

Oracle® Field Sales

User Guide

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Oracle Field Sales User Guide, Release 11i

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Glossary

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Oracle Field Sales User Guide, Release 11*i*

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Preface

Welcome to the Oracle Field Sales User Guide, Release 11*i*.

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

- The principles and customary practices of your business area.
- Oracle Field Sales
- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

This guide contains the information you need to understand and use Oracle Field Sales.

- Chapter 1 is an introduction to Oracle Field Sales. This chapter covers the main concepts underlying the functionality in the application, the key features, and integrations.
- Chapter 2 is an overview of setting up user profiles and preferences.
- Chapter 3 includes information about searching for information using Quick Find and Advanced Search.
- Chapter 4 covers the home page. It includes information on setting up and editing bins, charts, and reports, and using the lookup tools.
- Chapter 5 is an overview of the Calendar tab. Information covered in this chapter includes, calendar profiles and views.
- Chapter 6 describes the leads functionality.
- Chapter 7 includes information about handling opportunities. Topics include: creating, copying, and closing opportunities. You can also manage information for sales teams, leads, competitors, win/loss tracking, sales credits, notes, tasks, and attachments.
- Chapter 8 references the Oracle Quoting User Guide for information. Quoting is an integrated function. Detailed information is located in the Oracle HTML Quoting User Guide.
- Chapter 9 includes information about forecasting. Topics include: creating and submitting worksheets, viewing forecast history, and linking to compensation. You can also manage information for notes and attachments.
- Chapter 10 describes the functionality available from the Customer tab. Topics include organizations, people, contacts, and contact lists.
- Chapter 11 includes information about using Sales Teams.
- Chapter 12 describes the 360 degree view.
- Chapter 13 includes information about Accounts.
- Chapter 14 describes using Notes, Tasks, and Attachments.
- Chapter 15 includes information about using Interactions.

- Chapter 16 references the Oracle Proposals User Guide for information. Proposals is an integrated function.
- Chapter 17 references the Oracle Partners Online User Guide for information on using partners.
- Chapter 18 references the Oracle Incentive Compensation User Guide for information about using compensation with Oracle Field Sales.
- Chapter 19 includes information about using Fulfillment with Oracle Field Sales. This integration provides users with the ability to send collateral (email) to customers.
- Chapter 20 includes information for system administrators to manage administrative set ups and tasks for the application.

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Accessibility of Code Examples in Documentation

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

Other Information Sources

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

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).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

Oracle Field Sales 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 Field Sales.

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

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

Guides 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). 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.

Guides Related to This Product

Oracle Receivables User Guide

Use this user guide to learn how to implement flexible address formats for different countries. You can use flexible address formats in the suppliers, customers, banks, invoices, and payments windows in both Oracle Payables and Oracle Receivables. This user guide also explains how to set up your system, create transactions, and run reports in Oracle Receivables.

Oracle Receivables Tax Manual

This manual provides information about calculating tax within Oracle Receivables, Oracle Order Management, Oracle Sales and Marketing, and Oracle Web Customers. It includes information about implementation procedures, setup forms and windows, the Oracle Receivables tax calculation process, tax reports and listings, and tax-specific open interfaces.

Oracle *interMedia* User's Guide and Reference

This user guide and reference provides information about Oracle *interMedia*. This product enables Oracle⁹ⁱ to store, manage, and retrieve geographic location information, images, audio, video, or other heterogeneous media data in an integrated fashion with other enterprise information. Oracle Trading Community Architecture Data Quality Management uses *interMedia* indexes to facilitate search and matching.

Oracle Self-Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self-Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Oracle Inventory User Guide

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

Oracle Marketing User Guide

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

Oracle Marketing Encyclopedia User Guide

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

Oracle Incentive Compensation User Guide

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

Oracle Incentive Compensation Implementation Guide

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

Oracle Partners Online User Guide

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

Oracle Partners Online Implementation Guide

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

Oracle Common Application Components User Guide

This guide contains information on setting up and using Oracle Common Application Components.

Oracle Quoting Implementation Guide

This manual describes how to implement Oracle Quoting.

Oracle HTML Quoting User Guide

This manual contains information on using Oracle HTML Quoting.

Oracle Sales Online Technical Reference Manual

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

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 and the Oracle 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 guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

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 Field Sales implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide 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 Oracle *Metalink*

Oracle Applications Message Manual

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

Oracle Common Application Components Implementation Guide

Many CRM products use components from Oracle Common Application Components. Use this guide to correctly implement Oracle Common Application Components.

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

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Oracle offers a complete set of training courses to help you and your staff master Oracle Field Sales and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 structure, terminology, and data as examples in a customized training session delivered at your own facility.

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From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Field Sales 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 Oracle server, and your hardware and software environment.

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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.

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Thank you for using Oracle Field Sales and this user guide.

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Introduction to Oracle Field Sales

This chapter discusses the key concepts, features, and integrations of Oracle Field Sales.

Topics included are:

- [Section 1.1, "Overview of Oracle Field Sales"](#)
- [Section 1.2, "Oracle Field Sales Key Features"](#)
- [Section 1.3, "Oracle Field Sales Integrations"](#)
- [Section 1.4, "What's New"](#)
- [Section 1.5, "What's Obsolete"](#)

1.1 Overview of Oracle Field Sales

Oracle Sales applications automate business processes across all sales and customer interaction channels to improve efficiencies and reduce lengthy selling cycles. From Lead to Order, Oracle Field Sales improves the ability of global sales organizations to plan, manage, and execute sales processes to close more sales opportunities and achieve sales objectives. Oracle Field Sales is integrated with Oracle TeleSales, Oracle Marketing, Oracle Partners Online, Oracle Quoting, Oracle Proposals, and Oracle Incentive Compensation. Oracle Field Sales is an HTML based application for field sales representatives, sales managers, and sales executives that provides a complete set of tools to manage the entire sales cycle, for more efficient and profitable sales. Oracle Field Sales uses the Trading Community Architecture (TCA) customer model. TCA enables this application to support complex relationships which further allows users to provide exceptional service to customers.

1.1.1 Oracle Field Sales Key Concepts

Traditional Sales vs. e-Business Sales Model

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

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

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

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

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

Trading Community Architecture

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

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

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

TCA Parties

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

Because all business entities are treated equally, the customer model can easily handle B2B, B2C or mixed business models. Although the model tracks different attributes for people than for organizations (e.g., for people, date of birth, title and gender; and for organizations, SIC code, and fiscal year end), both people and organizations are parties and therefore stored in the same manner. This means that the same sorts of business relationship which can be formed with an organization can be formed just as easily with a person.

TCA Party Types

Person

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

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

Organization

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

Party Relationship

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

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

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

Business Relationships

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

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

Personal Relationships

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

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

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

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

Person-Organization Relationships

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

Example: John employee of Oracle (person-organization)

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

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

Organization-Organization Relationships

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

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

Sales Methodologies

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

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

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

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

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

Elements of a Sales Methodology

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

1.2 Oracle Field Sales Key Features

Oracle Field Sales includes the following features:

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

Customer and Contact Management

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

Also includes:

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

Opportunity Management

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

Also includes:

- Tracking of deal size, sales stage, win percentage, and projected closing date
- Tracking of obstacles, competitors, and decision factors
- Support for sales methods
- Sharing of opportunities across sales channels
- Pipeline management
- Generation of new quotes from opportunities
- Win/loss analysis

Lead Management

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

Also includes:

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

Personal Productivity

- Scheduling and calendar features
- Quick and expanded searches
- In box indicators of changed or new data elements
- Collateral fulfillment via email or fax

- Territory look up tool to find sales reps given territory properties

Personalization

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

Also includes:

- Ability to personalize tables across applications to view only relevant information
- Ability to specify a default tab or subtab
- Saved searches for easy access to data
- "My reports"
- Configurable home page

Self Service Administration

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

Also includes:

- Broadcast messages on the home page
- Configurable menus
- Maintenance of sales resources
- Setup tools for useful links on home page
- Ability for a System Administrator to publish saved searches and personalized tables to all users.

Information Out (Analytics)

- Bins, charts, and reports displayed on the home page
- Sales metrics for managers and executives available on home page bins
- Win/loss analysis (win/loss ratio by competitors product categories)
- Pipeline analysis (open and won opportunities by channel/campaign)
- Forecast analysis (forecast submissions by subordinates)

- Forecast reports (forecast progression to track how forecast has changed within a period)
- Top customer chart (revenue per customer)

Forecast Management

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

Quote and Order Management

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

1.3 Oracle Field Sales Integrations

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

Oracle TeleSales

Designed for inside sales professionals, whether inbound telesales or outbound telemarketing agents. Manages the entire sales cycle from prospecting to booking the order.

Oracle Marketing Online

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

Oracle Sales Intelligence

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

Oracle Proposals

Provides the ability to create custom proposals to prospective clients.

Oracle Incentive Compensation

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

Sales Force Planning: Quota Planning and Distribution

As part of Oracle Incentive Compensations, salespeople can approve their compensation plans online through integration with Sales Force Planning. Sales managers and executives can plan and distribute quotas to different sales groups and/or professionals through an HTML interface.

Oracle Partner Relationship Management

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

Oracle Territory Manager

Oracle Field Sales takes advantage of the enhanced Territory Management module to assign accounts (customers), opportunities and leads to salespeople. Administrators define flexible territories where qualifiers can be defined using any attribute related to the customers, leads, and/or opportunities.

Oracle Receivables

Provides tax information and customer account information. Refer to the *Oracle Receivables User Guide* for complete information.

Oracle Order Management

Allows creation of orders from quotes. Refer to the *Oracle Order Management User Guide* for complete information.

Oracle Inventory

Provides inventory information. Refer to the *Oracle Inventory User Guide* for complete information.

Oracle Advanced Pricing

Allows set up of price lists, discounts, adjustments, and promotions. Refer to the *Oracle Pricing User Guide* for complete information.

Oracle Configurator

Provides the ability to configure model items. Refer to the *Oracle Configurator Installation Guide* and *Oracle Configurator Implementation Guide* for complete information.

Oracle Installed Base

Provides information about a customer's installed base of products.

Oracle Resource Manager

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

Fulfillment

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

Oracle iStore

Enables easy creation, management and personalization of powerful Web-based stores in a secure and personalized environment.

1.4 What's New

This topic describes functionality to be delivered in the Oracle Field Sales 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 Oracle *Metalink* for relevant product patches and documentation.

The following features are new to Oracle Field Sales in this release.

Sales Campaign Schedules

Sales campaigns are created in Oracle Marketing. Sales managers can create campaigns for cross-selling or upselling into their existing territories to create new leads. The leads generated from these campaigns are then tracked in Oracle Field Sales in the same manner as any other leads. Ideally, these leads will be converted to opportunities.

Business Events

System Administrators subscribe users to receive business events notification which are delivered through custom workflows.

Proposals

Sales representatives can create proposals directly from an opportunity. Opportunity data is automatically passed into the proposal. The proposal is then delivered through email or by printing the proposal and sending it through the mail.

Common Product Catalog

In the past, product categories were limited to interest type, primary, and secondary codes. Using the common product catalog, multiple levels of product categories are possible based on implementation needs. This allows for more accurate reporting.

Diagnostics

Administrators are able to get basic diagnostics to detect set up issues. These diagnostics are provided through scripts. They fall into the following categories: Patches, Security, Opportunity, Forecasting, Personalized searches and reports, TeleSales, and Resources.

Data Quality Management

Smart Search and Fuzzy Search are used to provide a way to identify duplicate objects such as customers or opportunities. This functionality is set up during implementation by setting up match rules and transformation rules.

Administrator Personalization Enhancement

A System Administrator can create saved searches and publish them for application users at the site and responsibility levels. At the site level, the saved search is available to all application users. At the responsibility level, a user with a specific responsibility can use the saved search.

Lead Interactions Available

Interactions are customer contacts associated with business events such as event registration, survey completion, or a web visit. Each business event is associated with a default score that reflects the significance of the interaction. These interactions are evaluated through a "mining engine" to determine if potential sales opportunities exist. Interactions are then linked, or created as leads, for follow up if interest is determined as sales ready. A mining engine provides linking rules for managing these interactions. These rules are used to determine how interactions are evaluated to generate leads.

Source Systems Management

Oracle Trading Community Architecture can now contain data from multiple sources including legacy or third party systems and maintain references to the information in the source. You can search for the records within TCA using reference information to other source systems.

Lead Status Change

The lead status "Converted to Opportunity" is now considered a "Closed" lead status. This change affects the seeded searches and any other customized search that includes lead status as a parameter.

1.5 What's Obsolete

The following profiles in Oracle Field Sales are obsolete:

- OSO: Relationship Original System Reference URL
- OSO: Person Original System Reference URL
- OSO: Organization Original System Reference URL
- OS: Relationship Original System Reference URL
- OS: Person Original System Reference URL
- OS: Organization Original System Reference URL
- OSO: Store Opportunities After Aggregation Due to Forecast Threshold
- OSO: Opportunity Worksheet Threshold Amount
- OTS: Enable Address Validation (replaced by OS: Enable Address Validation)
- OSO: Enable Lead Share
- OSO: Lead Share Application ID
- OSO: Lead Share Company Code
- OSO: Lead Share Default Org Text
- OSO: Lead Share Host Name
- OSO: Lead Share LETS Server
- OSO: Lead Share Partner ID
- OSO: Lead Share Port Number
- OSO: Lead Share Proxy Host
- OSO: Lead Share Proxy Port
- OSO: Lead Share Responsibility ID
- OSO: Lead Share Salesforce ID
- OSO: Lead Share User ID
- OSO: Use Product Category LOV
- OS: Auto-relate lead note to Customer
- OS: Auto-relate lead note to Primary Contact

- OS: Inventory Category Integration
- OS: Territory Minimum Number of Records for Parallel Processing
- OS: Territory Number of Child Processes
- OS: Territory Records to Open for Processing Changed Accounts

The following concurrent programs are obsolete:

- Create Interest Codes from Inventory Category sets and Categories
- Load Interest Types and Codes to Inventory Categories
- Opportunity Exchange-Get Opportunities
- Opportunity Exchange-Put Opportunities
- Refresh Materialized View for Forecast Reports

Setting User Profiles and Preferences

This topic group covers the personalization and preferences that you can set while using Oracle Field Sales. Setting up your preferences is an important step in using the application since many of the features and functions are governed by profiles and preferences.

Topics included are:

- [Section 2.1, "Setting User Profiles"](#)
- [Section 2.2, "Changing Your Password"](#)
- [Section 2.3, "Navigation and Display Preferences"](#)

2.1 Setting User Profiles

This section explains which profiles are customizable by each user. The profiles that you select in this section affect the application at the User level only. Each profile includes a default value, if you decide not to customize the profile, this default value is used. Oracle Field Sales provides this customization to create a more efficient application for users.

