is called a rolling purchase line. Suppose, for example, you are selling a \$1200 service on a subscription basis and your customer makes twelve monthly payments. In this case you can use this procedure to spread out the total over the twelve-month period so that only \$100 appears in each monthly forecast.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. In a blank purchase interest line, place your cursor in the Amount field.
4. Choose **Rolling Purchase Lines** from the Actions menu.
The Rolling Purchase Lines window appears.
5. The forecast date defaults to the close date of the opportunity. Changing this date also changes the close date.
6. Enter the number of periods you want to copy this purchase line into.
7. Enter the interval for the periods. This determines the forecast dates for each period.
8. If you know the Inventory Item number of the purchase, then use the Inventory Item LOV to enter it. The Product Category and Item Description fields fill in automatically.
9. If you do not know the Inventory Item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by Item Description.
When you enter an item, the Product Category and Inventory Item fields fill in automatically.
10. The Source Code field defaults to the marketing source code entered in the header for the opportunity as a whole. If this purchase line is related to a different source code than the opportunity header, then make another selection.
11. Optionally, enter the Units of Measure and quantity of the item the customer is purchasing in each of the periods.

12. Enter the amount of the purchase to appear for each period. This is the amount included in each forecast and added to the other purchase line amounts to give you the total purchase amount for the opportunity.

13. Click **Add Lines**.

The application creates purchase lines in the Purchase Interest tab corresponding to the number of periods. Each new line is identical except for the Forecast Date.

14. Click **Save** on the toolbar.

You are now ready to enter the sales credit for the purchases you have entered.

Guidelines

The administrator has the right to limit the maximum number of days allowed to close an opportunity. The opportunity close date should fall within the allocated period set by the administrator (must not be greater than the system date + maximum number based on profile).

If the system profile option *OS: Maximum number of days allowed to close an opportunity* is set and you enter a date that exceeds the one specified by the administrator, then re-enter the close date.

7.27 Using Personal Opportunities Lists

When you perform a Universal Search using Opportunity as the criteria, you save the search results as a list in the Saved Results window. This way you have created a personal opportunity list of your customers, which can be viewed and updated in the Universal Work Queue (UWQ). See [Section 3.6, "Creating a List"](#) for more information on how to create a list.

With the help of personal opportunities lists, you can manage all those opportunities that you want to work on currently. After you create your personal opportunities lists, work on the desired opportunity from the lists, and use the work panel to update the lists.

Use this procedure to update the personal opportunities lists.

Steps

1. Launch the Universal Work Queue window from the Navigator.
2. Select the work type as **Personal List - Opportunities**.

The personal opportunities lists appear in the UWQ window.

3. If you want to update an opportunity, a task, or a note, then select an action from the drop-down list using the work panel.

The work panel in the UWQ helps you to update the opportunity, close the opportunity, create a task, or create a note.

4. Optionally, double-click in a row to open the opportunity in the Opportunity Center.
5. Click **Apply**.

The personal opportunities list is updated based on the action that you selected in the work panel. You can also view all the opportunity notes in the UWQ window.

7.28 Entering Sales Credit for Purchases in an Opportunity

Use this procedure to assign sales agents and partners both revenue and non-revenue sales credits for the individual purchases in an opportunity. You must enter the sales agents and the sales credits they are to receive separately for each item in the opportunity.

Steps

1. In the Opportunity Center, select the Purchase Interest tab.
2. Using the select field to the left of a purchase item, select the purchase item for which you want to assign sales credits.

Any sales agents already receiving credit for this item are listed in the lower portion of the tab.
3. From the Display drop-down list, select the type of sales credit you want to assign for this item:
 - **Forecast credit:** Revenue credit amounts that show up in the forecasting module of Oracle Field Sales.
 - **Other Credit:** Non-revenue credit. For example, credit toward sales quotas.
4. If you want to modify the existing credits that agents or partners are to receive for the item, then:
 - a. Modify the numbers in the % field for the agent.
 - b. If you are modifying forecast credits, then you must modify the credit percentages for other agents and partners so that the total adds up to 100 percent.

- c. Click **Save** on the toolbar.

Note: The percent amounts of forecast credits you assign to sales team members and partners must add up to 100 because you are adding up actual revenue. For other non-revenue credits any percentage is allowed.

- 5. If you want to add any additional salespeople who are to receive sales credit for this item, then:

- a. Use the Sales Agent List of Values (LOV) to enter a sales agent. If no blank record lines appear, then use the New button in the toolbar to add an additional record.
- b. In the % field, enter the number corresponding to the percentage of commission the individual is to receive.

Any new sales person you add here is automatically added to the sales team for the opportunity.

- c. If you are assigning revenue credit, then adjust the credit percentages of the other sales agents and partners for this item so the total adds up to 100 percent.
- d. Click **Save** on the toolbar.

- 6. If you want to add any additional partners who are to receive sales commissions for the sale of this item, then:

- a. Use the Partner Name LOV to enter a partner. If no blank record line appears, then use the New button in the toolbar to add an additional record.
- b. In the % field, enter the number corresponding to the percentage of commission the individual is to receive for this item. Do not enter a percent sign.

Note: The percent amounts of revenue credits you assign to sales team members and partners must add up to 100. For non-revenue credits any percentage is allowed.

- c. If you are entering revenue credits, then adjust the credits of the other sales agents and partners, so the total adds to 100 percent.

- d. Click **Save** on the toolbar.

7.29 Viewing Sales Credit Totals for an Opportunity

Use this procedure to view the total sales credit sales team members are to receive on all the purchase items in an opportunity.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Sales Team tab.
3. Click **View Credit Total**.

The Opportunity Credit Total window appears. The window lists both the revenue and non-revenue credit totals for each agent and partner for this opportunity.

Note: The terminology in this window is different from that used in the Purchase Interest tab. The label Quota Sales Credit refers to Forecast Credit (actual revenue). The label Non-Quota Sales Credit refers to Other Credit (non-revenue).

7.30 Closing an Opportunity So You Can Receive Sales Credit

Use this procedure to enter or view closing information for an opportunity. To receive sales credit and to assure accurate pipeline reports, you must close an opportunity and enter a close reason after placing an order for a customer.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Win/Loss tab.
3. Use the Close Reason List of Values (LOV) to enter the close reason.
4. If this opportunity has been won, then the resulting orders are listed in the Win region.
5. If you lost the order, then enter the competitor using the LOV provided and any comment.

6. If the opportunity resulted in a sale by a reseller, then choose Reseller Information from the Actions menu and add the information.
7. Enter the rest of the closing information for the opportunity. Depending on your implementation you may be required to enter:
 - Win Probability
 - Close Date
 - Sales Stage
8. Change the Status. If you made the sale, then change the status to won.

Note: To change the status of an opportunity to Won, Lost, or No Opportunity, you must enter the close reason first.

9. Click **Save** on the toolbar.

Note: Changes made in the Opportunity Center are not immediately reflected in the Opportunity tab. You must refresh the eBusiness Center display first.

7.31 Viewing the History of an Opportunity

Use this procedure to view a lot of all activities and changes made to an opportunity.

Navigation

Navigator > Opportunity Center

Navigator > eBusiness Center > Opportunity Tab

Navigator > Pipeline Management

Steps

1. Display the opportunity in the Opportunity Center, eBusiness Center, or Pipeline Management Center.
2. From the Actions menu, choose **Opportunity History**.

The Opportunity Log window list the history of changes made to the opportunity.

Guidelines

The system and user profile option *OTS: Opportunity History Expanded Display* determines if the history log displays in expanded or collapsed format. The expanded format displays the location in global address format and contains the additional columns: Owner Sales Group, Key Competitor, Response Channel, Source Name, and Offer Name.

Quotes, Proposals, and Orders

This chapter describes viewing, updating, and creating quotes, proposals, and orders. Sections in this chapter include:

- [Section 8.1, "Overview of Quotes, Proposals, and Orders"](#)
- [Section 8.2, "Viewing and Modifying Quotes"](#)
- [Section 8.3, "Working with Orders in the eBusiness Center"](#)
- [Section 8.4, "Creating a Quote Without a Lead or Opportunity"](#)
- [Section 8.5, "Viewing a Customer's Quotes, Proposals, and Orders for a Specific Opportunity"](#)
- [Section 8.6, "Creating a Quote from an Opportunity"](#)
- [Section 8.7, "Creating a Proposal for an Opportunity"](#)
- [Section 8.8, "Creating a Proposal for a Customer"](#)

8.1 Overview of Quotes, Proposals, and Orders

Use the Quote, Proposals, and Order tabs to view quotes created in Oracle Quoting - Forms, proposals created in Oracle Proposals, and orders placed with Oracle Order Management. You can launch Oracle Quoting - Forms from the Quote tab to create new quotes, launch Oracle Proposals from the Proposals tab to create new proposals, and launch Oracle Order Management from the Order tab to create new orders.

8.2 Viewing and Modifying Quotes

Use this procedure to view or modify a quote for a customer.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you want to view the quotes for a consumer, then, in the View Details For region, select the person's name.
2. If you want to view the quotes for an organization, then, in the View Details For region, select the organization's name.
3. Select the Quote tab.
The tab displays the list of quotes.
4. Select a quote from the list.
5. Click **Details**.

Oracle Quoting - Forms appears displaying the quote. Follow the procedures outlined in the Oracle Quoting - Forms documentation to modify quotes.

8.3 Working with Orders in the eBusiness Center

Use this procedure to view a list of orders for the customer displayed in the eBusiness Center. You can also update an existing order or create a new order.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you want to view the orders of a consumer, then, in the View Details For region, select the person's name.
2. If you want to view orders for an organization, then select the name of the organization.
3. If you want to view orders for which the contact is the order customer contact, then, in the View Details For region, select the person and organization relationship.
4. If you want to view orders that belong to a specific account, then select the account in the header and select the account in the View Details For region.
5. Select the Order tab.
6. Optionally, change the order creation date range of orders to view.
7. Optionally, select to filter records by order status, order type, or order source.
8. If you selected a filter, then select a value for the filter.
9. Click **Apply**.

The tab displays the orders that match the filtering criteria in a dynamic table.

10. If you want to view the quote used to create the order, then click the link in the Order Source column.

If the quote was created in Oracle Quoting, then the quote opens in the Oracle Quoting window.

11. If you want to view details or update order information, then click **Detail**. Alternatively, you can double-click an order.

The order opens in the Oracle Order Management window.

12. If you want to create a new order, then click **New**.

The Oracle Order Management window opens.

Guidelines

You can only view details of an order if the order belongs to your operating unit. Yes appears in the Order Details column if you can view the details.

The default filter type is determined by the profile option *OTS: Order History - Default value for the Filter*. This is both a system profile and a user profile.

The default date range is determined by the profile option *OTS: Order History - Number of months to Display Orders*. This is both a system profile and a user profile.

The profile option *OTS: Order History - View Orders across Operating Units* determines if you can view order history only for your operating unit or for all operating units.

8.4 Creating a Quote Without a Lead or Opportunity

Use this procedure to create a quote for a consumer or an organization directly without using an opportunity to track the sales process.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you are creating a quote for a consumer, then, in the View Details For region, select the person's name.
2. If you creating a quote for an organization, then, in the View Details For region, select the organization's name.
3. Select the Quote tab.
4. Click **New**.

The Quoting window opens. Follow the instructions outlined in the Oracle Quoting - Forms documentation for preparing quotes.

8.5 Viewing a Customer's Quotes, Proposals, and Orders for a Specific Opportunity

Use this procedure to view a customer's past orders, proposals, and quotes.

Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.

2. Select the Quote/Order tab.
3. If you want to view previous orders from the customer, then:
 - a. Select **Orders**.

The customer's orders in accounts receivable are listed in the tab.
 - b. Select an order you want to view.
 - c. Click **Details** to view details of the order in a separate window in Oracle Order Management.
4. If you want to view quotes for this customer, then:
 - a. Select **Quotes**.

The customer's quotes are listed in the tab.
 - b. Select a quote you want to view or modify.
 - c. Click **Details** to view details of the quote in an Oracle Quoting - Forms window.
5. If you want to view proposals for the opportunity displayed in the header, then:
 - a. Select the Proposals tab.
 - b. Click **Details** to view or update the details of the proposal in a separate window in Oracle Proposals.

8.6 Creating a Quote from an Opportunity

Use this procedure to create a quote from an opportunity. You must enter an inventory item as a purchase interest before you can create a quote.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. Enter inventory items and quantities for the purchase interest.
4. Click **Create Quote** in the Opportunity Center header.

The Quote Creation window opens.
5. Follow the instructions outlined in the Oracle Quoting - Forms documentation for preparing quotes and booking orders.

6. You must close the opportunity so you and others on the opportunity sales team can receive sales credit.

8.7 Creating a Proposal for an Opportunity

Use this procedure to create a proposal from an opportunity displayed in the Opportunity Center. You can create a proposal for a read-only opportunity as well as for an opportunity that you can modify. No interaction is recorded when you create a proposal. Only the creator of a proposal can modify it.

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Proposals tab.
3. Click **New**.
Oracle Proposals opens.
4. Follow the instructions in the Oracle Proposals documentation for creating the proposal.

8.8 Creating a Proposal for a Customer

Use this procedure to create a proposal for a customer displayed in the eBusiness Center header. No interaction is recorded when you create a proposal. Only the creator of a proposal can modify it.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. Select the correct View Details For.
2. Select the Proposals tab.
A list of proposals relating to the selection in step 1 appears. If you chose a party relationship, then you will see all proposals for which the selected contact is the primary contact for the proposal.
3. Click **New**.
Oracle Proposals opens.