In addition to user level profiles, there are profiles that are set by the System Administrator. For a basic understanding of how profiles are treated in the application, the following paragraph outlines the hierarchy of profile levels.

Oracle Applications treat user profile levels as a hierarchy, where User is the highest level of the hierarchy, followed by Responsibility, Application, and at the lowest level, Site. A typical user cannot change system profiles at the Responsibility, Application, or Site levels.

Profile Categories

This section covers the following profile categories:

- [Section 2.1.1, "Setting General Profiles"](#)
- [Section 2.1.2, "Setting Home Page Profiles"](#)
- [Section 2.1.3, "Setting Lead Profiles"](#)
- [Section 2.1.4, "Setting Opportunity Profiles"](#)
- [Section 2.1.5, "Setting Forecast Profiles"](#)
- [Section 2.1.6, "Setting Customer Profiles"](#)
- [Section 2.1.7, "Setting Compensation Profiles"](#)
- [Section 2.1.8, "Setting Contact List Profiles"](#)

2.1.1 Setting General Profiles

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

Navigation

Profiles > Field Sales > General

Setting defaults allow users to enter information about opportunities and customers quickly.

Default Country: The default country you select is used throughout the application while creating leads, opportunities, and customers.

Default Role: This is the role assigned through the Resource Manager. It also indicates whether your role is a sales group member, manager or administrator. You may have one or many roles. This role controls both the opportunities you can view, and the group role for forecasting. When you have multiple roles, it is important to recognize which one is your current role. If you have more than one role, the role you select here will appear as the default.

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

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

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

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

Enable Instruction Text: Enabling this feature turns on the instruction throughout the application.

2.1.2 Setting Home Page Profiles

Customize the home page to display data bins, charts, reports, and graphs. Data is derived from opportunities, customers, leads, and forecasting information.

Home page preferences are categorized into four sections:

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

Navigation

Profiles > Field Sales > Home Page

Adding new rows allows you to add bins, charts, reports, and graphs.

Narrow Bin Preferences: Available bins include Top Performers, New Leads, Win Loss Ratio, My Favorites, Open Opportunities, Won Opportunities, My Forecast, Opportunity Status, System Counts, Corporate Open Opportunities, Corporate Won Opportunity and My Offered Opportunities.

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

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

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

Chart Preferences: You can select and configure the Charts of your choice from a drop-down list to display on your personal home page.

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

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

2.1.3 Setting Lead Profiles

Lead profiles affect user preferences for lead management.

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

Navigation

Profiles > Field Sales > Leads

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

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

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

Default Budget Status: Budget status indicates the progress of the customer's budget e.g. is it pending or already approved.

Default Timeframe: Timeframe indicates when the lead is likely to close.

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

2.1.4 Setting Opportunity Profiles

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

Navigation

Profiles > Field Sales > Opportunity

Default Sales Stage: The stages used in a sales cycle.

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

Default Status: The current status of an opportunity, showing whether the deal is won, lost, open or dead.

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

Default Channel: The method of receiving an opportunity. Choose from the drop-down list.

Default Sales Methodology: A predefined set of guidelines and tasks to assist sales people through the sales cycle. The methodology selected will automatically create a set of tasks assigned to the sales person creating/modifying the opportunity. Setting a value for this profile, overrides the value you selected for default sales stage.

Default Response Code: Describes how the opportunity is received. Examples include via web, email, phone.

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

Personalized Searches: The list of saved searches created, including the seeded searches. You can remove or delete your personalized searches and select which search is to be used as your default summary page. These searches are included in the Search drop-down list on the summary page. Remove saved searches by selecting the Remove check box. Seeded searches and searches created and published by a system administrator cannot be removed or deleted.

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

2.1.5 Setting Forecast Profiles

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

Navigation

Profiles > Field Sales > Forecasting

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

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

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

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

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

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

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

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

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

- Best case = Opportunity amount
- Forecast = Opportunity amount

- Worst Case = Opportunity amount

Win probability 60-79:

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

Win probability 40-59:

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

Win probability 0-39:

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

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

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

Display Subordinate Current Pipeline Values: You can display subordinate current pipeline values on the summary page by selecting the check box. This will display a total of your subordinate's current pipeline values.

- This option is only available to those with a manager role.
- Not selecting the check box may improve application performance.

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

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

Use the Aggregation table to Get the Pipeline on the Forecast Main Page: This feature can be used to increase the performance of the forecast page. Aggregate tables contain a snapshot of the pipeline values vs. accumulating current values from the opportunities. A message indicates 'Aggregation tables were refreshed on <date & time>'. Note, this option is only available to those with a manager role. If you select this option you will not be using real time data. Rather, the aggregated data is refreshed on a pre-determined schedule, set in the forecast profile options, based on business requirements. You will see a message indicating when the aggregation tables were last refreshed.

2.1.6 Setting Customer Profiles

Navigation

Profiles > Field Sales > Customer

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

Default Organization Phone Type: This is the kind of phone for the organization, such as mobile, voice mail or general.

Default Person Phone Type: This is the kind of phone for the organization, such as mobile, voice mail or general.

Default Customer Category: This is a way of grouping customers into standard categories. This is usually an company defined list of categories.

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

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

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

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

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

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

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

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

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

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

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

The seeded searches, "My Organizations", "My People", and "My Person Relationships", and the searches published by the system administrator cannot be deleted or removed.

2.1.7 Setting Compensation Profiles

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

Refer to the *Oracle Incentive Compensation User Guide* for information about using the compensation functionality.

Navigation

Profiles > Field Sales > Compensation

Steps

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

2.1.8 Setting Contact List Profiles

Navigation

Profiles > Field Sales > Contact List

Steps

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

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

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

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

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

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

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

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

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

2.2 Changing Your Password

For information about changing your password, refer to the *Oracle Applications CRM System Administrator's Guide*.

Navigation

Profile > Account Setting > Change Password

- Your password must be at least six characters long.
- You can use numbers and letters.
- You cannot update your user name.

2.3 Navigation and Display Preferences

General personal preferences are determined by the default values set by the system administrator. The following section gives a brief summary of each available item.

Switching Current Responsibility

Switching responsibilities will give you access to additional functionality. For example, if you are a Sales Representative but you also have managerial duties, you will have a Sales Representative responsibility and a Sales Manager responsibility. The Sales Manager responsibility will have access to their subordinate's forecasts and access to the customers and opportunities for their subordinates.

Setting Default Responsibility

The responsibility that you designate as your default responsibility will be used whenever you log in to the application.

Language

Change the language with which the user interface labels are displayed.

User Currency

This is the transaction currency used when creating leads and opportunities. For existing leads or opportunities, this also controls the user currency displayed on the detail pages. If the user currency is different than the transaction currency, the transaction currency is converted and displayed in the User Amount field.

Select the desired user currency by choosing from the drop-down list in the User Currency field. If the user currency is different than the opportunity currency, both

amounts will be displayed on the Opportunity Summary page using daily conversion rates.

Date Format

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

Display Style

Choose the display style that you would like to use. Display style changes the look of the application, such as color.

Display Rows per Page

This is the number of rows of data to display in a summary page before selecting another page of data. Displaying a higher number of rows may adversely affect the performance of the application.

Display Blank Rows per Table

This is the number of blank lines to display in tables allowing data to be entered. Displaying a higher number of rows may adversely affect the performance of the application.

Search Display

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

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

For more information about navigation and display preferences, refer to the *Oracle Applications CRM System Administrator's Guide*.

This chapter contains information on performing searches using Oracle Field Sales. Quick Find is a single field search tool used for basic searches. Advanced Searching includes a multi-field search used for more complex search requests, Smart Search, and Fuzzy Find Searches.

Topics included are:

- [Section 3.1, "Quick Find"](#)
- [Section 3.2, "Advanced Searches"](#)
- [Section 3.3, "Personalization"](#)
- [Section 3.4, "Saved Searches"](#)

3.1 Quick Find

Use Quick Find for basic searches. For example, search for an opportunity by the opportunity name.

You can use the Fuzzy Find feature, a search that uses transformation rules established during implementation to help find objects, by clicking the radio button.

Steps

1. In the Quick Find section, choose the item for which you are searching from the drop-down list.

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

- Email: matches the email address for organizations, people and contacts
- Opportunity: matches the opportunity name
- Check Owner: matches the opportunity owner
- Organization: matches the organization name
- Person: matches the person's last name
- Contact: matches the person's last name and they are defined as a contact
- Lead: matches the lead name
- Company Research: links to the Hoover's Inc., company research database
- Appointment: matches the appointment name
- Task: matches the task name
- Notes: matches the note name

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

2. Click **Go**.

Guidelines

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

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

3.2 Advanced Searches

Oracle Field Sales uses the Data Quality Management tools set up during implementation for making the most of your searching capabilities. Searching includes:

- **Advanced Search:** Advanced Search is a parameter driven detailed search related to the active tab. For an advanced search, you can save the search criteria, organize the displayed information in columns, define the sort criteria, perform a "smart search", and use the search on a default summary page. Use advanced search for more complex searches and smart search to ensure that duplicates are not being created.
- **Smart Search:** Search based on Data Quality Management tools. Smart search offers a dynamic user interface, which is based on match rules. The Smart Search dynamic user interface shows the attributes used in the match rule as search fields.
- **Fuzzy Find:** Fuzzy find refers to a search that uses transformation rules established during implementation.

Prerequisites

If you want to use the functionality provided by Smart Search searching rules, set up during implementation, then the profile *HZ: Enable DQM Party Search* must be set to Yes by your System Administrator.

3.2.1 Advanced Search

Steps

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

The Advanced Search page opens.

Advanced Searches are available for the Customer, Partner, Lead, and Opportunity tabs.

2. Select search filters and display options.

Note: If you are searching by DUNS number and the DUNS number is alpha-numeric, then the number must be entered in upper case letters only.

Note: Disabled product categories are shown in reports and advanced search enabling you to search and report on existing transaction data even if product categories are disabled.

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

Example of Advanced Search

You are trying to locate all customers, of party type person, who have an active status and live within your territory.

1. Navigate to the Person subtab.
2. Click **Advanced Search**.
3. Select the Active radio button for Person Status.
4. Select the United States from the Country drop-down list.
5. Enter California in the State field.
6. To display the Address and Email Address, move the items from the Available columns to the Display columns using the right arrow buttons.
7. Name the search, "Active People in My Territory".
8. Click **Search**.

3.2.2 Smart Search

Smart Search uses matching rules to identify potential duplicates. Matching rules are established by the System Administrator during implementation.

Smart Search is available for the Organization, Person, or Contacts only.

Steps

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

The Advanced Search page opens.

2. Click the **Smart Search** link.
3. Depending upon the match rules established during implementation, the page will display the available parameters. These parameters are driven by the object you are searching, Organization, Person, or Contact.
4. Click **Search**.

Example of Smart Search

1. Select the Customer tab.
2. Click the **Organization** subtab.
3. Click **Advanced Search**.
4. Click **Smart Search**.

The Organization Smart Search page opens.

5. Select the organization parameters.
6. Click **Search**.

3.3 Personalization

The three parts of personalization are: saved searches, home page personalization, and table personalization.

- Personalized searches allow you to save search criteria, column display preferences, and sort criteria for use on summary default pages.
- Home page personalization, see [Section 4.2, "Setting Up Bins, Charts, and Reports"](#) on page 4-7.
- Table personalization: An example of table personalization is included in this section, see [Section 3.5, "Table Personalization"](#). For personalizing tables for forecasting and customers, information is located within each chapter.

Example of Saved Search Personalization

You want to create a personalized opportunity search to display on your opportunity summary default page. This is the first page you will see when you click the opportunity tab in Oracle Field Sales.

Steps

1. Click **Personalize**.

The Opportunity Search page opens.

2. You want to display all the opportunities that you have access to, that are in Sales Stage 1.
3. You select the Sales Stage 1.
4. Name the search, "My Opportunities in Sales Stage 1".
5. Check the box, Use as Summary Page Default.
6. Click **Save and Apply Search**.

Information About the "Include Account Manager Privilege" Box

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

If a sales representative is an account manager for an organization, then he/she has access to all opportunities created for that organization. The "Include Account Manager Privilege" box is important if the person performing the advanced search

is either an account manager OR if someone in their sales hierarchy has the "account manager" privilege assigned to them.

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

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

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

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

3.4 Saved Searches

Saved searches are created through the Advanced Search page. They are customized according to your preferences and can be saved for use at a later time.

Additionally, System Administrators can create saved searches for publication to users through the Administration tab. They can also view these published reports and remove or modify them from the Saved Search Report Administration pages for the related module.

Note: If a System Administrator disables a search, it is not available to application users. Seeded searches cannot be deleted from the list of available searches and may be enabled by a System Administrator at any time.

3.4.1 Seeded Saved Searches

The seeded saved searches are:

- My Leads (Owner): This search displays all leads for which you are the owner.
- My Leads (Sales Team): This search displays all leads for which you are on the sales team.
- My Open Oppties (Owner): This search displays all *open* opportunities for which you are the owner.
- My Open Oppties (Sales Credit): This search displays all *open* opportunities for which you are receiving sales credit.
- My Open Oppties (Sales Team): This search displays all *open* opportunities for which you are on the sales team.
- My Oppties (Owner): This search displays all opportunities for which you are the owner.
- My Oppties (Sales Credit): This search displays all opportunities for which you are receiving sales credit.
- My Oppties (Sales Team): This search displays all opportunities for which you are on the sales team.
- My Organizations (Sales Team): This search displays all organizations for which you are on the sales team.
- My Contacts (Access): This search displays all contacts for which you have access.

- My People (Sales Team): This search displays all people for which you are on the sales team.

3.4.2 Seeded Reports

The seeded reports are:

- My Opportunity Summary
- Opportunity Summary Report

3.5 Table Personalization

The tables provided for keeping track of entities such as purchase items and competitors are personalizable. The currently displayed columns are listed on the right and the available columns are listed on the left.

Steps

To change the elements of the table, follow these steps.

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

Home Page

The Home subtab is a customizable page that can provide information about leads, opportunities, forecasts, and customers in the form of bins, charts, and reports.

Topics included are:

- [Section 4.1, "Home Page Overview"](#)
- [Section 4.2, "Setting Up Bins, Charts, and Reports"](#)
- [Section 4.3, "Editing Bins, Charts, or Reports"](#)
- [Section 4.4, "Using Internal Tools"](#)
- [Section 4.5, "Using External Tools"](#)

4.1 Home Page Overview

From the home page you can customize information that is of particular interest to you by adding and editing bins, charts, and reports. Additionally, the home page is integrated with other products to provide a place to view news, links to other web sites, marketing information, and tools.

Topics included are:

- [Section 4.1.1, "Tools"](#)
- [Section 4.1.2, "Marketing"](#)
- [Section 4.1.3, "News"](#)
- [Section 4.1.4, "Encyclopedia"](#)
- [Section 4.1.5, "Resources"](#)
- [Section 4.1.6, "Sales Reports"](#)

4.1.1 Tools

The Tools subtab provides Internal Tools, such as territory lookup and events. This subtab also includes External Tools, which are links to related applications outside of Oracle Field Sales.

4.1.2 Marketing

The Marketing subtab is a portal to Marketing items such as campaigns, events, collateral, products, and pricing.

Refer to the *Oracle Marketing Encyclopedia User Guide* for information.

4.1.3 News

The News subtab can be customized to provide news information. Set up is done through user profiles. Navigate to Profiles > Sales Online > Home Page > News Preferences.

4.1.4 Encyclopedia

The Encyclopedia subtab is set up using Oracle Marketing Encyclopedia System. It is a repository of sales and marketing information such as product collateral and sales kits.

Refer to the *Oracle Marketing Encyclopedia System User Guide* for information.

4.1.5 Resources

Search for Resource information using the Resources subtab.

Refer to the *Oracle Common Application Components User Guide* for information.

4.1.6 Sales Reports

The Reports subtab lists all available charts and reports.

- **Lead Import Status Report** — This report provides the status of the Lead Import.
- **New Leads Generated via Lead Import** — This report provides new leads generated via lead import.
- **New Customer Data Generated via Lead Import** — This report provides new customer data generated via lead import.
- **Leads** — This chart gives the sales person the ability to graph new leads.
- **Opportunity Summary Report** — This report provides a detailed list of the opportunities with amounts for each product category.
- **Opportunity Group Summary Report** — This report provides a summary of all opportunities by the sales group.
- **Opportunity Detail Report** — This report provides a detailed listing of the selected opportunities.
- **Opportunity Access Report** — This report provides a list of opportunities with Partners and is based on Sales Team access.

- **Opportunity Progression Dashboard** — This report provides a list of tasks for each opportunity by sales methodology.
- **Opportunity Classification Report** — This report provides a list of opportunities by opportunity classification, allowing you to view a summary of opportunities in each classification group.
- **Opportunity Aging Report** — This report allows you to analyze aging trends for opportunities meeting your criteria, including Days to Close and Days Past Close.
- **Opportunity Aging by Status Report** — This report displays aging trends for opportunities based on days in each status, allowing you to determine which opportunities are not progressing as expected.
- **Opportunity by Products Report** — This report provides a list of opportunities based on Product categories and/or Products that are part of these opportunities.
- **Opportunity by Status** — This chart gives the ability to graph the opportunities by status.
- **Opportunity by Win Probability** — This chart gives the ability to graph the open opportunities by win probability.
- **Opportunity by Close Date** — This chart gives the ability to graph the open opportunities by close date.
- **Forecast History Report** — This report shows submitted pipeline and forecast values for the sales people selected. A hyperlink is available to drill down to the submitted opportunity or product category worksheet.
- **Forecast Comparison Report** — This report compares submitted pipeline and forecast values for the sales people selected. A hyperlink is available to drill down to the submitted opportunity or product category worksheet.
- **Forecast Summary Report By Product Category** — The Forecast Summary Report By Product Category allows the user to return a listing of opportunities included in the forecast matching specified criteria.
- **Forecast Accuracy** — This report provides the historical accuracy of the forecast values for the specified period and sales group/person.
- **Forecast to Pipeline Summary** — This report provides management a way to compare the current period pipeline with a comparison period and generate conversion ratios.

- **Forecast Summary** — This report provides management with the summary of the current forecast in comparison to a particular base period.
- **Forecast Progression** — This report provides the progression of submitted forecasts between the specified dates and for the sales group/person.
- **Forecast History - Self** — This chart gives the ability to graph the submitted forecast numbers for a sales person.
- **Forecast History - Subordinates** — This chart gives the sales manager the ability to graph the submitted forecast numbers for his/her subordinate sales reps or groups.
- **Customer Classification Report** — This report will return all parties within the chosen party type that meet the classification criteria chosen.
- **Task Classification Report** — This report will return all parties within the chosen party type and tasks associated with those parties that meet the classification criteria chosen.

4.1.7 Business Intelligence Reports

The following are Business Intelligence Reports:

- **Customer Overview** — Customer Overview.
- **Customer Activation Analysis** — Customer Activation Analysis by Customer Category.
- **Customer Acquisition Analysis** — Customer Acquisition Analysis by Customer Category.
- **Customer Costs Analysis** — Customer Costs Analysis by Customer Category.
- **Customer Lifecycle Analysis** — Customer Lifecycle Analysis Distribution and Trend.
- **Customer Loyalty Analysis** — Customer Loyalty Analysis by Customer Category.
- **Customer Product Gross Margin Analysis** — Customer Product Gross Margin Analysis by Customer Category.
- **Customer Retention Analysis** — Customer Retention Analysis by Customer Category.
- **Customer Revenue Analysis by Customer Category** — Customer Revenue Analysis by Customer Category.
- **Customer Revenue Analysis by Market Segment** — Customer Revenue Analysis by Market Segment.
- **Customer Revenue Analysis by Operating Unit** — Customer Revenue Analysis by Operating Unit.
- **Customer Revenue Analysis by Geography - State** — Customer Revenue Analysis by Geography - State.
- **Customer Revenue Analysis by Dimension** — Customer Revenue Analysis by Dimension.
- **Customer Revenue - Year over Year** — Customer Revenue - Year over Year.

The following is a Customer Chart:

- **Top Customers** — This chart gives the sales person the ability to graph the lifetime value of his/her top customers

4.2 Setting Up Bins, Charts, and Reports

Setting up bins, charts, and reports can assist you in summarizing the status of important sales information. For example, to view all opportunities closing within the next 30 days, you can set up a bin to reflect those numbers on your home page.

Navigation

Profiles > Field Sales > Home Page

Steps

To customize your home page with bins, charts, and reports with additional items, follow these steps:

1. Click **Add New Rows**.

This will add a row to the table so that you can add a bin, chart, or report.

2. Select the Bin Number from the drop-down list.

This will indicate the order in which the bins appear on the home page.

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

3. Click **Update**.

The next time you view your home page, the new bin, chart, or report is displayed.

4.2.1 Seeded Bins

The application is seeded with default bins, charts, and reports for your home page.

The seeded bins are:

- **Won Opportunities:** This bin shows all opportunities where the Open flag is set to No and the win/loss indicator is set to Won within the period or parameters indicated.
- **Opportunity Status:** This bin is a list of seeded reports regarding opportunities that are included in this bin which users can run.
- **Open Opportunities:** This bin shows all opportunities where the Open flag is set to Yes within the period or parameters indicated.

- **My Forecasts:** This bin provides a list of all forecast numbers that have been submitted per period by a sales person.
- **My Favorites:** This bin provides ability to bookmark application pages, saved reports, saved searches or free URLs (Universal Resource Locator) so that they are available to be run from home page.
- **New Leads:** This bin provides a count and amount of leads assigned to the user per period rolling up to a sales person.
- **Win Loss Ratio:** This bin provides a count of won opportunities, losses, and the ratio per period rolling up to a sales person. Loss analysis is an effective tool used by management to measure the sales effectiveness of the organization. The percentage data is based on the total opportunity amounts.

4.2.2 Seeded Charts

The seeded charts are:

- **Forecast History - Self:** This chart gives the ability to graph the submitted forecast numbers for a sales person.
- **Opportunity by Status:** This chart gives the ability to graph the opportunities by status.
- **Top Customers:** This chart gives the sales person the ability to graph the lifetime value of his/her top n customers.
- **Leads:** This chart gives the sales person the ability to graph new leads.
- **Opportunity by Close Date:** This chart gives the ability to graph the open opportunities by close date.
- **Forecast History - Subordinates:** This chart gives the sales manager the ability to graph the submitted forecast numbers for his/her subordinate sales reps or groups.
- **Opportunity by Win Probability:** This chart gives the ability to graph the open opportunities by win probability.

4.2.3 Available Bins, Charts, and Reports

List of available bins, charts, and reports to display on the home page:

Navigation

Profiles > Home Page

4.2.3.1 Bins

Available bins:

- **New Leads:** This bin provides the count and amount of leads assigned to the user/period, rolling up to a sales person. Only the leads that are assigned to a sales group, and to a sales person, are rolled up and displayed in this bin.
- **Open Opportunities:** This bin shows all opportunities where the Open flag is set to Yes within the period or parameters indicated.
- **Won Opportunities:** This bin shows all opportunities where the Open flag is set to No and the win/loss indicator is set to Won within the period or parameters indicated.
- **My Forecast:** This bin provides a list of all forecast numbers that have been submitted per period by a sales person. If the value for "My Forecast Type" is set to "My Subordinate Forecasts" the forecast values submitted for the subordinate groups are shown here.
- **My Favorites:** This bin provides the ability to bookmark application pages, saved reports, or saved searches that you can run at a later time. Free URLs and the links published by system administration on the external tools page can also be saved for later access in this bin.
- **Win/Loss Ratio:** This bin provides a count of won opportunities, losses, and the ratio per period rolling up to a sales person. Loss analysis is an effective tool used by management to measure the sales effectiveness of the organization. The percentage data is based on the total opportunity amounts.
- **Opportunity Status:** This bin shows links to a set of reports explained below:
 - **Closed Opportunities** - Opportunities that have been closed in the last "n" days and roll up to the logged in user are shown here. The value "n" is controlled by the profile "*OSO: Opportunity Variance Bin Reports Number of Days.*"
 - **Aging Opportunities** - Opportunities that have been open for more than "n" days and roll up to the logged in user are shown in this report. The

value "n" is controlled by the profile "*OSO: Opportunity Variance Bin Reports Aging Days*."

- **High Value, About to Close** - Opportunities rolling up to the user that have values greater than certain amount and the close date is in the next "n" days are shown here. The opportunity value is controlled by "*OSO: Opportunity Variance Bin Reports Amount*" profile. The value for 'n' is controlled by "*OSO: Opportunity Variance Bin Reports Number of Days*" profile.
- **High Value, Low Probability** - Open opportunities with value greater than the value specified by "*OSO: Opportunity Variance Bin Reports Amount*" profile and win probability less than the value specified by "*OSO: Opportunity Variance Bin Reports Win Probability*" profile that roll up to the log in person are shown in this report.
- **Lost Opportunities** - Opportunities that roll up to the log in person and have been updated to "Lost" status in the last "n" days are shown in this report. The value for "n" is controlled by the profile "*OSO: Opportunity Variance Bin Reports Number of Days*."
- **Opportunities About to Lose** - Open opportunities that roll up to the person and have a win probability less than the value set for "*OSO: Opportunity Variance Bin Reports Win Probability*" and have a decision date in the next "n" days. The value for "n" is controlled by the profile "*OSO: Opportunity Variance Bin Reports Number of Days*."
- **Opportunities Potentially lost** - Open Opportunities that roll up to the log in person and have a decision date in the next "n" days are shown in this report. The value for "n" is controlled by the profile "*OSO: Opportunity Variance Bin Reports Number of Days*."

4.2.3.2 Charts

Available charts:

- **Opportunity by Close Date:** This chart provides the ability to graph the open opportunities by close date. The opportunities that have a valid sales stage, an assigned sales group, and a resource, are rolled up and displayed in this chart. The decision date for the opportunities shown must be in the selected period range for this chart.
- **Opportunity by Status:** This chart provides the ability to graph the opportunity by status. The chart shows the open and won opportunities that have a decision date within the period range selected. The opportunities should have valid sales stage, be assigned to a sales group and a resource.
- **Forecast History-Self:** This chart gives the ability to graph the submitted forecast numbers for a sales person. Forecasts with forecast category and a sales credit type that do not match the default setting are not shown in this chart.
- **Forecast History-Subordinates:** This chart gives the sales manager the ability to graph the submitted forecast number for his/her subordinate sales representatives or groups. Forecasts with forecast category and a sales credit type that do not match the default setting are not shown in this chart.
- **Top Customers:** This chart gives the sales person the ability to graph the lifetime value based on ordered amount of his/her top "n" customers. In order for the Top Customers chart to work, it is required that you run the Oracle Order Management concurrent program "Calculate Party Totals."
- **Opportunity by Win Probability:** This chart gives the ability to graph the opportunities by win probability. The opportunities should have a decision date within the period range selected, be assigned to a valid sales group and a resource.
- **Leads:** This chart gives the sales person the ability to graph new leads. The leads assigned to valid sales groups and resources (created in the selected time period range) are rolled up.

4.3 Editing Bins, Charts, or Reports

You can edit the bin, chart, or report parameters to meet your desired display preferences.

Navigation

Home > Edit

Topics included are:

- [Section 4.3.1, "Editing Directly from the Bin, Chart, or Report"](#)
- [Section 4.3.2, "Editing from the Profiles Page"](#)
- [Section 4.3.3, "Editing "My Favorites" Bin"](#)

4.3.1 Editing Directly from the Bin, Chart, or Report

Follow these steps to edit the item directly from the Home Page. This method assumes that the bin, chart, or report is currently displayed on your home page.

Steps

1. Click **Edit**.
2. Change the parameters to meet your specific requirements. For example, to display a different period type, select from the drop-down menu. You can change from month, or quarter, to year.
3. Click **Save**.

4.3.2 Editing from the Profiles Page

Navigation

Profiles > Home Page > Edit

Use the Profiles section to edit a bin that is not currently displayed on your home page. This alternative method takes you to the profiles page where you can set up the item and then edit the item. Once you have entered the Edit page, select parameters and click **Update**.

4.3.3 Editing "My Favorites" Bin

The "My Favorites" bin, allows you to further customize a bin to list items that are of particular interest to you.

Navigation

Home Page > Edit

Steps

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

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

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

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

1. Indicate the order in which you want the items to appear by selecting the number in the "Row Numbers" drop-down list.
2. If you choose to remove an item, check the Remove box.
3. Click **Save**.

4.4 Using Internal Tools

The following tools are available from the Home Page:

- [Section 4.4.1, "Territory Lookup"](#)
- [Section 4.4.2, "Event Lookup"](#)

4.4.1 Territory Lookup

This tool provides a way for Oracle Field Sales users to locate the sales representative responsible for a particular territory. Territory Lookup is provided through Oracle Common Applications Components. Refer to the *Oracle Common Application Components User Guide* for more information.

Navigation

Home > Tools > Internal Tools > Territory Lookup

4.4.2 Event Lookup

Navigation

Home > Tools > Internal Tools > Event

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

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

Event Lookup is provided through Oracle Marketing. Refer to the *Oracle Marketing User Guide* and *Oracle Marketing Implementation Guide* for more information about this topic.