4. Follow the instructions in the Oracle Proposals documentation for creating the proposal.

Interacting with the Customer

This chapter discusses how to use the application during a customer interaction such as an inbound call. Major activities such as updating customer information and working with leads and opportunities are covered in other chapters. Sections in this chapter include:

- [Section 9.1, "Overview of Interacting with the Customer"](#)
- [Section 9.2, "Displaying a Summary of Customer Data"](#)
- [Section 9.3, "Using the At A Glance Window"](#)
- [Section 9.4, "Starting a Web Collaboration Session"](#)
- [Section 9.5, "Entering the Marketing Source Code in the eBusiness Center"](#)
- [Section 9.6, "Launching a Script for Your Customer Interaction"](#)
- [Section 9.7, "Contacting Lists of Customers Supplied by Marketing"](#)
- [Section 9.8, "Working with Personal Contact Lists"](#)
- [Section 9.9, "Viewing Interactions"](#)
- [Section 9.10, "Viewing What Marketing Activities are Targeted to Your Customer"](#)
- [Section 9.11, "Viewing an Organization's Products Under Service Contracts"](#)
- [Section 9.12, "Viewing Contracts a Customer Has with Your Organization"](#)
- [Section 9.13, "Viewing Accounts a Customer Has with Your Organization"](#)
- [Section 9.14, "Sending an E-mail to a Customer"](#)
- [Section 9.15, "Using the Collection Tab"](#)
- [Section 9.16, "Creating a Quick Service Request"](#)

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- [Section 9.17, "Recording Your Interactions with a Customer"](#)
 - [Section 9.18, "Wrapping Up an Interaction with a Customer"](#)
 - [Section 9.19, "Restricting Interactions"](#)

9.1 Overview of Interacting with the Customer

An interaction records customer-related activities in the eBusiness Suite of applications. Each interaction record includes an identifier for the record involved, the time and date the interaction took place, the individual who contacted the customer, and information about the outcome of the interaction. When you end an interaction you are asked to enter information about the outcome of the interaction.

This section covers:

- [Section 9.1.1, "Overview"](#)
- [Section 9.1.2, "Starting and Ending Your Interactions"](#)
- [Section 9.1.3, "Wrap Up"](#)
- [Section 9.1.4, "Simultaneous Interactions"](#)
- [Section 9.1.5, "Viewing Interactions"](#)

9.1.1 Overview

Oracle TeleSales can track agent interactions with customers and the different activities within those interactions. The activities an interaction can track includes the modifying and closing of leads and opportunities, the enrollment of contacts in events, the mailing of collateral, the placing of calls to customers, and so on.

The interaction records an activity whenever an agent:

- Creates a new party of any party type
- Creates a lead
- Ranks a lead
- Declines a lead
- Creates an opportunity
- Closes an opportunity
- Enrolls customers or prospects in an event
- Cancels enrollment
- Sends collateral
- Creates a task
- Queries and views a record

Each activity is itself composed of an action and the object of that action called an *action item*. Interactions track and record the following actions and action items.

Actions:

- Item added
- Lead ranked
- Lead declined
- Opportunity closed
- Event enrollment
- Event enrollment cancelled
- Item Sent
- Query

Action Items:

- Customer
- Lead
- Opportunity
- Event
- Collateral
- Task

You can start an interaction at any time while working in the Opportunity Center, the Lead Center, or the eBusiness Center, by clicking the Start Interaction button on the toolbar. When you end the interaction by clicking on the Wrap-up button, you enter information about the outcome of the interaction in the wrap-up window. The interaction record lists all the activities you performed while the interaction was open.

Your implementation team can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever a record appears in a window that tracks interactions, such as a customer record in the eBusiness Center or an opportunity record in the Opportunity Center. Automatic tracking ends when you search for a new record, change parties, or close the form where the interaction began.

Your implementation team can set up interactions to require you to record the outcomes of your interactions with customers in a wrap-up window or to record a default outcome automatically.

How the Application Tracks Interaction Activities for Party Relationships

Interaction activities recorded for any of the party types which make up a party relationship are recorded as being part of the same interaction. For example, if an agent starts tracking an interaction with Jim Jones, the CEO of Acme Corp., then any activity related to Jim Jones or Acme Corp. is treated as part of the same interaction for Jim Jones, the CEO of Acme Corp. Switching between any of these parties does not close the interaction.

The customer model used by Oracle TeleSales treats any relationships you enter between individuals and organizations as a separate party in the database. For example, when the user creates a new record for Jim Jones, CEO of Acme Corp. the application creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

9.1.2 Starting and Ending Your Interactions

Depending on your implementation, some interactions, such as a call to a customer, start an interaction automatically. You must complete querying your party before the interaction starts automatically. For example, if you selected the party type of Party Relationship and only query the organization name, then the interaction does not start. Or you can start an interaction yourself by choosing Start Interaction from the Tools menu.

You can end the interaction by clicking the Wrapup button from the toolbar, or you can wait for the application to prompt you to end the interaction automatically. This happens whenever you switch parties (change customers) and update the new record.

Note: Merely switching parties does not automatically prompt you to end an interaction with the previous party. You must update the new record first. This allows you to view information from other parties without having to restart the interaction.

You can end an inbound call automatically using default values for the wrapup by clicking Next Call in the eBusiness Center header.

If you choose to start and end an interaction manually, use the Start Interaction and Wrapup buttons on the toolbar. These are the two buttons with a stop light icon: a green stop light for starting and red for ending the interaction.

You can tell when an interaction is being recorded by examining the start and end interaction buttons in the toolbar. If the Start Interaction button is disabled and the Wrapup button is enabled, this means that your interaction is being recorded.

9.1.3 Wrap Up

When you end an interaction, you are asked to enter information about the outcome of the interaction in the Interaction Wrap Up window. You can enter a note for the interaction.

You can create a task from the Wrap Up window.

If you are using Oracle Advanced Outbound, then you can also schedule a call back in the wrapup screen. Choose Call Back for the interaction result, enter the reschedule date and time, and click either End Interaction or Next Call to save the interaction.

9.1.4 Simultaneous Interactions

You can start another interaction while the first interaction is still open. Each Center can track only one interaction at a time, but you can open additional centers and start interactions in each. For example, while you are talking to a customer and viewing customer information in the eBusiness Center you receive a call from a second customer. You open a new eBusiness Center for that customer and both interactions are recording at the same time.

In the eBusiness Center, a second interaction does not start if the first party is a party relationship type and the second party queried in a new eBusiness Center is either the person or organization related to the party relationship in the first eBusiness Center.

When you wrap up an interaction, select the interaction to wrap up from the Customer drop down list.

9.1.5 Viewing Interactions

The list of interactions you can obtain on the Overview tab of the eBusiness Center gives you an audit trail of all of the interactions with customers in any eBusiness Suite application. For example, if someone else in your sales organization makes a

change to an opportunity you are working on, then you will find a record of the interaction here.

You can view the database record involved in any interaction by double-clicking the interaction entry. This displays the database record in the eBusiness Suite application where it was created. For example, double-clicking a record of an interaction on a lead, displays the lead in the Lead Center. Double-clicking a record of a service request, displays the service request in Oracle Customer Care.

9.2 Displaying a Summary of Customer Data

Use this procedure to view a comprehensive overview of critical customer data pertaining to tasks, leads, opportunities, contracts, orders, service, and installed base.

Prerequisites

Display the party in the eBusiness Center header.

The following areas of the Dashboard obtain information from other implemented modules in the Oracle eBusiness Suite:

- Leads and Opportunities: Oracle Sales
- Orders: Oracle Order Management
- Service Requests: Oracle Service
- Quotes: Oracle Quoting
- Installed Base: Oracle Installed Base

Steps

1. In the View Details For region, select the option corresponding to the party or account you want to view. For example, if you want to view data on a consumer, then select the individual's name. If you want to view data about an organization, then select the name of the organization.

Note: Some of the options may be disabled depending on the party displayed in the header.

2. Select the Dashboard tab.

The tab displays data on your customer. Use the scroll bars to view all of the available data categories.

This data is current as of the date and time displayed in the Last Refresh Date field.

3. In the View By drop down list, select whether to view information by customer or account.
4. If you want to view more up to date information, then click **Refresh**.
5. Double-click an item in the Dashboard tab you want to examine in more detail. Or click it once and click **Details**.

The Drilldown List window appears detailing the items that contribute to the summary.

6. Double-click any row in the Drilldown list to display the item in the eBusiness Suite application that created it.

9.3 Using the At A Glance Window

View a customer's recent activities in the At A Glance window and launch an action from the window, such as opening the eBusiness Center, creating a lead, and so on. The window is configured by your administrator. The data is updated periodically when the concurrent program *OTS: At a Glance - Refresh Business Objects* is run by your system administrator. The date and time the information was last updated is displayed when you mouse over the labels in the tables. Notes are real time.

Use this procedure to view activities for a customer and start an action, such as creating a lead.

Navigation

eBusiness Center > At A Glance icon in the toolbar > At A Glance window displays party in the header

eBusiness Center > Navigate To > At A Glance > At A Glance window displays party in the header

Lead Center > At A Glance icon in the toolbar > At A Glance window displays party in the header

Lead Center > Navigate To > At A Glance > At A Glance window displays party in the header

Universal Search > Party Search > Select result and At A Glance check box

Universal Search > Key Customer Search > Select result and At A Glance check box

Steps

1. Navigate to the At A Glance window.

The Summary section of the window lists notes for the party and any or all of the following objects, depending upon the configuration set up by your administrator:

- Leads
- Opportunities
- Quotes
- Tasks
- Product Interests

2. Click the plus sign next to any object you want to view.

The hierarchy expands to list the available categories of the object. For example, the categories of leads can be new leads and qualified leads.

3. Select the category you want to view and double-click.

The table for the selected objects expands and lists all records within the selected category. For example, the Leads table lists all new leads.

4. If you want to view the details for a record, then do one of the following:

- Double-click a lead to open it in the eBusiness Center.
- Double-click an opportunity to open it in the eBusiness Center.
- Double-click a quote to open it in the Quoting window.
- Double-click a task to open it in the Lead Center, Opportunity Center, or eBusiness Center, depending upon where the task was created.

(Product interests have no drilldown capability.)

Note: A new eBusiness Center window opens rather than clearing an eBusiness Center that is already open.

5. Optionally, use the selection list above the table to change categories.

6. Optionally, click the Expand icon to make the selected table the size of the screen.
7. Optionally, change the party for which you want to view notes. For example, if you are viewing a party relationship, then you can view notes for the contact, the organization, or for the person.
8. Optionally, select the action you want to perform. Available actions depend upon your implementation. Also, you will not see actions for any tabs you have hidden in the eBusiness Center. Possible actions include the following:
 - Launch eBC: Opens the party in the eBusiness Center
 - Create Lead: Opens the Lead tab in the eBusiness Center
 - Create Opportunity: Opens the Opportunity tab in the eBusiness Center
 - Create Quote: Opens the Quoting window
 - Create Order: Opens the Order window
 - Create Service Request: Opens the Service Request window
 - Create Note: Opens the Note window
 - Create Task: Opens the Task tab in the eBusiness Center

Guidelines

If the profile option *OTS: At a Glance Dashboard HGrid Expanded Display* is set to Yes, then the hierarchy in the Summary section is already expanded when the window opens.

The notes section shows the creation date and creator's name for each note. Notes appear for either 3 months or 6 months, depending upon the setting of the profile option *OTS: At a Glance - Number of Months of Data to Show*. If the total size of notes queried is more than 32K, then only the notes below the 32K are shown in the form. The queried notes are sorted in the descending order of their creation date.

9.4 Starting a Web Collaboration Session

You can use Oracle iMeeting or other web collaboration vendor to hold a web meeting with a customer. Use this procedure to start a web collaboration session.

Prerequisites

The eBusiness Center or Opportunity Center window must be open.

The profile option *OTS: Enable Web Collaboration* must be set to Yes.

Steps

1. From the Actions menu, choose **Web Collaborate**.
A web collaboration session window opens.
2. If you are using Oracle iMeeting, then choose to either start a quick meeting or join a meeting.

An interaction starts recording when you start a web collaboration session.

Guidelines

When you start a meeting, the URL used for the start page comes from the profile option *OTS: URL for Web Collaborate Start Page*.

9.5 Entering the Marketing Source Code in the eBusiness Center

Use this procedure to enter the marketing source code for your customer. The source code can represent a marketing campaign, an offer, a promotion, or other marketing activity. You must enter a source code before preparing quotes or launching scripts.

Prerequisites

Display the party in the eBusiness Center header and select the appropriate party in the View Details For region.

Steps

1. Select the Overview tab.
2. If the caller does not know the source code name, then click **Search** and search for the source code using the Universal Search window.
3. If the caller knows the source code name, then enter it using the Source Code List of Values.

Guidelines

The source code automatically appears for an incoming call if the Dialed Number Identification Service (DNIS) is attached to the marketing campaign and the profile option *OTS: Match DNIS for Campaign* is set to Yes.

The marketing source code can represent a marketing campaign, an offer, a promotion, or other marketing activity. If the profile option *OTS: JSP Details* is set to yes, then you can double-click the source code or source name to open Oracle Marketing.

9.6 Launching a Script for Your Customer Interaction

Use this procedure to launch a script to guide you in your interaction with a customer or prospect. If you are unable to complete a script with a customer, then the application keeps track of the suspended script so that you or another agent can resume the script on a later call.