4.5 Using External Tools

External Tools are grouped into three sections: Collaboration, Self Service Applications, and Oracle Homepage.

Navigation

Administration > Sales > Home Page > External Tools

Available Tools

These links take you to the associated application. For example, clicking the Project Listing link takes you to Oracle Projects. Refer to the documentation related to these applications for more information.

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

These links are also available to add to your "My Favorites" bin on the home page.

5

Calendar

Oracle Field Sales uses the calendar functionality of Oracle Common Application Components.

Topics included are:

- [Section 5.1, "Overview of Calendar"](#)
- [Section 5.1.1, "Calendar Profiles and Views"](#)

5.1 Overview of Calendar

The key functionality of the HTML Calendar includes viewing and updating your tasks, subscribing yourself to a group calendar, viewing public calendars, creating and managing appointments, and inviting individuals to those appointments. The HTML Calendar is used by many CRM Applications, including Oracle Field Sales, for generic calendar functionalities like appointments and tasks as well as to show business entities like events and campaigns. Click the hyperlink for the task, appointment, or event and access the details for that specific object.

Refer to the *Oracle Common Application Components User Guide* for information.

5.1.1 Calendar Profiles and Views

Refer to the *Oracle Common Application Components User Guide* for information on setting Calendar Profiles and Views.

Oracle Leads Management comprises solutions to automate and optimize prospect-to-sales conversion across the enterprise.

Topics included are:

- [Section 6.1, "Overview of Leads"](#)
- [Section 6.2, "Creating Leads"](#)
- [Section 6.3, "Updating Leads"](#)
- [Section 6.4, "Assigning a Lead Owner"](#)
- [Section 6.5, "Qualifying Leads"](#)
- [Section 6.6, "Rating Leads"](#)
- [Section 6.7, "Selecting a Sales Channel"](#)
- [Section 6.8, "Converting a Lead to an Opportunity"](#)
- [Section 6.9, "Linking a Lead to an Opportunity"](#)
- [Section 6.10, "Appending Lead Lines to an Opportunity"](#)
- [Section 6.11, "Declining Leads"](#)
- [Section 6.12, "Performing Mass Operations on Leads"](#)
- [Section 6.13, "Attaching a Contact to a Lead"](#)
- [Section 6.14, "Creating Sales Campaign Schedules"](#)
- [Section 6.15, "Viewing Interactions"](#)
- [Section 6.16, "Viewing Lead Reports"](#)

6.1 Overview of Leads

Leads Management provides a staging area for all prospect leads for data quality processing, prioritization and distribution, enterprise review, and conversion.

The Leads Management features include:

- Lead capture
- Customer and lead data quality
- Real time flexible rules engine for lead evaluation and distribution
- Integrated monitoring
- Multiple channel lead handling and maturation
- Lead utilization and effectiveness analysis
- Sales Campaign Schedule creation

6.1.1 Lead Sources

Leads may be generated through different sources:

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

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

6.1.2 Lead Statuses

The status of the lead is input by the lead creator. The seeded statuses are:

- New
- In Progress
- Converted to Opportunity
- Dead Lead

- Loss

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

6.2 Creating Leads

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

Steps

Follow these steps to create a lead:

1. Click **Create**.
The Create Lead page opens.
2. Enter the Lead Owner. If Lead Owner is left blank, the lead will be automatically assigned.
3. Select a Channel from the drop-down list. If the Channel field is left blank and the profiles are properly set for Automatic Sales Channel Selection, this lead will be run through the Lead Rules Engine automatically upon creating the lead.
4. If the Rank field is left blank and the profiles are properly set for Automatic Lead Ranking, this lead will be run through the Lead Rules Engine automatically upon creating the lead.
5. Enter a Budget amount and select the currency with which the budget is to be associated. Purchase Items will reflect the same currency code as selected here.

6.3 Updating Leads

You can update lead details at any time. The Leads Rules Engine is automatically run when a lead is updated and the profile *Auto Run Lead Engine* is set to "Yes", the default. If the profile is set to "No", upon updating lead details, you must blank out the Qualified and Channel Rank fields, and click the Run Leads Engines button.

Steps

1. Navigate to the lead.
2. Update lead details.
3. Click **Update**.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for more information.

6.4 Assigning a Lead Owner

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

Steps

Follow these steps to re-assign a lead:

1. Navigate to the lead.
2. In the Lead Owner field, enter a search string and click **Go**.
If the Lead Owner field is left blank, the lead will be automatically assigned.
3. From the list of values, select the sales team member to which you want to re-assign the lead.
4. Click **Update**.

6.5 Qualifying Leads

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

A lead is qualified:

- through the lead rules engine
- or manually

6.5.1 Lead Rules Engine Qualification

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

Click **Run Leads Engines**.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for more information on the lead rules engine.

6.5.2 Manual Qualification

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

1. From the Lead Detail page, select the Qualified box.
2. Click **Update**.

If this box is left unchecked, the qualification engine will determine if the lead is qualified or not by clicking the Run Leads Engines button.

6.6 Rating Leads

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

6.6.1 Ranking with the Lead Rules Engine

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

The seeded lead ranks are based on order of importance:

- Cold Lead: a minimum score =1 and a maximum score = 25
- Low Lead: a minimum score =26 and a maximum score =50
- Medium Lead: a minimum score =51 and a maximum score = 75
- Hot Lead: a minimum score =76 and a maximum score =99
- Incomplete: a score of zero
- Unqualified: a score of zero

If the Lead Rank is updated, click **Run Leads Engines** if available based on the profile *Auto Run Lead Engine*.

6.6.2 Manually Rank a Lead

Use this procedure if you are not using the Lead Rules Engine or if you want to override a rank given by the Leads Rules Engine.

Steps

1. From the Lead Detail page, select the lead rank from the drop-down list.
2. Click **Update**.

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

6.7 Selecting a Sales Channel

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

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

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

6.7.1 Lead Rules Engine Selects the Sales Channel

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

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

6.7.2 Manually Selecting a Sales Channel

Steps

Follow these steps to manually select a sales channel:

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

6.8 Converting a Lead to an Opportunity

Convert a lead to an opportunity when the lead has shown sufficient progress and can be considered an opportunity according to your business rules.

A lead can be converted into multiple opportunities but once a lead is converted to an opportunity and updated, it cannot be converted back to a lead.

Steps

Follow these steps to convert a lead to an opportunity.

1. Navigate to the lead you want to convert.
2. Click **Convert to Opportunity**.

The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.

3. Click **Create Opportunity**.

Follow the steps in [Section 7.2, "Creating Opportunities"](#).

6.9 Linking a Lead to an Opportunity

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

Steps

1. Click the **Convert to Opportunity** button.

The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.

2. Choose the **Select** button to indicate the opportunity you have selected.

The Lead Linking Opportunity Detail page opens.

3. Click **Link to Opportunity**.

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

6.10 Appending Lead Lines to an Opportunity

Follow these steps to append a lead to an opportunity:

Steps

1. Navigate to the lead.
2. Click **Convert to Opportunity**.
The Lead Linking - Opportunity Summary page opens. You can link to an existing opportunity or create a new opportunity from this page.
3. Choose the **Select** button to indicate the opportunity you have selected.
The Lead Linking Opportunity Detail page opens.
4. Check the Select box next to the lead lines you want to append to the opportunity.
5. Click **Link to Opportunity**.

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

6.11 Declining Leads

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

Steps

1. Navigate to the lead.
2. Decline the lead.

6.12 Performing Mass Operations on Leads

You can mass update and mass evaluate a number of selected leads by navigating to the main leads page and clicking either the Mass Update or Mass Evaluate button.

6.12.1 Mass Update

Using mass update, you can:

- **Mass Accept**
Use this feature to select multiple leads, and accept them.
- **Mass Decline**
Use this feature to select multiple leads, and decline them. You must provide a reason for declining the leads.
- **Mass Status Update**
Use this feature to select multiple leads, and update their status. If the lead's current status is Open, and if you updated the status to Close, you are asked to state a reason for the same.
- **Mass Convert to Opportunity**
Use this feature to select multiple leads, and convert them all to opportunities.

6.12.2 Mass Evaluate

You can select multiple leads and update them with the selected qualification, rank, and channel values. If any of these fields are left blank, the corresponding rule engine is run and the lead is updated with the values. You also have the option of selecting an owner and updating the list of leads with the new owner. If the owner is not selected, it is automatically selected and updated.

6.13 Attaching a Contact to a Lead

If there is a contact that is associated with a lead, you can attach that contact to the lead using this procedure.

Navigation

Lead > Leads > Contacts

Steps

1. Click the **Contacts** link.

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

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

The Select a Person page opens.

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

6.14 Creating Sales Campaign Schedules

Creating sales campaign schedules is used in both Oracle Marketing and Oracle Field Sales. A sales campaign is created in Oracle Marketing, leads are selected through the sales campaign criteria set up, leads are generated and assigned to sales representatives. Leads are worked and converted to opportunities through Oracle Field Sales.

Refer to the *Oracle Marketing User Guide* for information on creating sales campaign schedules.

6.15 Viewing Interactions

Interactions are customer contacts associated with business events such as event registration, survey completion, or a web visit. Each business event is associated with a default score that reflects the significance of the interaction. These interactions are evaluated through a "mining engine" to determine if potential sales opportunities exist. Interactions are then linked, or created as leads, for follow up if interest is determined as sales ready. A mining engine provides linking rules for managing these interactions. These rules are used to determine how interactions are evaluated to generate leads. Refer to the *Oracle Leads Management Implementation and Administration Guide* for information about setting up the mining engine.

To view interactions, select the lead for which you want to view details. Click the **History** link.

6.16 Viewing Lead Reports

The seeded lead reports are:

- **Lead Import Status:** This report provides the status of the Lead Import.
- **New Leads Generated via Lead Import:** This report provides new leads generated via lead import.
- **Customer Data Generated via Lead Import:** This report provides customer data generated via lead import.

Steps

Click a report name to launch the parameter page. Click the corresponding Run Report button to show the report without changing any input parameters. Select parameters to customize the report.

Opportunities

The Opportunity tab is used for managing all aspects of opportunities.

Topics included are:

- [Section 7.1, "Overview of Opportunities"](#)
- [Section 7.2, "Creating Opportunities"](#)
- [Section 7.3, "Updating Opportunities"](#)
- [Section 7.4, "Copying Opportunities"](#)
- [Section 7.5, "Creating a Quote from an Opportunity"](#)
- [Section 7.6, "Adding a Classification"](#)
- [Section 7.7, "Linking an Opportunity to a Lead"](#)
- [Section 7.8, "Adding a Key Competitor to an Opportunity"](#)
- [Section 7.9, "Adding a Competitor at the Purchase Item Level"](#)
- [Section 7.10, "Understanding Sales Credits"](#)
- [Section 7.11, "Adding a Contact to an Opportunity"](#)
- [Section 7.12, "Closing Opportunities"](#)
- [Section 7.13, "Tracking Win/Loss Information"](#)
- [Section 7.14, "Viewing Opportunity History"](#)
- [Section 7.15, "Opportunity Reports"](#)

7.1 Overview of Opportunities

Definition

Opportunities are defined as pending sales that can be forecasted.

Overview

Once an opportunity is identified, a sales representative or sales manager guides the opportunity through the sales process. An opportunity can be converted from a lead, or created as a new opportunity.

An example of the opportunity life cycle:

- A sales representative creates a new opportunity.
- The opportunity is tracked and managed using summary data including potential deal value, sales stage, win probability, and expected close date.
- Additional information is added through notes, tasks, and potential obstacles such as competitors.
- A quote is generated for the opportunity.
- A proposal is sent to the customer regarding the opportunity.
- The opportunity is won.

The sales representative who creates the opportunity gains "full" access to the opportunity. Full access allows the sales representative to add other sales team members, assign sales credits, and estimate the likelihood that an opportunity will be won.

7.2 Creating Opportunities

Create an opportunity for a pending sale that will be included in a forecast. Only users with "create" access are able to create new opportunities.

Steps

Follow these steps to create a new opportunity:

1. Click **Create**.

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

2. Enter an opportunity name that will be used throughout the application to identify the opportunity.

3. Assign an opportunity owner.

Enter the full or partial name of the opportunity owner and click **Go**. The owner will be automatically added to the internal sales team for this opportunity and the Owner radio button column in the opportunity sales team page will be checked for the sales person that was added.

4. Select the desired currency from the drop-down list. For example, you can select Euro.

5. Enter the budget amount for this opportunity, if known. This amount indicates what the potential sale might be worth.

6. Opportunities are related to a specific customer. In this step, use the Select a Customer field to enter the name of the organization, or person, to which this opportunity is associated.

a. If the customer is located in a country outside of your country, select that country from the drop-down list.

b. Click **Go**.

The Select a Customer page opens with the search results.

c. Select a customer by clicking the customer link.

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

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

7. In the Progression section, track the progression of the opportunity by adding the following information:
 - a. Select a Status from the drop-down list.
 - b. Select the Sales Stage from the drop-down list.
 - c. Select the Win Probability for the opportunity from the drop-down list. This selection indicates your estimate of winning this opportunity.
 - d. Optionally, add a Sales Methodology from the drop-down list. The "Eyeglasses" icon displays the details of the current selection. Click to view details.
 - e. Optionally, add a Close Date. The default is 44 days or as determined by your implementation set up.
8. In the Additional Information section, you can add information to create a more detailed account of the opportunity:
 - Relate this opportunity to an existing project. Select the project and click **Go**.
 - If there is a key competitor for this opportunity, you can indicate this competitor.
 - If the source of the opportunity is known, indicate where the opportunity originated.
 - Indicate the sales channel by selecting from the drop-down list. Sales Channel is the only field required to create this opportunity. Examples of sales channels are, email or internet.
 - Select a response channel from the drop-down list. Examples of response channels are, letter, email, phone, or fax.
 - If there is an offer related to the opportunity, enter the offer name and click **Go**. An offer may be a special discount or special promotion.
9. In the Purchase Items section, list the purchase items for this opportunity by selecting the products and specifying the amounts in the table. Click the "Add Multiple Items" button to create multiple purchase lines for the same product with different forecast dates.
10. Optionally, you can enter Contacts by typing the partial or full last name of the person and clicking **Go**. Select an existing contact of this customer to be added as a contact to this opportunity. You can create new contacts by entering their information into the table directly.

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

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

7.2.1 Quick Create Opportunities

This feature provides you with an abbreviated information page for creating opportunities quickly. Only basic information is used to create the opportunity.

Steps

1. Click **Quick Create**.

The Create Quick Opportunity page opens.

2. Enter an opportunity name, this value will be used throughout the application to select and view this opportunity.
3. Select a customer to associate this opportunity with by entering the customer name, click **Go**. Select from the search results.
4. Select the source of the opportunity by entering the first few letters of the source name, using the percent sign (%) as a wildcard character, click **Go**.
5. Select the currency with which this opportunity will be evaluated.
6. Select the sales channel with which the opportunity was received.
7. Click **Create**.

7.2.2 Creating Rolling Opportunities

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

Steps

Follow these steps to create rolling opportunity line items.

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

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

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

7.3 Updating Opportunities

When opportunity details are kept current, information is available to other sales team members who may view the opportunity at any given time.

An opportunity can be updated only if the user has access to the opportunity as determined by security settings set during implementation.

Steps

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

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

The currency used for the transaction amount and the currency for the budget are the same value. If the budget currency is updated, the transaction amount currency will also be changed.

Update the owner of an opportunity. The opportunity detail page and the sales team page automatically synchronizes when the owner of the opportunity is updated from either page. If you reassign the opportunity to a sales person who is not on the internal sales team from the opportunity detail page, then the new owner will be added to the sales team automatically.

The Freeze checkbox facilitates the opportunity lock out feature. Once this box is selected, no one on the sales team is allowed to update the opportunity. This "Freeze" box overrides all access privileges. However, users whose *"Update Frozen Opportunities"* profile option is set to "Yes" can update frozen opportunities and uncheck the Freeze box.

Source name is the marketing source name that generated the opportunity. An example is "by direct mail."

User Amount is a read-only column which displays the transaction amount converted to user currency. If the currency used for the transaction amount is the same as the currency in the user amount, both fields will still be displayed.

2. Click the Split icon in "Sales Credits" column to assign sales credits for the selected line item.
3. Click **Update**.

7.4 Copying Opportunities

In Oracle Field Sales you can copy an existing opportunity to create a new opportunity.

Steps

1. Navigate to the opportunity that will be copied.

2. Click **Copy**.

The Copy Opportunity page opens.

3. Enter the Opportunity Name. This is the name that is used to identify and search for this opportunity. The default is "copy of (opportunity name)".

4. Optionally, change the name of the customer.

5. Choose from the list of options by selecting the attribute checkbox:

- Purchase Items: When copying an opportunity, if you select just the purchase items parameter, the sales credits will also be copied, but all sales credits are assigned to you.
- Sales Team: This attribute will copy the sales team members to the newly created opportunity.
- Sales Credits: If you select the purchase items and sales credits parameters at the same time, then the sales credits will be assigned in the same manner as they appear in the original opportunity
- Competitors: This attribute will copy the competitors to the newly created opportunity.
- Opportunity Contacts: This attribute will copy the opportunity contacts to the newly created opportunity. If customer is changed, the contact information becomes read only.
- Sales Methodology: This attribute will use the same sales methodology for the newly created opportunity.

6. Click **Copy**.

7.5 Creating a Quote from an Opportunity

Provide your customer with quote information by creating a quote from an opportunity.

Prerequisites

This functionality is available if you have implemented Oracle Quoting.

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

Steps

1. Navigate to the opportunity.

The Opportunity Detail page opens.

2. Click **Create Quote**.

The Create Quote page opens.

3. The Quote Name field defaults from the Opportunity Name.

4. The following fields, if available, are defaulted to the quote.

- Customer Name
- Account Number
- Opportunity Name

5. Click **Apply** to create the quote.

A message appears to confirm that you have create a quote.

To check existing quotes for the opportunity, click the Quotes link on the left navigation menu.

For more information about quotes and Oracle Quoting, please refer to the *Oracle Quoting User Guide*.

7.6 Adding a Classification

You can classify opportunities into categories that have been defined by your System Administrator. These opportunity classifications are used for territory assignment and for reporting data.

Navigation

Opportunity > Select an Opportunity > Classifications

Steps

1. Navigate to the opportunity.
2. Select **Classifications**.
3. Select a Classification from the drop-down list that best describes your opportunity.
4. Click **Update**.

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

7.7 Linking an Opportunity to a Lead

You can link an opportunity to an existing lead with the proper profile settings.

Prerequisites

OS: Linking Opportunity to Lead

This profile is set by the System Administrator during implementation. There are three settings for the profile:

- Allow with prompt
- Allowed
- Not allowed

Navigation

Opportunity > Select an opportunity > Leads

Steps

1. Click **Leads**.
2. Click **Link Opportunity to Lead**.

The Link Opportunity to Lead page opens.

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

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

7.8 Adding a Key Competitor to an Opportunity

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

Related Profiles

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

Steps

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

7.9 Adding a Competitor at the Purchase Item Level

Prerequisites

Oracle Marketing must be installed to use this feature.

Steps

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

1. Navigate to the opportunity.
2. Click **Competitors**.

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

3. Click **Add Competitors**.
4. Select the related purchase items that you want to add from the Purchase Items drop-down list.
5. Select the competitor from the drop-down list.
6. Select the competitor product from the drop-down list. These products were specifically set up to be associated with this competitor.
7. A box is provided so that you can indicate if this is a key competitor. If you check this box, the opportunity detail page will automatically be updated with the new information.
8. Click **Add**.

7.10 Understanding Sales Credits

Oracle Field Sales provides this feature to distribute sales credits to salespeople and partners. Sales Credits include Forecast Credits and Other Credits. Forecast Credits are used for forecasting and can be split between multiple salespeople but must total 100% of the purchase item line, and Other Credits do not have to equal 100% of purchase items line. When creating an opportunity, 100% of each purchased item is allocated to the opportunity creator in Forecast Credits.

Please note, in order for a sales manager to receive sales credits, the sales manager must also have a role of sales representative. This can be achieved in the roles set up outlined in the *Oracle Field Sales Implementation Guide*.

- [Section 7.10.1, "Updating Sales Credits"](#)
- [Section 7.10.2, "Adding a Salesperson to Receive Sales Credits"](#)
- [Section 7.10.3, "Adding a Partner to Receive Sales Credits"](#)

7.10.1 Updating Sales Credits

Follow these steps to split sales credits:

Steps

1. Navigate to the opportunity for which you want to update the sales credit information.
2. Scroll to the Purchase Items table.
3. Click the **Split Sales Credits** link.
4. Choose **Add a Salesperson** or **Add a Partner**.
5. Enter the credit amount or percentage of credits that the salesperson or partner will receive.
6. Click **Update**.

7.10.2 Adding a Salesperson to Receive Sales Credits

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

Steps

1. Navigate to the opportunity for which you want to add a salesperson to receive sales credits.
2. Scroll to the Purchase Items table.
3. Click the **Split Sales Credits** link.
4. In the Add a Salesperson field, enter the last name of the salesperson.
5. Click **Go**.
6. Select an employee by clicking the employee name link.
To search for an employee outside your business group, select the business group from the drop-down list, click **Go**.
7. Enter credit amount (forecast or other).
8. Click **Update**.

7.10.3 Adding a Partner to Receive Sales Credits

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

Steps

1. Navigate to the opportunity for which you want to add a partner to receive sales credits.
2. Scroll to the Purchase Items table.
3. Click the **Split Sales Credits** link.
4. In the Add a Partner field, enter the name of the partner, and click **Go**.
5. Select a partner by clicking the partner link. This list is limited to those organizations that are defined as a "sales" partner.
6. Enter credit amount (forecast or other). To enter Other Credits, choose a credit type from the drop-down list.
7. Click **Update**.

7.11 Adding a Contact to an Opportunity

Follow these steps to add a contact:

Steps

1. Navigate to the opportunity for which you want to add a contact.
2. Click **Contacts**.
3. To search for an existing person to add as a contact, enter the last name in the Add a Person field and click **Go**.
4. From the Select a Person page, choose from the list of search results by choosing the Select checkbox and clicking the **Select** button.

If you cannot find the person you are looking for, you can widen your search to look for all people checking the Search All People or the Search All Contacts radio button.

5. To add a contact, which does not already exist as a customer, enter the contact information directly into the table provided.
6. Click **Update**.

7.12 Closing Opportunities

Closing an opportunity consists of collecting information about the status of the opportunity and the reason that it is being closed. This is also called Win/Loss Tracking.

Follow these steps to close an opportunity.

Steps

1. Navigate to the opportunity that you are closing.
2. Click **Close**. Optionally, you can navigate to the page by clicking the Win/Loss link.
3. Select from the drop-down list of opportunity statuses. For example, if the opportunity was lost to a competitor, select Lost from the list. If you do not change the status, the opportunity will remain open.
4. Select a close reason. To continue the previous example, if the opportunity was lost to a competitor, select Competition.

- **Competitor Products:** This section allows tracking of the competitors by each purchase line item. There can be multiple competitors for each line item and the same competitor can be selected for multiple line items. The Won/Loss value can be selected for each competitor by purchase item. This is key for accurate win/loss reporting. You could win the sale of laptop computers against competitor 'A'/laptop 'X', but lose the sale of desktop computers against competitor 'B'/desktop 'Y'.
 - **Decision Factors** of the customer are prioritized for each purchase item. These could include product features or price.
 - **The Other Issues** area is for tracking related obstacles/issues that contributed to the win or loss of the opportunity. These issues can be monitored throughout the sales process and closed as they are resolved with the customer.
5. Click **Update**.

7.13 Tracking Win/Loss Information

The win/loss link is used to keep information about the status of an opportunity. You can track if the opportunity is in a Preliminary, Expired, Lost, No Opportunity, or Won status. Refer to [Section 7.12, "Closing Opportunities"](#).

7.14 Viewing Opportunity History

To view the opportunity history information, click the History link. This page is a read-only view that displays the changes made to an opportunity, when the changes were made, and who made the changes.

7.15 Opportunity Reports

You can view any of the following Opportunity Reports from the Organization tab, under the Reports subtab.

Available Reports

- **Opportunity Summary Report:** This report provides a detailed list of opportunities with amounts for each product category, rolled up by product category.
- **Opportunity Summary Report by Group:** This report provides a summary of all opportunities by the sales group.
- **Opportunity Detail Report:** This report provides a detailed listing of the selected opportunities.
- **Opportunity Access Report:** This report provides a list of opportunities based on a manager and his or her subordinates. Please note, although the access report can be run by any sales team member, it will display only sales team members who have sales credits. Additionally, the report contains partner information for the opportunity.
- **Opportunity Progression Dashboard:** The purpose of the progression dashboard is to provide a tool for you to track the completion of predefined tasks for opportunities following a particular sales methodology. The situations in which the progression dashboard does not show data are listed below. These assumptions were made to improve query performance and because you can use the opportunity summary report if you want a complete list of opportunities.
 - Opportunities that do not have a sales methodology selected will not be shown even if you have sales credit to them.
 - Opportunities that do not have any tasks created automatically by the sales methodology workflow, even if they have a particular sales methodology selected, will not be shown. As a consequence of this assumption, if the sales stages of a methodology does not have a task templates assigned to them, no tasks are created automatically and no opportunities are shown for these sales methodologies.
 - If a sales stage of an opportunity does not have a task template group mapped to it, those sales stages are not displayed in the report. This report provides a list of tasks for each opportunity by sales methodology.

- **Opportunity Classification Report:** This report provides opportunities by classification. Classifications are established by a system administrator during application implementation or through the Administration tab.
- **Opportunity Aging Report:** This report provides the ability to view a list of opportunities and compare aging trends based on the close date of the opportunity.
- **Opportunity Aging by Status Report:** This report provides the ability to view a list of opportunities and compare aging trends based on the different statuses that the opportunity has been through during the sales cycle.
- **Opportunity by Product Report:** The Opportunity by Products report gives sales representatives, sales managers, and sales executives the ability to view a list of opportunities based on the Product Categories and/or Products that are included in the opportunity lines.
- **My Reports and Charts:** My Reports list the reports you have saved using the Personalize functionality and the reports published by the System Administrator. When you enter specific filters, display options, sort options, and enter a name for the report. The available charts are: Opportunity Chart by Close Date, Opportunity Chart by Status, Opportunity Chart by Win Probability.

Note: Disabled product categories are shown in reports and advanced search to allow you to search and report on existing transaction data even if product categories are disabled.

Navigation

Opportunity > Reports > Click the link for the report you want to run

Steps

1. Select filters.
2. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

To move all available columns into the display columns section click the >> button.
3. In the Save Report section, click:
 - **Save:** to save the report.
 - **Save and Run Report:** to run the report and save it.

- **Run Report:** to run the report without saving the report.
 - Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.
4. Check the "Use as Report Default" box to use the report as a default.

Downloading Reports

To download any of the opportunity reports into a spreadsheet, click the Export button.

8.1 Quoting

Oracle Field Sales uses the quoting functionality of Oracle Quoting.

Refer to the *Oracle Quoting User Guide* for instructions on using quotes.

Forecasting

The Forecasting tab is used to manage all aspects of forecasting.

Topics included are:

- [Section 9.1, "Overview of Forecasting"](#)
- [Section 9.2, "Creating and Submitting Forecasts"](#)
- [Section 9.3, "Quick Forecast"](#)
- [Section 9.4, "Automatically Submitting Worksheets"](#)
- [Section 9.5, "Opportunity Worksheet"](#)
- [Section 9.6, "Personalizing Opportunity Worksheet Table"](#)
- [Section 9.7, "Forecast Threshold Overview"](#)
- [Section 9.8, "Product Category Worksheet"](#)
- [Section 9.9, "Linking to Compensation"](#)
- [Section 9.10, "Viewing Forecast History"](#)
- [Section 9.11, "Viewing Product Category History"](#)
- [Section 9.12, "Viewing Opportunity History"](#)
- [Section 9.13, "Forecast Reports"](#)

9.1 Overview of Forecasting

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

Prerequisites

To use the forecasting functionality, the following setups are prerequisites.

- Sales Resource Hierarchy should be set up.
Refer to the *Oracle Field Sales Implementation Guide* section on "Setting up Users, Employees, and Resources".
- Forecast calendar must be set up.
- Opportunity management must be set up.
- If you are using multiple currencies for global deployment, currency set up must be complete.

9.1.1 Worksheets

There are two types of worksheets:

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

9.1.2 Views

Roles play an important part in forecasting functions. For example, in viewing forecasts, a manager can view the forecasts for the subordinates but a sales representative cannot view any other forecasts besides his or her own. An Administrator and a Manager have the same privileges, except that an Administrator cannot submit forecasts.

Example

If you are submitting a forecast and you have a salesperson role and an administrator role, within the same group, the application will default you to salesperson because the administrator role cannot submit a forecast.

Also, if you are submitting a forecast and you have a salesperson role and a manager role, within the same group, the application will default you to manager. If you are running a forecast report, by default, the Worksheet Type defaults to your manager view rather than your subordinate view.