Prerequisites

You must display the customer or prospect in the eBusiness header and select the appropriate party in the View Details For region.

Steps

1. In the eBusiness Center, select the Overview tab.
2. If the caller knows the name of the source code, then enter it using the Source Code List of Values.
3. If the caller does not know the source code name, then click **Search** and search for the marketing source code using other criteria, such as the source code name or the medium where the promotion is run.
4. If the View Script button is enabled, click it to launch the script. The button is enabled if one or more scripts are associated with the marketing code or if a default script is set up in the system profile option *OTS: Scripting-Default Script*.

If there is only one script available and no suspended scripts, then the script launches. If there is more than one script or a suspended script, then the Script Chooser Window lists available scripts and suspended scripts.

5. If the View Script button is disabled, this means no specific script has been associated with this source code and there is no default script. In this case, you can view a list of all of the available scripts. Choose **All Scripts** from the Navigate To menu.

The Script Chooser window lists available scripts and suspended scripts.

6. If an appropriate script is available, double-click to launch the script.

7. If you want to search for suspended scripts, then enter or change dates and contact information and click Display.

Suspended scripts that match your criteria appear.

8. Double-click the script you want to use or click **Cancel**.

Guidelines

The suspended scripts displayed in the Script Chooser window are those scripts suspended within the time frame set in the system profile option *OTS: Number of Months to View Notes and Interactions For*.

If the system profile option *OTS: Scripting-Apply Security For Suspended Scripts* is set to Yes, then you can only resume a script you suspended. If it is set to No, then you can resume scripts suspended by other agents.

9.7 Contacting Lists of Customers Supplied by Marketing

You can use the Universal Work Queue to contact lists of customers passed to you by the marketing team using Oracle Marketing. There are two kinds of lists: a generated list that automatically assigns resources and a list with manually assigned resources. The manually assigned marketing lists are imported by an administrator using Oracle Marketing. Use this procedure for contacting customers passed on to you from marketing.

Prerequisites

Campaign is created and is active and within the start and end date range.

Campaign schedule is associated to the campaign and is active and within the start and end date range.

A target list is generated for the campaign schedule.

The campaign schedule is assigned to the agent or a group of agents.

The campaign schedule must be of activity type Direct Marketing and activity Telemarketing.

All contacts must be in the customer database (Trading Community Architecture).

The entries displayed depend on your territory access and the type of marketing list:

- If the *OS: Customer Access Privilege* profile option is set to Full, then you see all entries on the list.

- If the *OS: Customer Access Privilege* profile option is set to Sales Team, then you only see those records for sales teams you are on.
- If the list is a manually assigned marketing list, then you will see all records assigned to you. You need territory access for a contact in order to drill down to the eBusiness Center or to create or update leads or opportunities for a record in UWQ.

Navigation

Navigator > Universal Work Queue

Steps

1. In the Select Items list or the UWQ nodes, highlight either Marketing Lists or Marketing Lists - Manual Assignments.
The available lists appears.
2. Select the marketing list you want to use.
The window displays the list of customers to be contacted and related note history for any selected customer.
3. If you want to make a call, then select the record you want to contact and make your call.
4. Optionally, double-click the customer name to view customer information in the eBusiness Center.
5. If you want to update record information, then select one or more records. (Use Ctrl-click to select additional records.)
6. Update the records by selecting one of the following actions:
 - No Interest: The record is flagged with no interest.
 - Wrong Territory: The record is flagged as wrong territory.
 - No Contact: The record is flagged as a data issue for Marketing.
 - Bad Data - Wrong Phone Number: The record is flagged as a data issue for Marketing.
 - Duplicate Record: The record is flagged as a duplicate.
 - Create Lead: This action applies to only one record at a time. The lead is created and confirmed with the lead number. You then have the option to view the lead details in the Lead Center.

- Create Opportunity: This action applies to only one record at a time. The opportunity is created and confirmed with the opportunity number. You then have the option to view the opportunity details in the Opportunity Center.
 - New Task: Call Back
7. Enter or select related information.
 8. Optionally, enter a note.
 9. Click **Apply**.

Your changes are saved for one or more selected records. The records are marked as completed and disappear from your marketing list.

Guidelines

The UWQ can be displayed either with the work nodes listed beside the work area or in a cascading menu. Set the profile option *IEU: Desktop: UI: Work-Selector Display Style* to either h-grid or cascade. The default is cascade.

The Update region can be customized by your administrator, including adding actions to the Action drop down list. See the *Oracle Universal Work Queue User Guide* for more information.

The number of months of notes available in the recent notes section is determined by the user profile *OTS: Number or Months to view Notes and Interactions*.

If the profile option *OTS: Work Queue - Auto Launch Center* is set to Yes, then the Lead Center and Opportunity Center open automatically upon creating a new lead or opportunity.

The actions in step 6 are configurable by your administrator. See the *Oracle Universal Work Queue Implementation Guide* for more information.

9.8 Working with Personal Contact Lists

When you perform a Universal Search using Party Relationship or Person as the criteria, you save the search results as a list in the Saved Results window. This way you have created a personal contact list of your customers, which can be viewed and updated in the Universal Work Queue (UWQ). See [Section 3.6, "Creating a List"](#) for more information on how to create a list.

With the help of personal contact lists, you can easily manage your personal call lists. After you have created your personal contact lists, make calls from the lists and use the work panel in the UWQ to update the list.

Use this procedure to update your personal contact lists in the UWQ.

Steps

1. Launch the Universal Work Queue window from the Navigator.
2. Select the Work Type as **Personal List - Contacts**.

The personal contact list appears in the UWQ window.

3. If you want to update the record that you are currently working on, then select an action from the drop-down list using the work panel.

The work panel in the UWQ helps you to update the records present in your personal contact lists. You can perform various actions through the work panel, for example, you can create a note, create a lead, create an opportunity, call back the customer, request a data issue for Sales for **No Contact** or **Bad Data - Wrong Phone Number**, or duplicate a record in your personal contact list. See [Section 9.7, "Contacting Lists of Customers Supplied by Marketing"](#)

4. Click **Apply**.

The personal contact list is updated based on the action that you selected in the work panel.

9.9 Viewing Interactions

Use this procedure to view interactions your organization has had with a consumer, organization, an organizational contact, or a party who owns the selected account. Interactions track all changes to customer information and all contacts made in any of the eBusiness suite of applications between agents of your organization and the customer.

Steps

1. In the eBusiness Center, select an option in the View Details For region corresponding to the party you want to view interactions for.
2. Select the Overview tab.
3. Enter a date range in the View Interactions From and To fields. If you do not enter a date range, then the application displays the records for the number of

months set in the profile option *OTS: Number of Months to View Notes and Interactions For*.

4. Click **Display**.

The tab displays the interactions for the party for the date range you provided. The interactions are organized by date. You must open each date node by clicking on the + sign to reveal the activity for the date. (If the profile option *OTS: Display Interaction History in expanded mode* is set to Yes, then the activity also appears in the list.)

The Object field provides the unique identifier for the interaction. For example, if the interaction involved an opportunity, then the identifier represents the opportunity number.

The Handler field displays the eBusiness Suite application where the interaction occurred.

You may have to scroll over to view the User Name, the name of the user who had the interaction with the customer.

5. If you want to view the database record linked to the interaction, then double-click anywhere in the interaction. This launches the record in the eBusiness Suite application where it was created.

6. If you want to view all interactions for the party, then click **All Interactions**.

The Customer Interaction History window appears. See Interaction History documentation in *Oracle CRM Application Foundation User Guide* for details.

9.10 Viewing What Marketing Activities are Targeted to Your Customer

Customers often have a wide range of promotions targeted at them at the same time but are aware of only one. Use this procedure to view the range of marketing activities targeted to your customer.

Steps

1. In the eBusiness Center, select an option in the View Details For region corresponding to the party you want to view interactions for.
2. Select the Overview tab.
3. If no marketing activity appears in the Source Code field, enter the marketing source code associated with the call.

4. Other marketing activities are listed in the Targeted Source Codes region on the left side of the tab. If you want to view the details of any of the marketing activities in this list, then:
 - a. Select the activity.
 - b. Click **Details**.

9.11 Viewing an Organization's Products Under Service Contracts

Use this procedure to view the installed base of products under service contracts at an organization.

Prerequisites

You must display either the organization or a contact at the organization in the eBusiness Center header.

Steps

1. In the View Details For region of the eBusiness Center region, select the name of the organization.

Note: This option is unavailable if the header displays information on a consumer (the party type of Person).

2. Select the Install Base tab.

The products under a service contract appear.

9.12 Viewing Contracts a Customer Has with Your Organization

You can view contracts for a customer if you are using the Oracle Contracts applications.

Steps

1. If you want to view the contracts of a consumer, then, in the View Details For region, select the person's name.
2. If you want to view contracts for an organization, then select the name of the organization.

3. If you want to view contracts for a specific account, then select the account in the header and select the account in the View Details For region.

4. Select the Contract tab.

The tab displays the contracts in a dynamic table.

5. Select the contract category you want to view.

6. If you want to view the details of a contract, then:

a. Select the contract in the table.

b. Click **Details**.

The appropriate Oracle Contracts application opens, depending upon the type of contract.

Reference

See documentation for Oracle Core Contracts, Oracle Sales Contracts, Oracle Lease Contracts, and Oracle Service Contracts.

9.13 Viewing Accounts a Customer Has with Your Organization

Use this procedure to view information about accounts your customer has with your organization.

This information comes directly from Oracle Receivables. See Oracle Receivables documentation for an understanding of the terms and fields in this tab.

Steps

1. If you want to view the accounts of a consumer, then, in the View Details For region, select the person's name.

2. If you want to view accounts for an organization, then select the name of the organization.

3. If you want to view information about a specific account, then select the account in the header and select the account in the View Details For region.

4. Select the Account tab.

The tab displays the accounts in a dynamic table.

5. If you want to view the details of an account, then:

a. Select the account in the table.

b. Click Details.

The Customer Account Details window appears showing the various aspects of the account.

- **Credit:** Includes credit rating and grace period days
- **Billing Preferences:** Includes billing language, currency, and media
- **Roles:** Lists names and role for each name
- **Suspensions:** Includes a history of account suspensions
- **Sites:** Lists sites for the account
- **Relationships:** Lists relationships to other accounts

Guidelines

If you want to add a party to an account and provide the party with a role for that account, then see [Section 4.23, "Adding a Party to an Account"](#) and follow the procedure.

If you want to create a new account, then see [Section 4.21, "Adding an Account"](#) and follow the procedure.

9.14 Sending an E-mail to a Customer

If you have implemented Oracle Email Center you can use it to send an e-mail from Oracle TeleSales.

Prerequisites

Oracle Email Center must be implemented.

You must be assigned the Email Center role.

The profile option *OTS: Enable Email Center Integration* must be turned on.

TeleSales Agent

Navigation

Navigator > eBusiness Center

Navigator > Lead Center

Navigator > Opportunity Center

Steps

1. Display a record in the eBusiness Center, Lead Center, or Opportunity Center.
2. Click the customer's e-mail address.
The e-mail opens addressed to the customer.
3. Enter your message information.
4. Send the message.

The message is recorded as an interaction.

9.15 Using the Collection Tab

Use the Collection tab to view overdue balances, payment information, aging, and delinquent invoice information.

If you view an organization or a contact at an organization, then the delinquency information is for the organization account. In order to see delinquency information for a person, you need to view that person as a consumer, not as a contact.

Clicking **Details** launches Oracle Collections where more collection functionality is available. See the *Oracle Collections User Guide* for more information.

9.16 Creating a Quick Service Request

Use this procedure to create a service request for your customer on the Service Request tab of the eBusiness Center.

Prerequisites

Display the party in the eBusiness Center header.

Oracle Service must be implemented.

Steps

1. In the View Details For region, select the party for the service request. For example, if you are entering a service request for a consumer, then select the individual's name. If you are entering the request for an organization, then select the name of the organization.

Note: Some of the options are unavailable depending on the party displayed in the header.

2. Select the Service Request tab.
3. Enter information per the *Oracle Customer Care User Guide*.
4. If you want to open the Service Request window to enter more detail information, click **Details**.

Guidelines

The profile option *Customer Care: Service Request Form Check* determines which service request window opens when you click the Details button. The options are:

- Enter Comms Service Requests
- Enter Service Requests

Reference

See the *Oracle Customer Care User Guide* for the complete procedure.

9.17 Recording Your Interactions with a Customer

Use this procedure to start recording interactions with a customer. You can start another interaction simultaneously while the first one is open. One Center can track only one interaction at a time, but you can open multiple centers and start an interaction in each one.

Prerequisites

Display the customer in the eBusiness Center or the At A Glance window, a lead in the Lead Center, or an opportunity in the Opportunity Center.

Navigation

Navigator > eBusiness Center

Navigator > Lead Center

Navigator > Opportunity Center

Steps

1. Choose **Start Interaction** from the Tools menu or click the **Start Interaction** button on the Toolbar

Note: If the Start Interaction selection is disabled, this means that you are already recording your interaction.

Your interactions with this customer are recorded until you terminate the recording process by clicking **Wrap-Up** in the toolbar or on the Tools menu or **Next Call** in the eBusiness Center header.

Guidelines

The profile option *OTS: Interactions - Maximum multiple interactions* controls the total number of simultaneous interactions that can be tracked.

If the profile option *OTS: Interactions - Prompt for Wrapup* is set to yes, then when you start a second interaction a message appears asking if you want to wrap up the first interaction.

In the eBusiness Center, a second interaction does not start if the first party is a party relationship type and the second party queried in a new eBusiness Center is either the person or organization related to the party relationship in the first eBusiness Center.

The campaign source code must be selected prior to starting an interaction in order for the source code to be included in the interaction information.

9.18 Wrapping Up an Interaction with a Customer

Use this procedure to stop recording your interactions with a customer and to enter information about the outcome of your interactions.

Prerequisites

Display the customer in the eBusiness Center or the At A Glance window, a lead in the Lead Center, or an opportunity in the Opportunity Center.

Navigation

Navigator > eBusiness Center

Navigator > Lead Center

Navigator > Opportunity Center

Steps

1. Choose End Interaction from the Tools menu or click the Wrap-Up button on the Toolbar.

Note: If the Wrap-Up selection is disabled, this means that you are not currently recording interactions.

The Interaction Wrap Up window displays the current interaction and a list of the interactions you have had with the customer.

2. If you have more than one interaction open, then select the correct interaction from the Customer drop down list.
3. Use the Outcome List of Values (LOV) to select an outcome for the interaction.
4. Optionally, use the Result and Reason LOV to record more details about the activity.
5. Optionally, you can also record the outcomes, results, and reasons for each individual activity recorded.
6. Optionally, enter a note for the interaction.
7. If you are using Oracle Advanced Inbound or Oracle Advanced Outbound, then you can review your call statistics. (See [Section 10.8, "Viewing Call Statistics"](#) for more information.)
8. If you are using Oracle Advanced Outbound and you want to schedule a call back, then refer to [Section 10.7, "Rescheduling an Outbound Call"](#) and follow the procedure.
9. If you want to create a task, then perform the following steps:
 - a. Select **Create Task** from the Follow Up Action list.
 - b. Enter all task information.
10. Click **End Interaction** or **Next Call** when you are done.

The information you entered is saved.

Guidelines

If one interaction starts in one Center and moves to another Center (for example, it starts in eBusiness Center and moves to an Opportunity Center), then when it is ended in one Center it also ends in the other Center.

If you log on as a different user and select a different responsibility, then the interaction closes automatically.

If the interaction relates to a selected campaign source code, then the Outcome LOV contains possible outcomes for the campaign plus outcomes not associated to a campaign.

Combinations of outcome, results, and reason are set up by the Oracle Interaction Center administrator and control the options available in the LOVs. The administrator can also set up default information that appears in the wrap up window. You can accept the defaults or change the information.

If you click Next Call in the eBusiness Center header, then the interaction wraps up automatically with default information. See [Chapter 10, "Advanced Inbound and Advanced Outbound Integration"](#) for more information.

The note is related to the party in the interaction. If a lead or opportunity was created during the interaction, then the note is also related to that lead or opportunity.

9.19 Restricting Interactions

Use this procedure to restrict your organization's interactions via e-mail or phone with organizational contacts or consumers. You may want to use this procedure if a contact is away on vacation, for example, or does not want to be contacted by telephone. The restrictions you place are for information only and must be enforced by your organizational procedures.

Prerequisites

Display the organizational contact or consumer in the eBusiness Center header.

Steps

1. In the View Details For region, select the name of the person and the organization for a contact or the name of the person for a consumer.
2. Select the Person tab.
3. Click **Restrictions**.

The Restrictions window opens.

4. Enter one or more restrictions on your company's interaction with the contact. For each restriction:
 - a. Use the Restriction List of Values (LOV) to specify the type of contact you want to restrict.
 - b. Enter a period for the restriction. If you do not enter an end date, then the restriction remains in effect indefinitely.
 - c. Use the Reason LOV to enter a reason.
5. Click **OK** when you are done.

Advanced Inbound and Advanced Outbound Integration

This chapter covers the features available in Oracle TeleSales if you are also using Oracle Advanced Inbound or Oracle Advanced Outbound. Sections in this chapter include:

- [Section 10.1, "Overview of Integrating with Oracle Advanced Outbound and Oracle Advanced Inbound"](#)
- [Section 10.2, "Using Next Call and Wrapup Features"](#)
- [Section 10.3, "Taking Inbound Calls"](#)
- [Section 10.4, "Multiple Interactions on One Call"](#)
- [Section 10.5, "Transferring a Call to Another Agent"](#)
- [Section 10.6, "Handling a Call With No Interaction"](#)
- [Section 10.7, "Rescheduling an Outbound Call"](#)
- [Section 10.8, "Viewing Call Statistics"](#)

10.1 Overview of Integrating with Oracle Advanced Outbound and Oracle Advanced Inbound

When a call comes in from a customer, the customer information automatically appears for the agent taking the call. The system can match information based on any one of the following:

- ANI (automatic number ID)
- Party #
- Collateral Request #
- Event Confirmation #
- Account #
- Marketing PIN #

If no exact match is found, or if there are multiple matches such as several contacts available for the customer, then a list of possible matches appears and the agent selects the correct one.

If the Account Number has roles associated with it, then the account lookup is automatically launched and displays the owner and the roles associated with the account. The selected party and account from the lookup results is then queried in the eBusiness Center. If no roles exist for the account, then the eBusiness Center is directly launched from the incoming call and populated with the party information that owns the account.

One eBusiness Center is dedicated to media (inbound calls) only and is so labeled. You cannot perform non-media work using this eBusiness Center. The non-media eBusiness Center is used for non-media activities or to accept a second inbound call received at your direct extension, not through Advanced Inbound.

The eBusiness Center toolbar contains call-related icons. They include Next Call and a link to launch the soft phone Interaction Center controller.

In the outbound mode, an agent has the ability to seamlessly navigate between each call by automatically getting the next call in the eBC when the previous call ends. From the wrap-up window the agent can also reschedule or recycle the call back at a specified time and date into the outbound list.

One agent can transfer a call to another agent if selected. Now both agents can see the same information and discuss the record prior to the completion of the transfer.

We recommend you always auto-start interactions when you use CTI. The profile options *OTS: Interactions-Enable Automatic Start* and *OTS: Interactions-Start On Query* should be set to Yes. Always track interactions when you have CTI.

10.2 Using Next Call and Wrapup Features

The availability of the Next Call and Wrapup icons and how the Wrapup window functions depend upon your implementation and the call situation. Following are several scenarios and how the features apply in each scenario. A Solicited call is a call through the Advanced Inbound Queue that the agent requests by clicking Get Work in the UWQ. An unsolicited call is a transferred call or a call to the agent's direct extension. The profile option *OTS: Interactions-Enable Auto Wrap-Up* turns on the automatic wrapup function.

10.2.1 Scenario 1: Solicited Media, Auto Wrapup

The following table shows the details for scenario 1:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	Yes
Queue Call (solicited media)	Yes
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

Icons in eBC

Next Call: Wraps up interaction automatically with default information, ends media, unblocks UWQ, and gets next call

Wrapup: Opens the wrap up screen

Buttons in Wrapup Window

Next Call: Wraps up interaction with default outcome, ends media, and gets next call

Cancel: Cancels the wrap up and returns to previous screen

End Interaction: Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another record.

10.2.2 Scenario 2: Solicited Media, No Auto Wrapup

The following table shows the details for scenario 2:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	No
Queue Call (solicited media)	Yes
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

Icons in eBC

Wrapup: Opens the wrap up screen

Buttons in Wrapup Window

Next Call: Wraps up interaction with default outcome, ends media, and gets next call

Cancel: Cancels the wrap up and returns to previous screen

End Interaction: Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another record.

10.2.3 Scenario 3: Unsolicited Media, Auto Wrapup

The following table shows the details for scenario 3:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	Yes
Queue Call (solicited media)	No, unsolicited media

Scenario	Setting
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

Icons in eBC

Next Call: Ends media, blocks UWQ, and does not get next call. If the agent was already available for a solicited call at the time of the unsolicited call, then the agent will be set available for next call.

Wrapup: Opens the wrap up screen

Buttons in Wrapup Window

Next Call: Wraps up interaction with default outcome, ends media, blocks UWQ, and does not get next call. If the agent was already available for a solicited call at the time of the unsolicited call, then the agent will be set available for next call.

Cancel: Cancels the wrap up and returns to previous screen

End Interaction: Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another record.

10.2.4 Scenario 4: Unsolicited Media, No Auto Wrapup

The following table shows the details for scenario 4:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	No
Queue Call (solicited media)	No, unsolicited media
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

Icons in eBC

Wrapup: Opens the wrap up screen

Buttons in Wrapup Window

Next Call: Wraps up interaction with default outcome, ends media, and gets next call

Cancel: Cancels the wrap up and returns to previous screen

End Interaction: Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another record.

10.2.5 Scenario 5: Wrong Number, Solicited Media

The following table shows the details for scenario 5:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	Yes or No
Queue Call (solicited media)	Yes
Interaction started	No
Party Displayed in eBusiness Center	No (for example, wrong number)

Icons in eBC

Next Call: Ends media, unblocks UWQ, and gets next call

10.2.6 Scenario 6: Wrong Number, Unsolicited Media

The following table shows the details for scenario 6:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	Yes or No
Queue Call (solicited media)	No, unsolicited media
Interaction started	Yes
Party Displayed in eBusiness Center	No (for example, wrong number)

Icons in eBC

Next Call: Ends media, leaves UWQ blocked, and does not get next call

10.2.7 Scenario 7: No CTI

The following table shows the details for scenario 7:

Scenario	Setting
CTI Enabled	No
Auto Wrapup	Yes or No
Queue Call (solicited media)	N/A
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

Icons in eBC

Wrapup: Opens the wrap up screen

Buttons in Wrapup Window

Cancel: Cancels the wrap up and returns to previous screen

End Interaction: Saves outcome, reason, and result

10.2.8 Scenario 8: No CTI and No Party

The following table shows the details for scenario 6:

Scenario	Setting
CTI Enabled	No
Auto Wrapup	Yes or No
Queue Call (solicited media)	N/A
Interaction started	No
Party Displayed in eBusiness Center	No

Icons in eBC

None

Buttons in Wrapup Window

Not Applicable

10.3 Taking Inbound Calls

Use this procedure to start your inbound call queue and take calls.

Prerequisites

Oracle Advanced Inbound is implemented.

Login

Log in to Oracle Forms

Responsibility

TeleSales Agent

Navigation

Navigator > eBusiness Center

Steps

1. In the eBusiness Center, click the Universal Work Queue icon.

The Universal Work Queue login opens.

2. Enter your login and extension information.

The Interaction Center Controller appears.

3. Select an inbound queue.

4. Click **Get Work**.

If the inbound information for the first call matches a record exactly, then the correct customer information appears in the eBusiness Center and the interaction starts.

If the information for the first call has more than one match, then a list of possible matches appears.

5. If there is more than one match to the inbound call information, then select the correct customer from the list and click **OK**.

The customer information appears in the eBusiness Center and the interaction starts.

6. If there is no match to the inbound call information, then the eBusiness Center window opens and Universal Search appears. Search for the customer.
7. Take the call.
8. Enter appropriate information relating to the call such as notes or lead information.
9. If you want to enter interaction wrap-up information, then perform the following steps:
 - a. Click the Wrap-Up button on the toolbar.
The Interaction Wrap-up screen appears.
 - b. Enter the information.
 - c. Click **Next Call**.
10. If you want to end the interaction automatically using default values, then click the **Next Call** icon in the eBusiness Center. (The profile option *OTS: Interactions-Enable Auto Wrap-Up* must be set to Yes to be able to end an interaction automatically.)

10.4 Multiple Interactions on One Call

Use this procedure to wrap up the current interaction and query another record without ending the current call. You can query another party if for some reason two customers call in on one call, or if the initial record was the incorrect party and you need to re-query a customer record.

Prerequisites

You have taken an inbound call or placed an outbound call

Steps

1. In the eBusiness Center, click the Wrap-Up button on the toolbar.
The Interaction Wrap-up screen appears.
2. Enter the information.
3. Click **End Interaction**.

You can now query another record while remaining on the call.

10.5 Transferring a Call to Another Agent

Use this procedure to transfer a call to another agent.

Steps

1. Place the customer on hold.
2. Select the Soft Phone icon in the eBusiness Center and call the other agent using the soft phone.

The Interaction Center Work Controller appears for the second agent.

3. The second agent accepts the call.

The data transfer begins. The transfer begins while the agents speak to each other before the final click of the transfer. The agent sees the customer record information including the selected campaign.

4. Transfer the call.

Reference

Oracle Interaction Center User Guide

10.6 Handling a Call With No Interaction

Use this procedure when you do not want to record an interaction for a phone call. For example, the call is a wrong number or the caller was calling for some quick information such as directions.

Prerequisites

You have taken an inbound call from someone who was not matched in your database.

Steps

1. If partial matches appear, do not select one but instead click **Cancel**.
2. Click the Next Call icon. (The icon is active because no interaction was started.)

No interaction was started or recorded.

Guidelines

If you want to track interactions for bad calls, then you can set up a dummy customer to assign bad calls to and follow the normal Inbound scenario.

10.7 Rescheduling an Outbound Call

Use this procedure to reschedule an outbound call.

Prerequisites

You have made an outbound call

Steps

1. In the eBusiness Center, click the **Wrap-Up** button on the toolbar.
The Interaction Wrap-up screen appears.
2. For the interaction Result, choose **Call Back**.
3. In the Follow Up Action area, enter the date and time for the Reschedule.
4. Click either **End Interaction** or **Next Call** to save the interaction.

10.8 Viewing Call Statistics

The Interaction Wrap Up window displays your call statistics for either inbound or outbound calls.