9.1.3 Pipeline Defaults

Forecasting uses the sales credits on each opportunity line to determine the pipeline numbers for a particular forecast period.

Pipeline values reflect the following:

- The total forecast credit amount of the opportunities assigned to the sales representative or within the hierarchy of the manager.
- Pipeline = Forecastable opportunity amounts
- Weighted Pipeline = Forecast opportunity amounts multiplied by the win probability
- Won to Date = Forecast opportunity amounts where status is set to the status of "Won"

Previously Saved Values (default): If you are forecasting for the first time, the value is based on profile preferences. If you have saved a product category worksheet, those values will be the default.

Pipeline Default Amounts: This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

Pipeline defaults use the following criteria:

- **Worst Case:** Total Won Amount=Sum of all won opportunities
- **Forecast:** Weighted pipeline=Weighted sum of open opportunity amount multiplied by their win probability
- **Best Case:** Total sum of all open opportunities

9.1.4 Win Probability Based Defaults

An example:

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

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

- Best case = total opportunity amount
- Forecast = total opportunity amount
- Worst Case = opportunity amount

Win probability 60-79:

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

Win probability 40-59:

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

Win probability 0-39:

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

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

- Best case = opportunity amount
- Forecast = opportunity amount
- Worst case = opportunity amount

9.1.5 Overview of Multi-Currency

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

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

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

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

If you are a manager or administrator, the currency is always converted on the forecast main page.

9.2 Creating and Submitting Forecasts

Use these steps to create and submit forecasts for review by management.

Steps

Follow these steps to create and submit Forecasts:

1. Select the Group, Period, Category, and Credit Type. For example, select Quarter, Q1 of 2004.
2. Click **Apply** to see the results in the table below.
3. Update Best Case, Forecast, and Worst Case values with the amounts that you want to submit to management.
4. Click **Submit Forecast and Worksheets** to submit your forecast values.

Warning: When using the auto submit worksheet feature, any saved worksheets are overwritten with the defaults.

9.3 Quick Forecast

Sales representatives can generate forecasts for multiple periods directly from the pipeline. The forecast profile options control whether the opportunity or product category worksheet is created, or both are created. The goal of this feature is to reduce the time it takes to create and submit the forecast.

Please note, resources that have been assigned a manager role in a group will not be able to use this feature. If assigned a manager role, you will receive the following error message when you click the Generate Forecast subtab: *"You do not have access to generate forecast."* However, this does not mean that a manager cannot submit forecasts, only that they cannot use the quick forecast feature.

Prerequisites

- *OSO: Forecast Max Generate Months*: "To" period cannot be greater than "From" period
- *OSO: Default Worksheet Values*: to submit values
- *OSO: Auto Submit Worksheets*

Steps

1. Click **Quick Forecast**.

The Generate Forecast for Multiple Periods page opens.

2. From the Sales Group section, select a sales group from the drop-down list. The list will include only those sales groups to which you belong.
3. From the Forecast section, select the Period Type from the drop-down list. For example, select Quarter.
4. Select the From Period and To Period from the drop-down lists. For example, if you selected Quarter, the corresponding items "Q1 to Q4" will appear in the drop-down list.
5. Select the Category from the drop-down list.
6. Select the Credit Type from the drop-down list.
7. Click **View**.

9.4 Automatically Submitting Worksheets

Sales Managers and Sales Representatives can automatically submit worksheets by setting the profile option "Auto Submit Forecast Worksheets" to None, Opportunity, Product Category, or Both. In accordance with your profile preferences for "Auto Submit Worksheets" you will submit worksheets according to preferences outlined in the table below. The profile setting "Default Worksheet Values" is used to default data into the worksheets. A message, located on the main Forecast page, reflects your current profile settings.

Navigation

Profiles > Field Sales Preferences > Forecasting

Steps

Follow these steps to set up automatic submission of worksheets:

1. From the Autosubmit Worksheet drop-down list, select your preferences.
2. Click **Update**.

The following table describes the Auto Submit Profiles.

Auto Submit Worksheets Profile	Default Worksheet Values Profile	How it works
None	N/A	The main forecast is submitted. Any previously saved worksheets are submitted with the main forecast.
Opportunity	0	The main forecast is submitted. The opportunity worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Opportunity	Pipeline	The main forecast is submitted. The opportunity worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.
Product Category	0	The main forecast is submitted. The product category worksheet is submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Product Category	Pipeline	The main forecast is submitted. The product category worksheet is submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.

Auto Submit Worksheets Profile	Default Worksheet Values Profile	How it works
Both	0	The main forecast is submitted. The opportunity and product category worksheets are submitted with values of 0 in best case/forecast/worst case columns for all worksheet lines.
Both	Pipeline	The main forecast is submitted. The opportunity and product category worksheets are submitted with default pipeline values in best case/forecast/worst case columns for all worksheet lines.

9.5 Opportunity Worksheet

Opportunity forecasting gives salespeople the ability to review, adjust, and commit to the numbers submitted in forecasting at the Product Category level.

9.5.1 Creating Opportunity Level Forecasts Using Opportunity Worksheets

Opportunity Worksheet is a tool to create your own view and commitment of the opportunities that you and your salespeople are working with. Select the filters below and click "Apply". Then update Best Case, Forecast, and Worst Case amounts and click "Save" to save your worksheet. The values you save in this worksheet will appear under the Forecast subtab to assist you in creating your forecast.

Navigation

Forecast > Opportunity

Steps

Follow these steps to create opportunity worksheets:

1. From the drop-down list select the Group for which you want to forecast.
2. Select the Period from the drop-down lists.
3. Select the Category from the drop-down list.
4. Select the Credit Type.
5. From the "Create Worksheet Using" radio buttons, select one of the following options:

Previously Saved Values (default): If you are forecasting for the first time, the value is based on profile preferences. If you have saved an opportunity worksheet, those values will be the default.

Pipeline Default Amounts: This includes all deals available for forecasting whose close date falls within the current forecasting period. If you choose this option, the pipeline amounts for the period are populated into the worksheet.

Subordinate Submitted Values: This includes values submitted by Subordinates. If there are no current subordinate submitted values, the values will default to zero. If thresholds are used by a subordinate, this value will always default to zero. Note, only managers are allowed to create worksheets using subordinate submitted values.

6. Click **Apply**.

The page is refreshed with all the opportunities within your pipeline which are forecastable. The values in the worst case, forecast, and best case fields reflect the radio button value that you selected. You can adjust the amounts in these fields to reflect your sales commitment.

7. Click **Save**.

To submit the worksheet, you must click the Submit Forecast and Worksheets button in the Forecast Main page.

9.6 Personalizing Opportunity Worksheet Table

Steps

Use the following parameters to define the criteria for forecasting opportunity lines individually. The remaining opportunities will be aggregated as a threshold line. See [Section 9.7.1, "Defining Your Forecast Threshold"](#).

1. Navigate to Forecast > Opportunity > Personalize icon.

2. Select parameters.

If "All" is selected for the columns, it means that there is no filter applied and footnotes will not appear for columns unless you specifically indicate some value.

3. Select display options.

If Product Category level forecasting is enabled, the following columns are not included in sort options:

- Close Date
- Stage
- Status
- Opportunity Amount
- Win Probability
- Weighted Amount

4. Select the order in which to display data.

5. Enter the number of rows to be displayed per page.

6. Click **Apply**.

9.7 Forecast Threshold Overview

A forecast threshold is a set of criteria defined in your profile preferences that establishes a value, and any forecast that meets the criteria and value is shown as an individual forecast. Before creating opportunity worksheets you can set up a forecast threshold to simplify your data input. This applies to opportunity worksheets only and using this feature is optional.

9.7.1 Defining Your Forecast Threshold

Oracle Field Sales provides a flexible way to generate opportunity level forecasts. The current opportunity worksheet provides the ability to forecast on all opportunities. The opportunity worksheet allows users to decide which opportunities to forecast individually and which opportunities to provide an aggregate forecast. To achieve this the opportunity worksheet will have parameters allowing each user to specify criteria for aggregating opportunities.

Steps

1. Navigate to the Opportunity Worksheet Table Personalization page by clicking the Personalize icon.
2. Select parameters:
 - Opportunity Amount > "n"
 - Win Probability Range
 - Opportunity Last Update Since
 - Stage
 - Channel
 - Status
 - Flexfields which are defined for the opportunity header

Example

Sales Representative "A" has set her forecast threshold total amount greater than or equal to \$4,000.00 and forecasted five opportunities with the following amounts:

Opportunity #1 = \$10,000.00

Opportunity #2 = \$ 5,000.00

Opportunity #3 = \$ 4,000.00

Opportunity #4 = \$ 2,000.00

Opportunity #5 = \$ 1,000.00

Since the threshold amount is set to \$4,000.00, the three opportunity amounts equal to or lesser than the threshold amount (3, 4, and 5) are rolled up and displayed on the worksheet in a lump sum. The opportunity worksheet would display the following three rows:

Opportunity #1 = \$10,000.00

Opportunity #2 = \$5,000.00

Opportunities Below Threshold = \$7,000.00 (opportunities #3, #4, #5 equal to or below the threshold)

Please note, "blank" threshold value means the threshold feature is not being used. A "0" threshold value indicates the threshold feature is being used and opportunities with negative amounts will fall within the threshold line calculation. In other words, 0 is a valid threshold value since you can have opportunities with negative amounts. If you enter a negative amount in the threshold line, the forecast credit is not split for the won opportunity under the threshold line.

9.7.2 Viewing Opportunities Included in the Forecast

You can view all the opportunities summarized in an opportunity line by clicking the opportunity link. This link takes you to the details of the opportunities that are equal to or below the forecast threshold that you have established.

Navigation

Forecast > Opportunity > Apply > Opportunities below Threshold

Steps

Click the opportunities below the threshold number link in the opportunity column of the threshold line.

Note: If you save and submit an opportunity worksheet using a threshold value, and then change the threshold value, the threshold row is flagged with an indicator and the message "The Threshold Amount has changed since the last submission" appears.

9.7.3 Viewing Threshold History

You can view the history of submitted threshold rows.

Navigation

Forecast > Opportunity > View

Steps

Click the **History View** button on the threshold line in the opportunity worksheet to display the history of submitted threshold rows.

9.7.4 Viewing Subordinate's Threshold Details

If you are a manager, you can view your subordinates forecast threshold details.

Prerequisites

You must be logged in as a manager.

Navigation

Forecast > Opportunity > Apply Opportunity Worksheet Parameters > View Subordinates Submitted Threshold Lines

Steps

Click the **View Subordinates Submitted Threshold Lines** link at the bottom of the page.

You will see a read-only page with opportunity details for your subordinates.

9.8 Product Category Worksheet

Product Category Worksheet is a tool to view your pipeline aggregated into product categories and prepare product level forecasts. Select the filters below and click "Apply". Then update Best Case, Forecast, and Worst Case amounts and click "Save" to save your worksheet. The values you save on this window will appear under the Forecast subtab to assist you in creating your forecast.

9.8.1 Creating Product Level Forecasts Using Product Category Worksheets

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

Note: Percentage is not calculated if using subordinate submitted values to create a worksheet.

Navigation

Forecast > Product Category

Steps

1. From the drop-down list select the Group for which you want to forecast.
2. Select the Period from the drop-down lists.
3. Select the Category from the drop-down list.
4. Select the Credit Type.
5. Click **Apply**.
6. Update Best Case, Forecast, and Worst Case amounts.
7. Click **Save**.

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

9.9 Linking to Compensation

From the Forecast tab, you can view a year-to-date earnings report of your subordinates.

Navigation

Forecast > Compensation

Prerequisites

Oracle Incentive Compensation

Refer to the *Oracle Incentive Compensation User Guide* guide for more information.

Steps

Click the **Compensation** icon in the last column of Subordinates Forecast section. The Year-to-Date Earnings Summary page opens.

In order for the employee number to appear, a salesperson number must be assigned when creating the user.

9.10 Viewing Forecast History

Navigation

Forecast > View Forecast History

Prerequisite

You can view forecast history after they have been saved AND submitted. If you save a forecast without submitting the forecast, you cannot view it within the forecast history.

Steps

Click the **View Forecast History** button to view either worksheet.

9.11 Viewing Product Category History

Product Category history has added filters to view these pages. In previous releases, the history showed you a list of all previously submitted forecasts for all users for a particular product category or opportunity. All records were visible to all sales representatives regardless of sales group structure, forecast period, forecast category, or credit type.

The following filters are used for the Product Category History page:

For a Subordinate:

- Sales Group
- Sales Person
- Period
- Forecast Category
- Credit Type
- Product Category

For a Manager:

- Sales Group
- Period
- Forecast Category
- Credit Type
- Product Category

Additionally, the manager view includes forecast submissions for all sales representatives reporting to the manager.

Steps

You can view the Product Category Worksheet History by following these steps:

1. Click **Product Category Worksheet**.
2. Click **History** to view the history of all previous forecast submissions for this product category.

Please note, for both Product Category and Opportunity Worksheet History, data is not currency converted.

9.12 Viewing Opportunity History

Opportunity history has added filters to view these pages. In previous releases, the history showed you a list of all previously submitted forecasts for all users for a particular product category or opportunity. All records were visible to all sales representatives regardless of sales group structure, forecast period, forecast category, or credit type.

The following filters are used for the Opportunity History page:

For a Subordinate:

- Sales Group
- Sales Person
- Period
- Forecast Category
- Credit Type
- Opportunity

For a Manager:

- Sales Group
- Period
- Forecast Category
- Credit Type
- Opportunity

Additionally, the manager view includes forecast submissions for all sales representatives reporting to the manager.

Steps

You can view the Opportunity Worksheet History by following these steps:

1. Click **Opportunity Worksheet**.
2. Click **History** to view the history of all previous forecast submissions for this opportunity for all periods, groups, and roles, in descending submitted date.

9.13 Forecast Reports

From the Forecast tab, you can view several reports by clicking the Reports subtab. The Forecast Reports subtab is divided into three sections; Forecast Reports, My Reports, and Charts. In My Reports, you can create your own report criteria and save the search with a report name. These reports will appear in My Reports.

The Forecast Reports section includes all the seeded reports:

- **Forecast History Report:** This report shows submitted pipeline and forecast values for the Sales Group submitted by the manager or selected salesperson of the selected group. A link is available to view the submitted opportunity or product category worksheet. If you are logged in with a Manager Role then you can run the report for the group to see submitted data for the group (not all subgroups and members). A manager can only see the salespersons data of their group or subgroup by selecting the group and the salesperson. If you are logged in under a member role then the salesperson field will automatically default and is read-only.
- **Forecast Comparison Report:** This report compares submitted pipeline and forecast values for the salespeople selected. A link is available to drill down to the submitted opportunity or product category worksheet. Please note, only submitted forecasts are included in this report.
- **Forecast Summary Report by Product Category:** The Forecast Summary Report by Product Category is a detailed list of all opportunities which are included in forecasting, based on the forecast date at the opportunity line instead of the close date at the opportunity header level. The opportunity close date appears on the report as part of the opportunity header information, not the line level forecast date.