Prerequisites

You are actively in inbound or outbound mode

Steps

1. In the eBusiness Center, click the **Wrap-Up** button on the toolbar.
The Interaction Wrap-up screen displays the following call statistics for either inbound or outbound, depending upon which mode you are currently in.
 - **Talk Time:** This is real time hours, minutes, and seconds for the current call. It is call time minus wrap-up time.
 - **Average Talk Time:** This is your average talk time per call. The calculation is updated when a concurrent program is run.

- **Average Wrap Up Time:** Wrap up time is the time between when the customer hangs up and when you end the interaction. Total wrap up time is divided by the number of calls taken to calculate the average. The calculation is updated when a concurrent program is run.
- **Total Calls:** This is a real time daily total number of calls you have taken for the day.

Enrolling in Events

This chapter discusses enrolling customers in events. Sections in this chapter include:

- [Section 11.1, "Overview of Events"](#)
- [Section 11.2, "Displaying an Event in the Event Tab"](#)
- [Section 11.3, "Creating an Order to Enroll Individuals in Events"](#)
- [Section 11.4, "Completing the Enrollment Process for an Order"](#)
- [Section 11.5, "Viewing Detailed Event Information"](#)
- [Section 11.6, "Viewing the Event Roster and Enrollment Status"](#)
- [Section 11.7, "Recording Attendance at an Event"](#)
- [Section 11.8, "Viewing Enrollment History and Status"](#)
- [Section 11.9, "Adjusting Enrollment by Canceling, Transferring, and Substituting"](#)

11.1 Overview of Events

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. Events can be stand alone or part of a marketing campaign. See the *Oracle Marketing User Guide* for more information about events.

When you enroll an individual in an unpaid event that has space available, you receive a confirmation number for that enrollment. If the event is full and has wait list set up and you try to enroll more people than the number of available spots, any individuals not registered are automatically wait listed. The wait list is kept on a first come first served basis. An event that is set up with no specified number of maximum registrants accepts an unlimited number of registrations.

11.2 Displaying an Event in the Event Tab

Use this procedure to display in the eBusiness Center Event tab an event that is not already in the order you are creating. If you want to display an event already in the order, then instead use the Added to Order arrow buttons at the top of the tab to navigate to it.

Navigation

Navigator > eBusiness Center > Event

Steps

1. Navigate to the Event tab.
2. If the Event tab already displays another event that was previously added to the order, then:
 - a. Place your cursor in the Source Name or Event Name fields.
 - b. Click **New** in the toolbar.
3. If you know the source name associated with the event, then use the List of Values (LOV) to enter it. Selecting a source name restricts the Event Name LOV and determines event pricing.

Note: An event can be associated with multiple source codes offering customers different discounts. If you want to explore different pricing options that may be offered by different source codes, then leave the source name field blank.

4. If you know at least a partial name of the event, then use the Event Name LOV to enter it.
5. If you do not know the event name, or want to search by some other criteria such as the date the event is being offered, then click **Search** and search for it.
Basic information about the event displays in the Select Event region of the Event tab.
6. If you want to view enrollment, availability, and other information about the event, then click **Details**.
7. You are now ready to create the order.

Reference

The Added to Order indicator at the top of the tab tells you:

- Whether the event you are viewing has been added to the order
- How many events you have in the order.

The first field tells you which event in the shopping cart you are viewing. The second field shows how many events are already in the shopping cart.

When there are no items in the order, both fields are blank:



When you are viewing an event in the Event tab and you already have added events to the order, then the first field is blank and the second field tells you how many items are already in the order.



When you are viewing an item already in the order, both fields have numbers in them. The first number is the number of the item you are viewing. The second number tells you how many items there are in the order. The following indicator image tells you that you are viewing the first event of the three in the order.



11.3 Creating an Order to Enroll Individuals in Events

Use this procedure to create an order to enroll one or more individuals in one or more events. In one order, all enrollees must have a relationship set up in the database to the party displayed in the eBusiness Center header. For business contacts, this means all must belong to the same organization.

Prerequisites

Display the party in the eBusiness Center header.

Steps

1. If you are enrolling consumers, then, In the View Details For region, select the name of the consumer.
2. If you are enrolling contacts at an organization, then, In the View Details For region, select the name of the person and the organization. If this option is unavailable, you can also enroll contacts with the organization name selected.
3. Select the Event tab.
4. The Event tab automatically displays the name of the person displayed in the eBusiness Center header as the first enrollee. If you do not want to enroll this person, then you can select a different individual, provided the organization is selected in View Details For.
5. Making an entry in the Source Code field narrows down the list of events that appears in the Event Name LOV. By leaving this field blank you can access all events regardless of source code, but you must enter at least one source code before you can complete the order. You can order events associated with multiple source codes in the same order.
6. Select the event collateral you want to send to this enrollee:
 - a. Select the Select check box next to the item you want to send.
 - b. If you are sending physical collateral you may be able to select an alternate shipping method using the Shipping Method List of Values (LOV).
 - c. If you want to send the collateral item to a different destination than the one displayed in the Send to field, then select it using the LOV.
7. For each enrollee you want to add, perform the following steps:
 - a. Use the Enrollee Name List of Values (LOV) to enter the name.
 - b. Select the check boxes for the collateral you want this enrollee to receive.

- c. If you are sending physical collateral, then you may be able to select alternate shipping methods.
8. Click **Add to Order**.
9. After you have completed adding events to your order, you must click **Review Order** to complete the enrollment and send out confirmation e-mails.

Guidelines

You can enroll multiple consumers and organizational contacts in multiple events in a single order, but all recipients must be entered in the database and have established relationships with the party displayed in the eBusiness Center header.

This means that in any single order you can only enroll contacts at the same organization or, if you are enrolling consumers, you can enroll only individuals who have established relationships with the consumer displayed in the eBusiness Center header.

For example, if John Smith calls in and wants five friends enrolled in an event, these five friends must be entered into the database first and have relationships to John Smith recorded using the Relationship tab.

If the enrollees are not in the database or you do not know who they are, then you can enroll one contact multiple times to hold spaces for the others.

If the system profile option *AMS: enable fulfillment* is set to yes, then the recipient might receive two copies of electronic collateral. In Oracle Marketing the administrator has the ability to set up confirmation letters for event registration that are fulfilled automatically upon registration. The confirmation letter is fulfilled in addition to any collateral or cover letter selected in Oracle TeleSales.

11.4 Completing the Enrollment Process for an Order

Use this procedure to confirm an order to enroll individuals in events.

Prerequisites

You must first create the enrollment order on the Event tab of the eBusiness Center.

Steps

1. In the Event tab of the eBusiness Center, click **Review Order**.

Note: If the Review Order button is disabled, this means that you have not added any events to the order.

The Event Registration Review window lists the events and enrollees for your order and their status.

2. Click **Enroll**.

The application adds the confirmation number and enrollment status to the enrollee information in the list.

11.5 Viewing Detailed Event Information

Use this procedure to view detailed information about an event such as the agenda of the event, hotel and venue information, and directions. What information you can view depends on the information entered in Oracle Marketing.

Steps

1. With the event displayed in the Event tab, click **Details**.

The Event Details window appears.

2. From the View By drop-down list, select **Information**.

The Available Event Information window displays available types of information.

3. Select the type of information you want to view to display it in the Description text box.
4. Click **OK** or **Cancel** to exit.

11.6 Viewing the Event Roster and Enrollment Status

Use this procedure to view who is enrolled for an event and the status of their enrollment.

Steps

1. With the event displayed in the Event tab, click **Details**.

The Event Details window appears.

2. From the View By drop-down list, select Roster.

The window displays the list of enrollees with enrollment status, confirmation code for each.

3. Click **OK** or **Cancel** to exit.

11.7 Recording Attendance at an Event

Use this procedure to add information about whether an enrollee attended the event.

Steps

1. With the event displayed in the Event tab, click **Details**.
The Event Details window appears.
2. Select Roster from the View By drop-down list.
3. For each event enrollee whose attendance you want to record:
 - a. Select the enrollees in the list. You can select multiple enrollees using the shift or CTRL keys on your keyboard.
 - b. In the Update Roster region at the bottom of the window, use the Attended LOV select Y (Yes) or N (No).
 - c. Using Source LOV, select who enrolled the individual.
 - d. Click **Update**.

11.8 Viewing Enrollment History and Status

Use this procedure to view the enrollment history and status for a consumer, a contact at an organization, or for all the organization as a whole.

Note: You cannot view information relating to payments for events in this release.

Navigation

Navigator > eBusiness Center > Event

Steps

1. Select the appropriate View Details For.

2. From the Navigate To menu, select **Event Registration History**.

The Registration History window displays the enrollment history for the individual or organization you selected in View Details For.

If you are viewing enrollment for a consumer, then the Customer field displays the name of the consumer and the Enrollee List of Values (LOV) contains the names of all of the individuals in the database that have an established relation with that consumer, if any.

If you are viewing enrollment history for an organization or for contacts at an organization, then the Customer field displays the name of the organization and you can use the Enrollee LOV to select any of the contacts at that organization.

3. If you want to view all of the enrollments for an organization, then make sure the Enrollee field is blank. If it is not, then clear the field by clicking **Clear Record** on the toolbar.
4. If you want to view the enrollment history for a contact at an organization, then select the contact using the Enrollee LOV.
5. If you want to view enrollment history for a consumer, then select the name of the consumer using the Enrollee LOV.
6. Click **Find**.

The window displays the enrollee history for the party you selected. Each line represents one enrollment.

The Primary Contact field displays the party which was displayed in the eBusiness Center header at the time the order was made.

7. Select the historical period you want to view using the View List drop-down list.
8. Select an enrollment line to view its status and other details in the Enrollee Information region.

An Enrollee Status of Registered means the individual is registered for the event. If the event requires payment, then the payment has been confirmed.

The Primary Contact field displays the party who made the enrollment order. The Enrollee Name displays the actual person enrolled.

9. If you want to adjust any enrollment, then:
 - a. Select the enrollment line you want to adjust.

- b. Click **Adjust Enrollment** and follow the [Section 11.9, "Adjusting Enrollment by Canceling, Transferring, and Substituting"](#) procedure.
10. Click **Cancel** when you are done reviewing event history.

11.9 Adjusting Enrollment by Canceling, Transferring, and Substituting

Use this procedure to adjust enrollment by cancelling the enrollment, transferring the enrollment to a different individual, or by substituting a different enrollee.

Note: For paid events, adjusting an enrollment by canceling, transferring or substituting does not adjust the original payment for the enrollment.

Navigation

Navigator > eBusiness Center > Event > Navigate To > Event Registration History

Steps

1. View the enrollment history for the individual whose enrollment you want to adjust.
2. In the Event Registration History window, Select the enrollment line you want to adjust.
3. Click **Adjust Enrollment**.
The Adjust Enrollment window appears.
4. If you want to cancel the enrollment, then:
 - a. Select the **Cancel** radio button.
 - b. Select a reason from the Cancellation Reason drop-down list.
5. If you want to transfer the enrollment of this individual to another event, then
 - a. Select the **Transfer** radio button.
 - b. Use the Event Name List of Values (LOV) to select an alternate event.
6. If you want to substitute a different individual as the enrollee, then:
 - a. Select the **Substitute** radio button.
 - b. Select the name of the substitute using the Enrollee Name LOV.

7. Click **OK**.

12

Sending Collateral

This chapter discusses sending marketing collateral to customers. Sections in this chapter include:

- [Section 12.1, "Overview of Sending Collateral"](#)
- [Section 12.2, "Preparing a Collateral Order for One or More Recipients"](#)
- [Section 12.3, "Modifying a Collateral Order"](#)
- [Section 12.4, "Viewing Collateral Order History and Order Status"](#)

12.1 Overview of Sending Collateral

You can use Oracle TeleSales to create an order for sending electronic or physical collateral to prospects or customers.

Electronic collateral consists of a cover letter and the electronic files of the collateral itself. Both are created within Oracle Marketing and e-mailed to customers through Oracle Fulfillment, a module of the Oracle CRM eBusiness Suite. You can choose to send the cover letter, the collateral, or both. Electronic collateral can be sent by fax, by e-mail, or to print.

Physical collateral is tracked in Oracle Inventory and shipped through Oracle Order Management. It can be created either in Oracle Marketing or in Oracle Inventory.

Electronic collateral can be grouped into kits in Oracle Marketing. When an order containing a kit is processed, all items in the kit are sent.

You cannot use Oracle TeleSales to process payment for either type of collateral you send to customers.

The order you create in the Collateral tab of the eBusiness Center is executed through an e-mail server, a fax server, or a printer in the case of electronic collateral or through the shipment of one or more inventory items. You must check the Collateral History window available from the Actions menu to see whether the collateral has actually been sent out and delivered.

Sending collateral to prospects and customers is a two-step process. You use the Collateral Tab of the eBusiness Center to create the order and then confirm it in a separate window before it can be fulfilled.

Confirming the order requests the collateral to be sent. It is up to the different fulfillment services to ensure that collateral is actually delivered.

Information about the recipients and the collateral you want to send must already be in the database. For electronic collateral, the database must have the collateral file itself.

For example, before you can create an order for prospects to receive an e-mail about a new product, your database must already contain the e-mail and the recipient information, including e-mail addresses.

12.2 Preparing a Collateral Order for One or More Recipients

You can fax or e-mail a cover letter to a customer with or without soft collateral, or print it. You can also send soft collateral without a cover letter. Hard collateral is mailed to the customer. Use this procedure to prepare an order to send cover letters

and collateral to consumers or organizational contacts related to the party in the eBusiness Center header.

While you can select multiple recipients for each piece of collateral in the order, the choice of recipients is restricted by the party you are viewing in the eBusiness Center header and the View Details For you have selected:

- If you request collateral to be sent to consumers, you can only select the consumer as the recipient.
- If you send the collateral to contacts at an organization, then you can only select recipients who are contacts at that one organization.
- If in View Details For you selected a contact, then only that contact appears as a recipient.
- If in View Details For you selected the organization, then you can choose any organization contact as the recipient.

Prerequisites

Display the party in the eBusiness Center header.

Information about the recipients and the collateral you want to send must already be in the database. For electronic collateral, the database must have the collateral Steps

1. If you are sending collateral or a cover letter to a consumer, then, in the View Details For region, select the name of the consumer.
2. If you want to send collateral or a cover letter to one or more recipients at an organization, then, in the View Details For region, select either the name of the organization or the organizational contact.

Note: You are restricted to sending collateral to one organization in any one order.

3. Select the Collateral tab if it is not already selected.
4. If you are sending electronically, then optionally select a cover letter from the Cover Letter LOV. You can send a separate cover letter with each piece of collateral or send the cover letter without collateral. A cover letter is not required.

5. Making an entry in the Source Code field narrows down the list of collateral that appears in the Collateral Name LOV. By leaving this field blank you can access all collateral regardless of source code, but you must enter at least one source code before you can complete the order. You can order collateral associated with multiple source codes in the same order.
6. If you want to send collateral, then select the collateral by performing the following steps:
 - a. If you know the source code the collateral is associated with, then select a source code using the Source Code List of Values (LOV) in the Select Collateral region of the Collateral tab.

The source code is prefilled if you made an entry in the Overview tab.

Selecting a source code restricts the number of collateral available in the Collateral Name LOV.
 - b. If you know the name of the collateral that you want to send, then use the Collateral Name LOV to select it. If you select the collateral first, the related source code appears. Only collateral with the status Final Loaded appear in the LOV.
 - c. If you do not know the collateral name you want to send, then click **Search** and search for it.

The Select Collateral region displays basic information about the collateral.
 - d. If the collateral is a kit, then Yes appears in the Kit field and you can review the items in the kit by clicking **Review Kit**.

A list of items in the kit appears.
7. Review the recipient name and optionally select a different recipient from the LOV.

Note: If the recipient is not listed in the LOV and you are viewing details for the organization, then create the contact by selecting New Contact from the Navigate To menu.

8. If you are sending physical collateral to this recipient, then enter the quantity you want to send. Your organization's preferred shipping method is filled in automatically. You can use the Shipping method LOV to select an alternate shipping method.

9. Depending on the type of shipping method you select, the individual's address appears automatically in the Sent to field. You can select an alternate destination using the Sent to LOV.

Note: If the LOV contains incorrect information or no address or e-mail appears, then you must enter the correct information on other tabs of the eBusiness Center.

10. If you are viewing details for the organization, then optionally select any additional recipients and, for physical collateral, the number of copies they are to receive.
11. Click **Add to Order**.
12. If you want to add additional items to the collateral order, then select **New** from the File menu and repeat from step 4.
13. When you complete adding collateral items, cover letters, and recipients, click **Review Order** and complete the order creation procedure by clicking **Send Request**. You must complete this last step for your order to be processed.

The collateral order is processed on a schedule set up by your organization.

You can check if the collateral order is fulfilled by choosing **Collateral History** from the Navigate To menu.

Guidelines

Quantity Available and Back Order fields in the Select Collateral region are reserved for future functionality.

After you confirm an order by clicking the Send Request button on the Collateral Request Confirmation window, you cannot modify it.

You can send collateral to multiple recipients in one order, but all recipients must be entered in the database and have established relationships with the individual displayed in the eBusiness Center header.

This means that in any single order you can only send collateral to contacts at the same organization or, if you are sending collateral to consumers, you can send collateral only to individuals who have established relationships with the consumer displayed in the eBusiness Center header.

For example, if John Smith calls in and wants five company brochures sent to five friends, these five friends must be entered into the database first and have relationships to John Smith recorded using the Relationship tab.

LOV displays collateral items and shipping methods relating to the inventory organization selected in the profile option OTS: Collateral Organization, or if none selected, the organization in the system profile option OE_ORG_ID.

12.3 Modifying a Collateral Order

Use this procedure to modify an order you have created.

Prerequisites

You must be in the process of preparing an order on the Collateral tab. You cannot modify an order once you have committed it using the Send Request button.

Steps

1. If you want to modify individual items in the order, then:
 - a. Navigate to the item you want to modify using the Added to Order arrow buttons on the Collateral tab.
 - If you want to replace this item with another, then:
 - * If you know the name of the new item, then select it using the Collateral Name LOV.

Changing the source code in the Source Code field will give you a different list of collateral to select from. Deleting any entry in the Source Code field displays all available collateral in the Collateral Name LOV. Only collateral with the statuses Final Loaded or Expired appear in the LOV.
 - * If you do not know the name, use the search function to search for it.
 - For physical collateral, you can modify the quantity you want to send to any recipient by entering a different quantity.
 - You can modify the shipping method for any recipient.
 - If you want to remove a recipient from the order, then place your cursor in the recipient's name and click **Clear Record** in the toolbar.
 - Add any additional recipients and, for physical collateral, the number of copies they are to receive.

2. Click **Update Order**.
3. When you have completed modifying the order, click **Review Order**.
4. Complete the order creation procedure by clicking **Send Request**. You must complete this last step for your order to be processed.

The collateral order is processed on a schedule set up by your organization.

You can check if the collateral order has been fulfilled by choosing Collateral History from the Navigate To menu.

12.4 Viewing Collateral Order History and Order Status

Use this procedure to view the status of individual collateral items in collateral orders that have been submitted for delivery.

Prerequisite

The concurrent program *Interaction History Bulk Process* updates the history information for collateral.

Steps

1. Choose **Collateral History** from the Navigate To menu.

The Collateral History window appears.

If you are viewing consumer collateral orders, then the Customer field displays the name of the consumer and the Recipient LOV contains the names of all of the individuals in the database that have an established relation with that consumer.

If you are viewing collateral orders for an organization or contacts at an organization, then the Customer field displays the name of the organization and the Recipient LOV allows you to select all contacts at that organization.

2. If you want to view all of the collateral orders for an organization then make sure the Recipient field is blank.
3. If you want to view collateral orders for a contact at an organization, then select the contact using the Recipient LOV.
4. If you want to view collateral orders for a consumer, then select the name of the consumer using the Recipient LOV.
5. Click **Display**.

The window displays a history of collateral orders made for the party.

Each line represents one collateral item and one recipient. This means that if you are sending the same item to five different individuals, this item appears listed five times with each recipient's name.

The Primary Contact field displays the party which was displayed in the eBusiness Center header at the time the order was made.

6. Select a collateral item to view more details about it in the Request Information region.
7. If an item has the Request Status of delivered, this means that the item was sent out to the recipient.
8. If the collateral is a kit, then Yes appears in the Kit field and you can review the items in the kit by clicking **Review Kit**.
A list of items in the kit appears.
9. Click **OK** to close the window.

This chapter describes how to create and view notes. Sections in this chapter include:

- [Section 13.1, "Overview of Using Notes"](#)
- [Section 13.2, "Viewing a Note From the Universal Search Window"](#)
- [Section 13.3, "Creating a Note From the Universal Search Window"](#)
- [Section 13.4, "Viewing Notes Using the Note Tab"](#)
- [Section 13.5, "Creating a Note In the eBusiness, Lead, or Opportunity Center"](#)
- [Section 13.6, "Creating a Task Note"](#)
- [Section 13.7, "Creating a Note During Interaction Wrap Up"](#)
- [Section 13.8, "Relating a Note to Other Objects"](#)
- [Section 13.9, "Searching for Text Within Notes"](#)

13.1 Overview of Using Notes

You can use Oracle TeleSales to keep notes on customers, contacts, accounts, opportunities, leads, tasks, and interactions. Your ability to access notes is dependent on the permissions you have to access the objects the note is related to. If you do not have access to a lead, for example, you cannot view or create a note for that lead.

When you create a note, the application automatically saves information on the creator of the note, the date and time the note was created, and the context in which it was entered. When a sales representative creates a note while working an opportunity in the Opportunity Center, for example, that note is automatically related to the opportunity and can be viewed by anyone with access to that opportunity. It cannot be viewed by anyone who does not have access to the opportunity. (The representative can also make the note private in which case it cannot be seen by anyone else.)

The note owner can relate a note to multiple objects, however, making that note available to a broader audience. For example, a sales representative writing an opportunity note about a problem the customer is having with the service department can relate that note to the customer record itself. This way everyone with access to that customer record can view that note, not only those who have access to the opportunity.

A note remains open and editable after you save it until you start working on a different record. If you want to enter a second note while you are still working in the same record, then you must have your cursor in the New Note text box and click the New button on the toolbar.

You can search for text within notes by displaying the list of the notes that you want to search, right-clicking in the list, and selecting Find from the pop-up window.

13.2 Viewing a Note From the Universal Search Window

Use this procedure to view notes for an object using the Universal Search window. An object can be a consumer (party of Person), an organization (party of Organization), a business contact (party of Relationship), a lead, or an opportunity.

Navigation

Navigator > Universal Search

Steps

1. Search for the object using the Universal Search window.
2. Select the object in the list.
3. Click **View Notes**.

The View Notes window appears listing notes for the time period set in the profile option *OTS: Number of Months to View Notes and Interactions For*.

Because they appear in a dynamic table, you can sort the notes by any of the columns.

4. If you want to change the date range of notes displayed, then:
 - a. Enter the date range in the View Notes From and To fields.
 - b. Click **Display**.

A new list of notes appears for the date range you selected.
5. To view a note you can place your cursor over the Note field in the list, or you can select the note in the list to display the text.
6. If you want to view the full text of all of the notes in a continuous list, then:
 - a. Click **All Notes**.

The first page of notes appears in the All Notes window.
 - b. Click **Next** to display more notes.

13.3 Creating a Note From the Universal Search Window

Use this procedure to create a note for an object from the Universal Search window. An object can be a consumer (party of Person), an organization (party of Organization), a business contact (party of Relationship), a lead, or an opportunity.

Steps

1. Search for the object using the Universal Search window.
2. Select the object in the list.
3. Click **View Notes**.

The View Notes window appears.
4. Click **New**.

5. Enter the note in the Note text box.
6. If you want to make this note viewable by everyone in the organization who has permission to access the object, then make sure the Public check box is selected.
7. If you want to make this note private and therefore invisible to others in your organization, then deselect the Public check box and select the Private check box.
8. Click **Save** on the toolbar.

The note is automatically linked to the object you are viewing and contains information about the note creator and date and time the note was created.

If you want the note to be visible from other objects within Oracle TeleSales, then you must relate the note to those objects. See [Section 13.8, "Relating a Note to Other Objects"](#) for more details.

9. If you want to create a second note, then:
 - a. Place your cursor in the Note text box again.
 - b. Click **New** in the toolbar. This is the button with a green plus sign.
 - c. Enter the note and click **Save**.

13.4 Viewing Notes Using the Note Tab

Use this procedure to view notes on the Note tab in the eBusiness Center, the Lead Center, or the Opportunity Center.

Prerequisites

You must have view access to the object the note is related to. To view a note on a lead, for example, you must have access to that lead.

If you are using the eBusiness Center, then you must display a party in the eBusiness Center header and select an option in the View Details For region corresponding to the party you want to enter notes for.

Navigation

Navigator > eBusiness Center

Navigator > Opportunity Center

Navigator > Lead Center

Steps

1. Select the Note tab.

The Note tab lists notes for the number of months set in the profile option *OTS: Number of Months to View Notes and Interactions For* for that object type in a dynamic table.

2. If you want to change the date range of notes displayed, then:

- a. Enter the date range in the View from and To fields.
- b. Click **Display**.

A new list of notes appears for the date range you selected.

3. To view a note you can place your cursor over the Note field in the list, or you can select the note in the list to display the text on the right.

4. If you want to view the full text of all of the notes in a continuous list, then:

- a. Click **All Notes**.

The first page of notes appears in the Notes Summary window.

- b. Click **Next** to display more notes.

13.5 Creating a Note In the eBusiness, Lead, or Opportunity Center

Use this procedure to create a note in the eBusiness Center, Lead Center, or Opportunity Center.

Prerequisites

Display a party in the eBusiness Center header and select an option in the View Details For region corresponding to the party or account you want to enter notes for.

Display a lead in the Lead Center.

Display an opportunity in the Opportunity Center.

Steps

1. Navigate to notes in one of the following ways:

- In the eBusiness Center, select the Note tab.
- In the Opportunity Center, select the Note tab.

- In the Lead Center, select the Note tab.
 - On the Lead tab of the eBusiness Center, click **View Note**.
 - On the Opportunity tab of the eBusiness Center, click **View Note**.
2. Click **New**.
 3. Enter the note in the Note text box.
 4. If you want to make this note viewable by everyone in the organization who has permission to access the object, then set the status to **Public**.
 5. If you want to make this note private and therefore invisible to others in your organization, then select **Private** for status.
 6. Click **Save** on the toolbar.

The note is automatically linked to the object you are viewing and contains information about the note creator and date and time the note was created.

If you want the note to be visible from other objects within Oracle TeleSales, then you must relate the note to those objects. See [Section 13.8, "Relating a Note to Other Objects"](#) for more details.