The threshold functionality for this report has changed. For example, when you choose " ≤ 1000 ", the report will display each opportunity that is less than or equal to 1000, and will rollup all other opportunities into the threshold amount row indicated by "Totals > 1000 " (meaning all others greater than 1000). In forecast worksheet, opportunities less than or equal to 1000, are rolled up into the threshold record.

Opportunities are included in the report based on the sales group selected. The sales group that you select is used as the top level (starting point) for showing opportunities. Selecting a particular worksheet level will show all forecast values for the groups at that level. To filter (reduce) the number of opportunities displayed choose a lower sales group as a starting point.

Select a Worksheet Type from the drop-down list. The drop-down values will display the sales group levels for which the report can be run (for example, Level 1-Group, Level 2-Subordinate, etc.). There is also a "View Groups" link next to the Worksheet Type drop-down to display the groups included in the group level selection. This option is available to managers only.

Under Display Options, the weighted amount is the Total Opportunity Amount multiplied by the Win Probability.

- **Forecast Accuracy Report:** This report provides the historical accuracy of the forecast values for the specified period and sales group/person. Please note, if the Actuals section of the report does not display an amount, you must enter Actuals from the Administration > Sales > Budget/Revenue Entry link.
- **Forecast to Pipeline Summary Report:** This report provides management a way to compare the current period pipeline with a comparison period and generate conversion ratios. Please note, this report uses submitted pipeline numbers.
- **Forecast Summary Report:** This report provides management with the summary of the current forecast in comparison to a particular base period.

It is important to know that if a change is made in the Win Loss Indicator, the concurrent request, as_sales_credit_denorm must be run in "Complete" mode in order for these changes to appear for the accuracy of this report.

The following criteria provides the basis for this report:

Variance from FY Comparison Period Actuals equals YTD Forecast minus FY of the Comparison Period Actuals. Therefore, Variance From FY-01-01 Actuals should be YTD Forecast minus FY-01-01 Actuals = 3999 - 6666 = -2667.

- **Forecast Progression Report:** This report provides the progression of submitted forecasts between the specified dates and for the sales group/person. Please note, if you have selected a forecast period in the future, the Forecast Progression Report will use the last submitted values. For example, if today is January 1, 2003 and you want a Forecast Progression Report for January 1, 2003 to January 31, 2003, your last submitted forecast values will be used to generate the report.
- **Forecast History (Self) Chart:** This chart gives the ability to graph the submitted forecast numbers for a sales person.

- **Forecast History (Subordinates) Chart:** This chart gives a sales manager the ability to graph the submitted forecast numbers for his/her subordinate sales representatives or groups.

Navigation

Forecast > Reports > Link to Report

Filters

Select the filters that your report will be based on. For example, if you want to view a report for the month of October, select the Period Type "Month", and the dates of October 03 to October 03.

Display Options

The display options you select will determine the currency that the report displays, as well as the scale of the numbers. For example, to display your report in US Dollars and Millions of Dollars, select these items from the drop-down lists.

Saving Options

In the Save Report section, click:

- Save: to save the report.
 - Save and Run Report: to run the report and save it. If you select Save, or Save and Run, the indicator is not forced so that the saved query can be configured to use either the "Current" period (moves with time) or the "Indicated" period (fixed).
 - Run Report: to run the report without saving the report. If you select Run Report, the "Always run using indicated period" is set to "Indicated" so that the currently selected period is used to run the report.
 - Select the radio button for "Always using the current period" or "Always run using the indicated period", depending on which you prefer.
3. Select the Display on Home Page button to display the report on your home page.

Please note, if you check the Display on Homepage box, you must go to the **Profiles > Homepage** preferences and select the report to actually display the report on the home page.

Downloading

Click the **Download Report** icon, to download the report to your computer.

10

Customers

Use the Customer tab to manage customers, including organizations, people, and contacts.

Topics included are:

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

10.1 Overview of Customers

There are three party types used in Oracle Field Sales:

- **Person:** Parties of type person are individuals who are customers, rather than an organization. A person can have multiple addresses and telephone numbers.
- **Organization:** An organization party type may be a company, a subsidiary, a branch, an association, a non-profit, or a government branch. Each organization is identified by a primary address.
- **Contact:** A contact is a relationship between a person and a customer. A customer may be an organization, or a person.

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

Access to view, create, or update customer information is governed by the implementation of security settings for the application. Please refer to the *Oracle Field Sales Implementation Guide*, section "Setting Up Users, Security, and Reporting Hierarchy" or "Setting Up Flexible Data Security" for information about these topics.

Duplicate prevention uses matching rules to determine whether the object being created is a duplicate of an existing object. The matching process uses "transformation rules" to take an object and turn it into a "matchable" entity. These transformation rules are set by your System Administrator during implementation. After the transformation rules are performed, the application tells the user if the object is a possible duplicate. For information about duplicate prevention for contacts, people, and organizations, refer to the *Oracle Field Sales Implementation Guide*.

10.2 Organization Subtab

The seeded search, "My Organizations (Sales Team)", displays all organizations for which you are on the sales team.

Topics included are:

- [Section 10.2.1, "Creating Organizations"](#)
- [Section 10.2.2, "Quick Create an Organization"](#)
- [Section 10.2.3, "Updating Organization Details"](#)
- [Section 10.2.4, "Creating Addresses"](#)
- [Section 10.2.5, "Adding Classifications"](#)
- [Section 10.2.6, "Creating Relationships Overview"](#)
- [Section 10.2.7, "Creating an Organization to Organization Relationship"](#)
- [Section 10.2.8, "Creating a Contact Relationship"](#)
- [Section 10.2.9, "Creating Opportunities"](#)
- [Section 10.2.10, "Updating Opportunity Details"](#)
- [Section 10.2.11, "Maintaining Quote Details"](#)
- [Section 10.2.12, "Sending Collateral"](#)

10.2.1 Creating Organizations

Create customers, of party type organization, when the entity is an organization. When you create an organization, you are automatically added to the sales team for that organization.

Prerequisites

OS: Create Organization Privilege: If set to "Yes", user can create organizations.

Navigation

Customer > Organization > Create

Steps

Use the links at the top of the page to navigate directly to a specific section, such as, Address or Contacts.

Organization Profile

In the organization profile section, the External and Internal radio buttons, indicate whether the organization is internal to your business or an external organization.

Address Information

The address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

Contact Information

Type in the partial or full last name of the person and click "Go" to select an existing person to be added as a contact.

You can create new contacts or organization relationships by entering their information in the table shown below.

Organization Relationships

Type in the partial or full organization name and click **Go** to select an existing organization to be added to the table.

Once you have entered all the relevant information, click **Create**.

10.2.2 Quick Create an Organization

This feature provides you with a quick way to create new organizations. The difference between Quick Create and the regular method of organization creation is that Quick Create provides an abbreviated create page, listing only basic information.

Navigation

Customer > Organization > Quick Create

Steps

For creating an organization using this feature, minimal information is required. Enter the required fields, marked with an asterisk, and click **Create**.

10.2.3 Updating Organization Details

Updating organization details helps to keep all sales team members informed about the customer.

Steps

Follow these steps to update details about an existing organization:

1. Navigate to the organization.
2. Add or update information.

Organization Profile

This section is where general information about the organization is kept and updated. This includes the organization name, email address, and phone number.

Company Information

This section includes information specifically about the company. For example, number of employees, SIC code, and DUNS number.

Addresses

Existing addresses are listed. View active or inactive addresses from this section. Create new addresses by clicking the Create address button.

10.2.4 Creating Addresses

To create a new address for this organization:

Steps

1. Click **Create Address**.
2. Select the country from the drop-down list. This field is defaulted based on your selection in the General Profiles. The page will display fields according to the country that you have chosen.

Address Attributes are used to indicate whether the address is Active or Inactive and for what reason. For example, if an organization has moved to a new location, this address may become inactive.

Address Types are used to indicate the type of address is being created. If this is a Bill To address, that can be entered here.

3. Click **OK**.
4. Click **Update**.

10.2.5 Adding Classifications

You can add classifications to an organization, person, or contact.

Navigation

Customer > Organization, Person, or Contact > Classification

Prerequisites

Classifications must be set up from the Administration tab.

Steps

1. Select a Class Category from the drop-down list.
The Class Category determines the Classification Codes you will be able to search.
2. Select a Class Category status from the drop-down list.
3. Click **Apply**.
4. In the "Add a Classification Code Name" field, enter a full or partial code. You can use percent sign (%) as a wild card.

5. Choose a code by checking the "Select" box.
6. Click **Select**.
7. Click **Update**.

You can modify and add data, such as Primary, Start Date, and End Date from this page.

10.2.6 Creating Relationships Overview

In Oracle Field Sales you can create relationships for organizations. Organizations can have two types of relationships: Organization to Organization and Organization to Person. Use Organization to Organization relationships to create relationships between companies, such as, parent and subsidiary, headquarters and division, partner and competitor. Use Organization to Person relationships to create business contact relationships.

10.2.7 Creating an Organization to Organization Relationship

Steps

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

1. Select an existing organization.
2. Click **Relationships**.
3. Click **Add Relationship**.
4. Select the relationship type.
5. Select a start and end date for this relationship, if applicable.
6. Optionally, enter email address and phone number in the fields provided.
7. Select the relationship status from the drop-down list.
8. Enter notes by selecting the note type and status from the drop-down list.
9. Enter the note text in the text box.
10. To relate this note, select the related item type from the drop-down. Enter the name, click **Go**.
11. Click **Create**.

10.2.8 Creating a Contact Relationship

Steps

Follow these steps to create a new contact:

1. Select an existing organization.
2. Click **Relationships**.
3. Click **Add Contact**.
4. Select an existing person. Or click the Create New Person link if you want to create a new person.
5. Select the relationship type between the organization and the person.
Type in the partial or full last name of the person and click **Go** to select a person.
6. Select a start and end date for this relationship, if applicable.
7. Optionally, enter email address and phone number in the fields provided.
8. Select the relationship status from the drop-down list.
9. Optionally, enter mailstop, department, job title, preferred language, manager, department type, and job title type.
10. Indicate whether this person is a decision maker or reference by checking the associated box.
11. Enter notes by selecting the note type and status from the drop-down list.
12. Enter the note text in the text box.
13. To relate this note, select the related item type from the drop-down. Enter the name, click **Go**.
14. Click **Create**.

You can create multiple relationship addresses for a relationship. These addresses are selected from a list of customers and related customer existing addresses. If you change one of these addresses, you must complete this action by going to the customer or related customers record and changing the location there. Please note, the change of address cannot be performed in the relationship record itself.

10.2.9 Creating Opportunities

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

Navigation

Customer > Organization > Opportunities

Steps

Follow these steps to create a new opportunity:

1. Select an organization.

2. Click **Opportunities**.

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

3. Click **Create**.

Include Account Manager Privilege

If a sales representative is an account manager for an organization, then he/she has access to all opportunities created for that organization. The "Include Account Manager Privilege" box is important if the person performing the search is either an account manager OR if someone in their sales hierarchy has the "account manager" privilege assigned to them.

If the "Include Account Manager Privilege" box is selected, the search feature will display all opportunities for which:

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

If the "Include Account Manager Privilege" box is not selected, the search feature will display opportunities for which:

- The user is on the sales team
 - Subordinates are on the sales team
4. The Create Opportunity page opens. Proceed with creating an opportunity.

10.2.10 Updating Opportunity Details

You can update opportunity details directly from the summary table.

Navigation

Customer > Organization > Opportunities

Steps

1. Select an organization.
2. Click **Opportunities**.

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

3. Update information.
4. Click **Update**.

10.2.11 Maintaining Quote Details

From the Customer tab you can view and maintain quote details.

Navigation

Customer > Organization > Quotes

Steps

1. Navigate to the organization.
2. Click **Quotes**.

The Quote Detail page opens.

3. Update quote information.
4. Click **Update**.

For information about using quotes, please refer to the *Oracle HTML Quoting User Guide*.

10.2.12 Sending Collateral

Refer to [Section 10.3.4, "Sending Collateral"](#) for information.

10.3 Person Subtab

The following tasks can be performed from the Person subtab:

- [Section 10.3.1, "Creating a Person"](#)
- [Section 10.3.2, "Updating Person Details"](#)
- [Section 10.3.3, "Adding Classifications"](#)
- [Section 10.3.4, "Sending Collateral"](#)
- [Section 10.3.5, "Creating Relationships"](#)
- [Section 10.3.8, "Creating Opportunities"](#)

10.3.1 Creating a Person

When creating a person it is important to understand that the address style and the required fields are determined by the flexible address settings set up by the System Administrator. For example, an address in the United States will display a different format and require different fields than an address for the United Kingdom.

Prerequisites

OS: Create Person Privilege: If set to "Yes", user can create people.

Steps

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

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

The Create Person page opens.

2. Enter information about the person.
3. Click **Create**.

Steps for Quick Create

1. Click **Quick Create**.

The Quick Create Person page opens.

2. Enter known information.
3. Click **Create**.

10.3.2 Updating Person Details

Keeping person details current is an important part of Oracle Field Sales functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

Steps

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

1. Navigate to the person.
2. Add or update information.

Person Profile

This section is where general information about the person is kept and updated. This includes the name of the person, email address, and phone number.

Additional Information

This section includes such details as date of birth and gender.

Personal Address

The existing addresses are listed. Select to view the active, inactive, or all addresses by using the drop-down. Click the **Create Address** button to create a new address.

Product Interests

Indicate the products that this person is interested in within this section.

Personal Interests

Indicate the personal interests of this person in this section.

Restrictions

Indicate restrictions in contacting this person.

10.3.3 Adding Classifications

You can add classifications to an organization, person, or contact. See [Section 10.2.5, "Adding Classifications"](#)

10.3.4 Sending Collateral

Send collateral to your contacts, including people, using this feature.

This feature is available wherever contacts and people are displayed.

Prerequisites

Fulfillment templates must be set up in the Oracle Marketing Encyclopedia System (MES). Please refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures* guide for more information on setting up fulfillment templates.

Steps

Follow these steps to send collateral:

1. Select a customer, contact or person.
2. Click **Send Collateral**.
The Fulfillment Wizard page opens.
3. Select a Template from the drop-down list.
4. Click **Continue**.
5. Select a Master Document by checking box, click **Continue**.
6. Select Collateral, click **Continue**.
7. Select the Output Method (email) from the drop-down list, and click **Continue**.
The Fulfillment Request Confirmation page opens.
8. Select the Priority from the drop-down list.
9. Click **Done**.