7. If you want to create a second note, then:
 - a. Place your cursor in the New Note text box.
 - b. Click **New** in the toolbar.
 - c. Enter the note.
 - d. Click **Save**.

Guidelines

The note you create is automatically linked to the object where you create it:

- If you are viewing a lead in the Lead Center or the Lead tab of the eBusiness Center, then the note is linked to that lead.
- If you are viewing an opportunity in the Opportunity Center, then the note is linked to that opportunity.
- If you are viewing a contact at an organization in the eBusiness Center, then the note is related to both the party type of relationship and the party type of Organization.

- If you are viewing a consumer, then the note is linked to that individual. In the Related to field, the term used is *Person* because in the customer model this is the party of Person.
- If you choose to View Details For the account in the eBusiness Center, then the note is linked to the account and the party who owns the account is added as a Related To value.
- If you choose to View Details For the owner of an account that is selected in the header, and if the profile option *OTS: Relate Account to Tasks and Notes* is set to Yes, then the note is linked to the account owner and the account is added as a Related To value.

13.6 Creating a Task Note

Use this procedure to create a note for a task.

Prerequisites

You must display a party in the eBusiness Center header and select an option in the View Details For region corresponding to the party or account you want to enter notes for.

Steps

1. Select the Task tab in the eBusiness Center.
2. Enter or select a task.
3. Click **Task Notes**.

The Notes for Task Manager window opens.

4. Enter the note in the Note text box.
5. If you want to make this note viewable by everyone in the organization who has permission to access the object, then set the status to **Public**.
6. If you want to make this note private and therefore invisible to others in your organization, then select **Private** for Status.
7. Click **Save** on the toolbar.

The note is automatically linked to the task you are viewing and contains information about the note creator and date and time the note was created.

If you want the note to be visible from other objects within Oracle TeleSales, then you must relate the note to those objects. See [Section 13.8, "Relating a Note to Other Objects"](#) for more details.

8. If you want to create a second note, then:
 - a. Place your cursor in the New Note text box.
 - b. Click **New**.
 - c. Enter the note.
 - d. Click **Save**.

13.7 Creating a Note During Interaction Wrap Up

Use this procedure to create a note while wrapping up an interaction.

Prerequisites

The Interaction Wrap Up window is open (see [Section 9.18, "Wrapping Up an Interaction with a Customer"](#)).

Navigation

Navigator > eBusiness Center > Wrap Up

Navigator > Lead Center > Wrap Up

Navigator > Opportunity Center > Wrap Up

Steps

1. Enter the note in the Note text box.
2. Click either **End Interaction** or **Next Call**.

The interaction wrap up information and your note are saved.

Guidelines

The note is related to the party in the interaction and the interaction itself.

13.8 Relating a Note to Other Objects

Creating a note relates that note to the object where you created it. For example, a note you create on the Note tab of the Lead Center is automatically linked to the lead you are viewing. Use this procedure to relate the note to additional objects.

Prerequisites

You must display the note you want to relate to other objects in any Note tab or in the View Notes window.

Navigation

Navigator > eBusiness Center > Note

Navigator > Lead Center > Note

Navigator > Opportunity Center > Note

Navigator > Universal Search > View Notes

Steps

1. On the Note tab or in the View Notes window, click **Related to**.
The Related to window appears.
2. Use the Related to LOV to select the type of object you want to relate the note to.
3. Use the Name LOV to select the object.
 - When the type you select is Relationship, then the Name LOV contains a list of other contacts at the organization, or, for consumers, persons with a relationship to the consumer displayed in the eBusiness Center. The names are a concatenation of the contact first and last name and the organizational name, if any.
 - When the type you select is Organization, then the Name LOV contains the names of any organizations that have an established relationship with the organization or person.
 - When the type you select is Opportunity, then the Name LOV contains the names of the opportunities for the organization or consumer. The name is a free text description of the opportunity entered in the Opportunity Name field concatenated with the opportunity number.

- When the type you select is Lead, then the Name LOV contains all the lead names for the organization or person. The lead name is the free text description of the opportunity entered in the Lead Name field.
4. If you want to relate the note to another object, then repeat the above procedure.
 5. Click **OK**.

13.9 Searching for Text Within Notes

Use this procedure to find text in notes listed in a table.

Prerequisites

You can only perform this procedure within any table listing notes, such as the Notes table in the Overview tab of the eBusiness Center or the listing of notes in the Notes window.

Steps

1. Right-click any cell in the table.
2. Select **Find in Table** from the pop-up menu.
3. Type the characters you want to search on into the text field.
4. Indicate whether or not to match case, and select the direction of the search, backward or forward.
5. Click **Find**.

The application highlights the record containing the first instance of your search term.

6. You can click **Cancel** to stop a long running search.

14

Using Tasks

This chapter describes how to create, view, and assign tasks. Sections in this chapter include:

- [Section 14.1, "Overview of Using Tasks"](#)
- [Section 14.2, "Viewing Tasks for a Party"](#)
- [Section 14.3, "Creating a Task for a Party or an Account"](#)
- [Section 14.4, "Creating a Task During Interaction Wrap Up"](#)
- [Section 14.5, "Creating a Task Using a Template"](#)
- [Section 14.6, "Assigning Tasks for an Opportunity"](#)
- [Section 14.7, "Viewing Tasks Associated with an Opportunity"](#)

14.1 Overview of Using Tasks

Use the Task tab of the eBusiness Center to view and assign tasks pertaining to individual consumers, organizations, accounts, and organizational contacts.

A task you create here appears in the work queue of the individual you assign as the owner of the task.

Where you create a task determines how a task is categorized in the work queue. If you want to assign a task for a lead, then create the task in the Lead Center. Use the Opportunity Center to create tasks related to opportunities.

The task tab is divided into two regions. The left side presents the list of existing tasks you can view in the region to the right.

You can sort the list of tasks in the list by any column and can restrict the list to displaying only private tasks by selecting the Private check box. Selecting the Display All check box displays closed tasks in addition to open tasks.

You can use the right side of the tab to view the details of an existing task you have selected in the list or to enter a new task. To create a new task you must first click the New button.

14.2 Viewing Tasks for a Party

Use this procedure to view all of the tasks assigned to agents regarding a consumer, an organization, an account, or an organizational contact. If you want to view tasks assigned to you, then use the Universal Work Queue instead.

Prerequisites

Display the party related to the task in the eBusiness Center header.

Steps

1. In the View Details For region, select the name of the consumer, organization, contact, or account.
2. Select the Task tab.
3. The tasks associated with the party are listed on the left.
4. Select the Display All check box to list both open and closed tasks.
5. If you want to view only private tasks, then select the Private check box.
6. Select a task on the list to view its details on the right.

7. If you want to see notes for a task, then click **Task Notes**.
8. If you want to see further details, then click **Details**.

The details of the task appear in the Task window. See the *Oracle CRM Application Foundation User Guide* for information on how to use the task manager.

Guidelines

The system and personal profile option *OTS: Task Details-Query Task By* controls the tasks displayed in the tab. If it is set to Source, then the tab displays all tasks created for the party. If it is set to Reference, then the tab displays every task that is related to the party.

14.3 Creating a Task for a Party or an Account

Use this procedure to create a task for a consumer, an organization, an account, or an organizational contact. The task you create appears in the work queue of the individual you assign as the owner of the task.

If you want to assign a task for an opportunity or a lead, then create the task in the Lead or Opportunity tabs instead. Where you create a task determines how a task is categorized in the work queue.

Prerequisites

Display the party you want to create a task for in the eBusiness Center header.

Steps

1. In the View Details For region, select the name of the consumer, organization, contact, or account.
2. In the Task tab, click **New**.
3. Use the Lists of Values (LOVs) to enter the task type and priority.
4. Enter a name for the task in the Name field.
5. Enter a status.
6. Choose a date type.
7. Optionally, enter dates in the Start and End fields.
8. Select an owner type.

9. In Owner, use the LOV to enter the person who owns this task.
10. To assign the task to one or more resources, perform the following steps:
 - a. Click the ellipsis button beside the Assignee field.

The Task Assignment window displays the owner as the first assignment.
 - b. Select a resource type from the LOV.
 - c. Select the resource from the LOV.
 - d. Use the LOV to change the status of the task.
 - e. If you want the task to appear in the resource's calendar, select Show on Calendar.
 - f. Click **OK**.

Assignees cannot be removed once committed.
11. Enter a description.
12. If you want to enter notes for the task, then click **Task Notes** and enter the note.
13. If you want the task viewable only by you, then select **Private**.
14. Click **Save** on the toolbar to save the task.

The task appears in My Owned Tasks in Universal Work Queue for the person assigned as the owner of the task. It appears in My Assigned Tasks for each person added as an assignee. The last assigned assignee appears on the tab as Assignee. The task appears in the calendar for each assignee who has Show on Calendar selected.

Guidelines

If the profile *OTS: Relate Account to Tasks and Notes* is set to Yes, then the account will be added as Related To the task.

The profile option *OTS: Default Task Date Type* determines the default Date Type value.

The profile option *Client Timezone* determines the default value for Timezone.

The profile option *Task Manager: Default Task Status* determines the default task status.

Contacts cannot be added to a task after it is created.

14.4 Creating a Task During Interaction Wrap Up

Use this procedure to add a task during an interaction wrap up. See [Section 9.18, "Wrapping Up an Interaction with a Customer"](#) for more information about wrapping up interactions.

Prerequisites

The Interaction Wrap Up window is open.

Navigation

Navigator > eBusiness Center > Wrap Up

Navigator > Lead Center > Wrap Up

Navigator > Opportunity Center > Wrap Up

Steps

1. Select **Create Task** from the Follow Up Action list.
2. Enter a name for the task.
3. Use the LOV to select a task type.
4. Enter a start date.
5. Optionally enter an end date.
6. Use the LOV to select an owner type.
7. In Owner, use the LOV to enter the person who owns this task.
8. Use the LOV to select an assignee type.
9. Select an assignee for the task.
10. Enter a description of the task.
11. Click either **End Interaction** or **Next Call**.

The interaction wrap up information and your new task are saved.

14.5 Creating a Task Using a Template

You can create tasks using a template in the eBusiness Center, Opportunity Center, and Lead Center. The task is created for the party, account, opportunity, or lead.

Prerequisites

Display the party you want to create a task for in the eBusiness Center header.

Select the account for the party in the eBusiness Center header.

Select the opportunity in the Opportunity tab of the eBusiness Center or display it in the Opportunity Center.

Select the lead in the Lead tab of the eBusiness Center or display it in the Lead Center.

Templates and template groups must exist. They are created by your administrator. See *Oracle Applications Foundation User Guide* for more information.

Steps

1. If you want to create a task for a party or account, then select one of the following in the eBusiness Center:
 - a. If you want to create a task for a consumer, then in the View Details For region select the name of the consumer.
 - b. If you want to create a task for an organization, then in the View Details For region select the name of the organization.
 - c. If you want to create a task for a contact at an organization, then in the View Details For region, select the names of the contact and the organization.
 - d. If you want to create a task relating to an account, then, in the View Details For region select the account.
2. From the Actions menu choose Create Task from Template.

The Create Tasks from Template Group window displays Collections Account, Party, Opportunity, or Lead as the source document and the Source Value field displays the selected View Details For, account, opportunity, or lead.
3. Use the LOVs to select a template group.
4. Use the LOV to select an owner type. The LOV displays resources.
5. In Owner, use the LOV to enter the person who is being assigned this task.
6. Click **Create Tasks**.

The task is created and available for viewing and editing.

14.6 Assigning Tasks for an Opportunity

Use this procedure to assign a task for an existing opportunity. The task you assign here appears on the work queue of the individual you enter as the owner of the task. This task also remains visible in this task tab. All members of the sales team can view, create, and edit tasks.

Prerequisites

The opportunity must be created first.

Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Task tab.
3. Click **New**.
4. Use the LOVs to enter the task type and priority.
5. Enter a name.
6. Enter a date when you want this task to be performed in the Start field.
7. In Owner, use the LOV to enter the person who owns this task.
8. Enter a description.
9. If you want the task viewable only by you, then select **Private**.
10. If you want the assignees notified about the task, then select **Notify**.
11. If you want to relate the task to other objects, then perform the following steps:
 - a. Click **Related To**.

The Related To window displays relationships to the opportunity number and the party displayed in the header.
 - b. Select an object type.

- c. Select the name to relate to the task.
- d. Optionally, enter a description of the task.
- e. Click **OK**.

The Related To window closes.

12. Click **Save** on the toolbar to save your task.

14.7 Viewing Tasks Associated with an Opportunity

Use this procedure to view tasks associated with an opportunity.

Prerequisites

The opportunity must be created first.

Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

Steps

1. Display the opportunity in the Opportunity Center.
2. Select the Task tab.
The tasks associated with this opportunity are listed on the left.
3. If you want to see both open and closed tasks, then select **Display All**.
4. If you want to view only private tasks, then select **Private**.
5. Select a task on the list to view the details on the tab.
6. If you want to see further details, then click **Details**.

The details of the task are displayed in the Task window. See the *Oracle CRM Application Foundation User Guide* for information on how to use the task manager.

Customizing with Preferences

This appendix explains how you can customize the application using User Preferences.

A.1 Customizing Your Application with Personal Preferences

You can set different system profile options to change the behavior of your application.

You can:

- Change the order of items in your Work Queue
- Change different aspects of the user interface such as which values are defaulted in a particular field.

Use this procedure to set up your personal profiles.

Prerequisites

None

Steps

1. Navigate to **Profile User Values**.
The Personal Profile Values window appears.
2. Click **Find** in the toolbar. This is the button with the search light.
The Profiles search window appears.
3. Enter a partial name of the profile you want to set. Use the percent sign to substitute for any missing characters. For example, searching for OTS% brings up all of the TeleSales profiles.

4. Click Find.

The Profiles window displays the profiles that meet your search criteria.

5. Double-click the profile you want to set.

The profile displays in the Personal Profile Values window.

6. Set the value of the profile by making a selection using the User Value List of Values (LOV).

A.2 Changing the Order of Items in Your Work Queue.

If you want to change the order of work queue items you can set the following profiles to a sequence of numbers that reflect the order in which you want them to be presented.

For example, if you assign IEU: Queue Order: Myteam Leads to 1 and IEU: Queue Order: MyTeam Opportunities to 2, then all the leads with you on the sales team are listed first in the Universal Work Queue under the heading My Leads (Sales Team). All of your opportunities are listed second under the heading My Opportunities (Sales Team).

The following profiles determine the order the item appears on the work queue. Set these profiles to the sequence you want to view items in your work queue:

Profile	Work Queue Item
IEU: Queue Order: Blended	
IEU: Queue Order: Forecasts	
IEU: Queue Order: Inbound Email	
IEU: Queue Order: Inbound Telephony	
IEU: Queue Order: Leads	My Leads (Owner): All leads you own.
IEU: Queue Order: Marketing Lists - Manual Assignments	Marketing Lists
IEU: Queue Order: Media Nodes	
IEU: Queue Order: My Tasks	
IEU: Queue Order: My Team Leads	My Leads (Sales Team)
IEU: Queue Order: My Team Opportunities	My Opportunities (Sales Team)

Profile	Work Queue Item
IEU: Queue Order: MyWork	
IEU: Queue Order: Opportunities	My Opportunities (Sales Credits)
IEU: Queue Order: Outbound Telephony	
IEU: Queue Order: Personal List: Contacts	Personal List - Opportunities
IEU: Queue Order: Personal List: Opportunities	Personal List - Contacts
IEU: Queue Order: Quotes	
IEU: Queue Order: Service Requests	
IEU: Queue Order: Tasks	
IEU: Queue Order: Web Collaboration	

A.3 Other Personal Profiles

The following table lists the personal profiles you can set to change the behavior of different aspects of the interface and gives their description.

Profile	Description
IEU: Blending Style	Determines the Interaction Blending style for a user (forced, non-blended).
IEU: Desktop: Network: Proxy Port	Specifies the port of the proxy server to use for desktop communications.
IEU: Desktop: Network: Proxy Server	Specifies the IP address or DNS name of the proxy server to use for desktop communications.
IEU: Desktop: Network: Use Proxy	Determines whether the desktop network layer attempts to use the system's proxy server, or a direct connection.
IEU: Desktop: UI: Refresh Style	Determines the refresh style for the UWQ selector UI.

Profile	Description
IEU: Desktop: UI: Show All Nodes	Showing all nodes enhances speed of logon and refresh, but causes all possible nodes to be displayed (for example, all task types are displayed for tasks).
IEU: Media: Email	Determines if a user can use Email services.
IEU: Media: Telephony	Determines whether the user is able to use Telephony services.
IEU: Non-Media: Navigate	Set to Yes to tell UWQ to reuse the same application window when you select a new work item. Set to No if you want UWQ to open a new additional window when you select a new work item. Set to Yes to save your computer resources.
IEU: Optional: Phone Extension	If specified, avoids user entering phone extension during UWQ logon.
IEU: QResType: MyWork	Determines the type of work to show in MyWork (based on resource).
IEU: Queue: Defects	Determines if a user can work on Defects in UWQ.
IEU: Queue: Enhancements	Determines if a user can work on Enhancements in UWQ.
IEU: Queue: Forecasts	Determines if a user can work on Forecasts in UWQ.
IEU: Queue: Inbound Email	Determines if user can work on inbound e-mail in UWQ.
IEU: Queue: Inbound Telephony	Determines if a user can work on Inbound Telephony queues in UWQ.
IEU: Queue: Leads	Set to Yes to allow the user to work on leads that belong to him as the owner. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.
IEU: Queue: Marketing Lists - Manual Assignments	Determines if a user can work on Marketing Lists - Manual Assignments in UWQ.
IEU: Queue: My Team Opportunities	Set to Yes to allow the user to work on opportunities that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.

Profile	Description
IEU: Queue: My Tasks	Determines if a user can work on My Tasks in UWQ.
IEU: Queue: My Team Leads	Set to Yes to allow the user to work on leads that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No.
IEU: Queue: MyWork	Determines if a user can see the MyWork queue in UWQ.
IEU: Queue: Opportunities	Determines if a user can work on Opportunities in UWQ.
IEU: Queue: Outbound Telephony	Determines if a user can work on Outbound Telephony queues in UWQ.
IEU: Queue: Personal List: Contacts	Determines if a user can work on an contacts personal list. Default is Yes at all levels.
IEU: Queue: Personal List: Opportunities	Determines if a user can work on an opportunities personal list. Default is Yes at all levels.
IEU: Queue: Quotes	Determines if a user can work on Quotes in UWQ.
IEU: Queue: Service Requests	Determines if an user can work on Service Requests in UWQ.
IEU: Queue: Tasks	Determines if a user can work on Tasks in UWQ.
IEU: Queue: Web Callback	Determines if a user can work on Web Callback queues in UWQ.
IEU: Queue: Web Collaboration	Determines if a user can work on Web Collaboration queues in UWQ.
IEU: Queue Order: Blended	Determines the order of appearance for the queue.
IEU: Queue Order: Forecasts	Determines the order of appearance for the queue.
IEU: Queue Order: Inbound Email	Determines the order of appearance for the queue.
IEU: Queue Order: Inbound Telephony	Determines the order of appearance for the queue.

Profile	Description
IEU: Queue Order: Leads	Determines the order of appearance for the queue.
IEU: Queue Order: Marketing Lists - Manual Assignments	Determines the order of appearance for the queue.
IEU: Queue Order: Media Nodes	Determines the order of appearance for the queue.
IEU: Queue Order: My Tasks	Determines the order of appearance for the queue.
IEU: Queue Order: My Team Leads	Determines the order of appearance for the queue.
IEU: Queue Order: My Team Opportunities	Determines the order of appearance for the queue.
IEU: Queue Order: MyWork	Determines the order of appearance for the queue.
IEU: Queue Order: Opportunities	Determines the order of appearance for the queue.
IEU: Queue Order: Outbound Telephony	Determines the order of appearance for the queue.
IEU: Queue Order: Quotes	Determines the order of appearance for the queue.
IEU: Queue Order: Service Requests	Determines the order of appearance for the queue.
IEU: Queue Order: Tasks	Determines the order of appearance for the queue.
IEU: Queue Order: Web Collaboration	Determines the order of appearance for the queue.
OTS: Customer - Display Inactive Records For Party List Of Values	Set to Yes to include inactive records in the party LOV
OTS: Customer - Include Address Style In Concatenated Format	Set to Yes to have the address style name (example US) at the beginning of the address field before the concatenated address.
OTS: Default Collateral Reply To Email Address	Email address you want to default as the Reply to address for any electronic collateral you send out

Profile	Description
OTS: Default Collateral Subject Line	Default subject line for the collateral you send through the eBusiness center
OTS: Default Country	The default country when you enter a new address
OTS: Default Cover Letter for Collateral Requests.	The default cover letter (email) you want to send out with electronic collateral
OTS: Default Event Reply to Email Address	The default Reply to address for Event Confirmation emails
OTS: Default Event Subject Line	The default subject line for Event Confirmation emails
OTS: Default Note Type	The default Note Type used for a new Note
OTS: Default Party Type	The Default Party Type for a new customer entry
OTS: Default Person Title	The default title for a person you enter
OTS: Default Phone Line Type	To default the phone line type
OTS: Default Relationship	The default relationship between parties
OTS: Default Shipping Method for Electronic collateral	The default shipping method for electronic collateral
OTS: Default Shipping Method for Physical collateral	The default shipping method for physical collateral.
OTS: Default Tab in eBusiness Center	The tab which appears on top when you first open the eBusiness Center
OTS: Default Tab in Opportunity Center	The tab which appears on top when you first open the Opportunity Center
OTS: Default Tab in Sales Lead Center	The tab which appears on top when you first open the Sales Lead Center
OTS: Default Task Date Type	Sets the default date type in the Task tab of the eBusiness Center.
OTS: Default Universal Search Tab	The tab which appears on top when you first open the Universal Search window
OTS: Default Universal Search Type	The default type of search in the Universal Search window
OTS: Default User Role	To default role assigned to you when you open up any of the center windows.

Profile	Description
OTS: Default User Group	Choose the Default User Role profile option before changing this option. To default sales group assigned to you when you open up any of the center windows. This profile is important only if you are a member of multiple sales groups. The profile option OTS: Default User Role must be set and you must exit and re-enter the System Profile Values window before setting the OTS: Default User Group profile.
OTS: Marketing List All Campaigns	Setting this profile to "No" displays only your own lists in Universal Work Queue. A setting of "Yes" displays all lists in Universal Work Queue.
OTS: Number of Days Prior to View	Sets the default number of days for a lead or opportunity
OTS: Number of Months to View Notes and Interactions for	Default value for months of notes and interactions to view
OTS: Opportunity History Expanded Display	Set to Yes to display the Opportunity History log with all nodes expanded. Set to No to display in collapsed format.
OTS: Order History - Default value for the Filter	Sets the Order tab default filter. Options are Order Status, Order Type, Order Source, or null.
OTS: Order History - Number of months to Display Orders	Determines the default from, to date range for the Order tab in the eBusiness Center. It is the number of months before the current date. Default is 12.
OTS: Script Language	Select the language to be used for scripts. If profile is not set, then the language is AMERICAN.
OTS: Script Launch on Interaction	When the system profile OTS: Scripting Installation is set to Yes, setting this profile to Yes enables automatic script launching on start of an interaction. Setting this profile to No disables automatic script launching on start of an interaction. When this profile is not set, it is handled the same as No.

Profile	Description
OTS: Script Launch on UWQ Delivery	When the system profile OTS: Scripting Installation is set to Yes and the profile OTS: Script Launch on Interaction is set to Yes, setting this profile to Yes enables automatic script launching on UWQ delivery. Setting this profile to No disables automatic script launching on UWQ delivery. When this profile is not set, it is handled the same as No.
OTS: Show All Lists	Setting this profile to "No" displays only your own lists in Universal Search. A setting of "Yes" displays all lists in Universal Search.
OTS: Show Campaign and Offer Names instead of Codes	A setting of Yes displays campaign schedule and offer names in the Source Code field instead of the campaign schedule code and offer code.
OTS: Task Details-Query Task By	Set to Source to display tasks in the eBusiness Center based on the origin of the task. Set to Reference to display any tasks related to the customer.
OTS: URL Web Collaborate Start Page	Enter the URL that is the start page when a you start a new net meeting
OTS: URL to display a map of the address	Enter a URL to display a map of the address in the Address Tab of eBusiness Center
OTS: Use Primary Address to Create Lead in UWQ	Set to Yes to use the primary address when creating a lead.
OTS: Use Primary Address to Create Opportunity in UWQ	Set to Yes to use the primary address when creating an opportunity.
OTS: UWQ - auto launch lead and oppty center	Set to Yes to open Lead Center and Opportunity Center when a new lead or opportunity is created in UWQ.
OTS: UWQ Default Source Code	This sets the default Source Code used when you receive a call via Oracle Advanced Inbound.
OTS: UWQ - Display Source Code and Name for Opportunity Nodes	Controls the display for opportunities in the UWQ. Options are None, Source Code Only, and Source Code and Name.

Glossary

ANI

Automatic Number Identification

custom fields

Also known as flexfields. Custom fields are available on most screens. A flexfield must be set up by the system administrator, include a custom label for the field, and indicate what type of data is allowed in the field. A key flexfield is indexed, and a search may be conducted against it or data may be sorted by the field in a report.

DNIS

Dialed Number Identification Service

descriptive flexfield

A field you use to collect information unique to your business. You determine the additional information you need and descriptive flexfield lets you customize your application to your needs without additional programming.

event

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. Events are created in Oracle Marketing.

lead

A potential to sell products and services to an account or contact. Leads record the initial interest a customer or prospect has in making a purchase or in evaluating a product for purchase. One contact can generate many leads. One marketing activity can generate many leads. Qualified leads become opportunities.

line item

Individual products and services part of an order.

opportunity

A qualified sales opportunity with the potential to bring in revenue. An opportunity has a life span and it eventually closes either because it turns into a sale, is lost to a competitor, or is a bad opportunity. An opportunity is assigned to one or more territories based on a variety of criteria and may be worked on by a single sales representative, by a team of employees, or by a sales partner.

party

The customer model used by Oracle TeleSales treats any relationships you enter between individuals and organizations as a separate party in the database. For example, when the user creates a new record for Jim Jones, CEO of Acme Corp. the application creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

qualified lead

A lead becomes qualified when it appears likely to lead to a sale. Leads can be set to "qualified" by a sales representative, or automatically, if the information in a lead meets criteria preset by the application administrator. For example, a lead can become qualified automatically as soon as a telemarketer makes entries in the Time Frame, Budget, and Budget Status fields.

quote

A quote is a list of items and prices presented to a prospect. It is created by a sales representative when a contact, agreement, price list, and ship to site have been specified.

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