10.3.5 Creating Relationships

In Oracle Field Sales you can create relationships for people as well as organizations. There are two types of relationships for people: Person to Organization and Person to Person Relationships.

10.3.6 Creating Person to Organization Relationship

Steps

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

1. Select an existing person.
2. Click **Relationships**.
3. Click **Add Relationship**.
4. Select an organization for the relationship. Or click the Create New Organization link if you want to create a new organization.
5. Select the relationship type from the drop-down list.
6. Select a start and end date for this relationship, if applicable.
7. Select the relationship status from the drop-down list.
8. For additional information, you can enter details about the person's job and department.
9. Enter notes by selecting the note type and status from the drop-down list.
10. Enter the note text in the text box.
11. To relate this note, select the related item type from the drop-down. Enter the name, click **Go**.
12. Click **Create**.

10.3.7 Creating a Person to Person Relationship

Steps

Follow these steps to create a person to person relationship:

1. Select an existing person.
2. Click **Relationships**.
3. Click **Add Relationship**.
4. Select an existing person. Or click the **Create New Person** link if you want to create a new person.
5. Select the relationship type.
6. Select a start and end date for this relationship, if applicable.
7. Select the relationship status from the drop-down list.
8. Enter notes by selecting the note type and status from the drop-down list.
9. Enter the note text in the text box.
10. To relate this note, select the related item type from the drop-down. Enter the name, click **Go**.
11. Click **Create**.

10.3.8 Creating Opportunities

Navigation

Customer > Person > Opportunities

Steps

Follow these steps to create a new opportunity:

1. Navigate to the person.
2. Click **Opportunities**.
3. Click **Create**.
The Create Opportunity page opens.
4. From this page you can enter opportunity details, purchase items, contacts, and notes information. Required fields are marked with an asterisk.

5. Click **Create.**

If you select the Display Contact Opportunities radio button on the Person Detail Main page shows all opportunities in which this person is a contact on the opportunity. If you select the Display Person Opportunities radio button, you will see all opportunities in which the opportunity is for the person.

10.4 Contacts Subtab

Topics included are:

- [Section 10.4.1, "Creating a Contact"](#)
- [Section 10.4.2, "Maintaining Contact Details"](#)
- [Section 10.4.3, "Adding Classifications"](#)
- [Section 10.4.4, "Sending Collateral"](#)

10.4.1 Creating a Contact

Prerequisites

OS: Create Contact Privilege: If set to "Yes", user can create contacts. If set to "No" user cannot create contacts.

Steps

1. Click **Create**.

The Create Contact page opens. Quick links at the top of the page allow for easy navigation to "Additional Information" or "Notes." The "Return to Top" links allow you to navigate back to the top of the page quickly.

2. Select an existing person and an existing customer.

Type in the full or partial last name of the person and click **Go** to select a person. Select a customer for which the person is a contact.

3. Click the "Create New Person" link if you want to create a new person.
4. Select the relationship type between the person and the customer.
5. Select a Start Date and End Date by clicking the Calendar icon and choosing dates. Start Date will be defaulted to today's date if empty.
6. Enter the Email Address for the contact.
7. Select a Status from the drop-down list of values.
8. For additional information, you can enter details about the person's job and department.
9. Enter notes by selecting the note type and status from the drop-down list.
10. Enter the note text in the text box.

11. To relate this note, select the related item type from the drop-down. Enter the name, click **Go**.
12. Click **Create**.

10.4.2 Maintaining Contact Details

Keeping contact details current is an important part of Oracle Field Sales functionality. By remaining current, these details are available to other sales team members who may view the information at any given time.

Steps

1. Navigate to the contact.
2. Click the relationship link in the summary table.
Contact details consist of the following areas:
 - General Information
 - Personal Addresses
 - Product Interests
 - Personal Interests
 - Restrictions
3. To create a personal address, click the **Create Address** button.
4. To add product interest information, enter the required information directly into the summary table. This includes information about the products that the contact is interested in purchasing. Additional product interests can be added on the lines available on the table. Enter comments for each product interest.
5. To add personal interest information, enter the required information directly into the summary table. This includes personal information about the contact such as, entertainment, hobbies, or sports.
6. To add restrictions, enter information into the fields provided. You can select a Restriction Type, a Start and End Date for the restriction, the reason for the restriction and the Status of the contact. To remove a restriction, click the Erase icon.
7. Click **Update**.

10.4.3 Adding Classifications

You can add classifications to an organization, person, or contact. See [Section 10.2.5, "Adding Classifications"](#).

10.4.4 Sending Collateral

You can send collateral from the contact summary table. See [Section 10.3.4, "Sending Collateral"](#).

10.5 Contact List Subtab

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

Topics included are:

- [Section 10.5.1, "Creating a Contact List Using Filters"](#)
- [Section 10.5.2, "Creating a Contact List by Manually Adding Contacts"](#)
- [Section 10.5.3, "Updating Contact, Customer, and Relationship Details"](#)
- [Section 10.5.4, "Saving a Contact List"](#)
- [Section 10.5.5, "Downloading a Contact List"](#)
- [Section 10.5.6, "Personalizing the Summary Table Display"](#)
- [Section 10.5.7, "Adding Additional Filters to a Contact List"](#)
- [Section 10.5.8, "Viewing List Filters"](#)
- [Section 10.5.9, "Manually Add a Contact to a List"](#)
- [Section 10.5.10, "Removing a Contact From a List"](#)
- [Section 10.5.11, "Removing a List"](#)
- [Section 10.5.12, "Using Call Sheets"](#)
- [Section 10.5.13, "Generating a Call Sheet"](#)
- [Section 10.5.14, "Viewing Call Sheet Details"](#)
- [Section 10.5.15, "Sorting a Call Sheet"](#)
- [Section 10.5.16, "Selecting Multiple Contacts"](#)
- [Section 10.5.17, "Adding a Task"](#)
- [Section 10.5.18, "Sending Collateral"](#)
- [Section 10.5.19, "Viewing Calendar Tasks"](#)

10.5.1 Creating a Contact List Using Filters

Use the following procedure to create a contact list using filters. For example, you can create a contact list for all active contacts within a specific sales group.

Steps

1. Navigate to the Contact List subtab from the Customer tab.
2. Click **Create Contact List**.
3. Enter an identifying name for the list.
4. Select the Public or Private radio button to indicate whether you want to create a private list or a public list that can be accessed by others.
5. Select the "Use Filters to Find Contacts" radio button.
6. Click **Create**.

This takes you to the filters section where you can enter certain criteria to create the contact list. The "List of Filters" page opens.

Use the following filter categories:

a. Contact includes:

General: General information about the contact such as, name, date of birth, phone number.

Relationship: Information about the contacts relationships such as relationship type, role type, department.

Address: Contacts address such as city, state, country, or address status.

b. Classification: How all classifications you choose will be related to one another for the filter. How you want the classification criteria to be related to each other by selecting the "And Condition" or "Or Condition" radio button.

7. After you have selected the filters that you want to choose, click **Apply Filter**.

If you want to clear the filters you have selected, click **Restore**. To quit creating the list and return to the List Summary Page, click **Cancel**. Please note, once you have applied a set of filters to create a list, you cannot refresh this list. You can still apply more filters on this list though. In addition, sales team filters will only appear when you are creating a list from scratch.

A list using the filters you have selected is returned.

10.5.2 Creating a Contact List by Manually Adding Contacts

Use the following procedure to create a contact list by manually adding contacts. This feature allows you to add contacts without using filters.

Steps

1. Navigate to the Contact List subtab from the Customer tab.
2. Click **Create Contact List**.
3. Enter a name that will be used to identify this list.
4. Select the Manually Add Contacts radio button.
5. Click **Create**.
6. In the Add a Contact field, enter the full or partial contact name using percent sign (%) as a wildcard.
7. Click **Go**.
8. From the search results, select the contact you want to add to the list.
9. Click **Select**.
10. Click **Save**.

10.5.3 Updating Contact, Customer, and Relationship Details

Steps

1. Navigate to the Contact List subtab from the Customer tab.
2. Select from your saved lists.
3. Click the link of the item for which you want to make changes.
For example, to update the Contact details, click the link in the Contact column.
4. Click **Save**.

10.5.4 Saving a Contact List

Steps

After you have selected and applied the filters, you have two options in saving the contact list, **Save** or **Save As**.

- If you want to save the file as it is, click **Save**.
- If you want to save the file under a different name, enter the name in the **Save As** text field. Click **Save**.

Additionally, you can indicate whether the list is a public or private list by selecting the **Public** or **Private** radio button. A private list can only be viewed by the list creator. A public list is viewable by any person who has access to the contacts on the list. A public list cannot be changed by another user.

When saving contact lists, please note that the contact lists that you create (either public or private) must have unique names. However, another user can create a public contact list with the same name as your contact list.

10.5.5 Downloading a Contact List

You can download a contact list to a spreadsheet by clicking the **Download to CSV**.

10.5.6 Personalizing the Summary Table Display

You can personalize the way the summary table is displayed on the page by clicking the **Personalize** icon.

Steps

1. Navigate to the Contact List subtab from the Customer tab.
2. Click the **Personalize** icon.
The Personalize Contact List page opens.
3. Select the items you want to display on the page by moving **Available Columns** to the **Display Columns** area.
4. Select sorting options.
5. Enter the number of rows to display.
6. Click **Apply**.

10.5.7 Adding Additional Filters to a Contact List

After you have applied an initial set of filters and created a contact list, or you have created a contact list manually, you can add additional filters to the contact list to further narrow down the list.

Prerequisites

You must be the owner of the list in order to modify the list. If you are not the owner, the list you create will be a new list based on the existing list.

Steps

1. Navigate to the Contact List subtab from the Customer tab.
2. Click **Apply Filters**.

The "List of Filters" page opens. In the Filters section you can enter criteria to create the contact list.

Use the following filter categories:

- a. Contact includes:

General: General information about the contact such as, name, date of birth, phone number.

Relationship: Information about the contacts relationships such as relationship type, role type, department.

Address: Contacts address such as city, state, country, or address status.

- b. Classification: How all classifications you choose will be related to one another for the filter. How you want the classification criteria to be related to each other by selecting the "And Condition" or "Or Condition" radio button.
3. After you have selected the filters that you want to choose, click **Apply Filter**.
 4. If you want to clear the filters you have selected, click **Restore**. To quit adding filters to the list and return to the Contact List Page, click **Cancel**.

10.5.8 Viewing List Filters

You can view the filters you have applied to a list two ways.

- From the summary table your saved lists are displayed. Click the **View** link under the List Filters column.
- After you have created a new list, you can view the filters from the contact list page by clicking the **List Properties** link. The view-only page shows the filters that you used for the list and the date the filters were applied.

10.5.9 Manually Add a Contact to a List

After you have created a contact list, you can manually add contacts to the list.

Prerequisites

You must be the owner of the list.

Steps

1. Navigate to the Contact List subtab from the Customer tab.
2. In the Add a Contact field, enter the name of the contact you want to add. Use the percent sign (%) as a wild card.
3. Click **Go**.
4. Select a contact from the search results.

10.5.10 Removing a Contact From a List

Navigation

Customer > Contact List

To remove a contact from a list, open the list from the summary table. Check the Remove box and click **Update**.

10.5.11 Removing a List

Navigation

Customer > Contact List

To remove an entire list from your summary table, check the Remove box. Click **Update**.

10.5.12 Using Call Sheets

After you have created a list, you may want to generate a call sheet. A call sheet has additional information on your contacts provided through an interactive page.

Overview

A Call Sheet is page which provides a unique view of the contacts on your contact list. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to customers.

Topics included are:

- [Section 10.5.13, "Generating a Call Sheet"](#)
- [Section 10.5.14, "Viewing Call Sheet Details"](#)
- [Section 10.5.15, "Sorting a Call Sheet"](#)
- [Section 10.5.16, "Selecting Multiple Contacts"](#)
- [Section 10.5.17, "Adding a Task"](#)
- [Section 10.5.18, "Sending Collateral"](#)
- [Section 10.5.19, "Viewing Calendar Tasks"](#)
- [Section 10.5.20, "Updating Contact, Customer, and Relationship Details"](#)

10.5.13 Generating a Call Sheet

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. "Executing a Call Sheet" refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click the **Generate Call Sheet** button.

The application will display information about the contacts. To remove contacts from the call sheet, check the "Remove" box and click **Update**.

10.5.14 Viewing Call Sheet Details

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.

A Call Sheet is a list of people to contact. It is generated based on contacts that appear in a user's Contact List. You may perform several actions as you contact the people on your Call Sheet and log interactions based on the actions taken. Executing a Call Sheet refers to the act of contacting those people in the Call Sheet, and conducting actions that are related to the clients.

The calendar lists tasks for a contact, one check mark means there is one existing task, a double check mark means there are multiple tasks, and a cross mark means there are no existing tasks for the contact.

10.5.15 Sorting a Call Sheet

You can view the call sheet with the basic view which lists contacts grouped by client.

Navigation

Customer > Contact List > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.

10.5.16 Selecting Multiple Contacts

Navigation

Customer > Contact List > Select a contact list > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. To select multiple clients, select each client by checking the Select box in the first column of the client's row on the call sheet.

You can also use the "Select All" link to select all contacts on the current page or "Select None" link to select none, links at the bottom of the page.

10.5.17 Adding a Task

Steps for Alternative 1

Use this alternative to create the same task for multiple contacts.

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Select the client by checking the Select box in the first column of the client's row on the call sheet.
4. From the drop-down of the Select Client and Perform Action list, select Create Task.
5. Click **Go**.
6. Enter the information for the task you are creating. Most fields will default to match the settings you have already done. Required fields are indicated with an asterisk.
7. Click **Create**.

The **Create** and **Create Another** button commit changes in this window and forward this page to the Create Task and Task Summary page for you to create another task.

Steps for Alternative 2

Use this alternative to create a task for one contact at a time.

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click the Edit icon on the call sheet.

Steps for Alternative 3

Use this alternative to create a task for one contact with the date defaulted to the date for which the calendar indicates.

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Click an icon on the weekly calendar on the call sheet.

10.5.18 Sending Collateral

You can send collateral material from a call sheet.

Navigation

Customer > Contact List > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. From the drop-down list, select Send Collateral.
4. Choose the Select box to indicate the contacts for which you want to send collateral.
5. Click **Go**.

10.5.19 Viewing Calendar Tasks

Navigation

Customer > Contact List > Generate Call Sheet

Steps

1. Select a contact list.
2. Click **Generate Call Sheet**.
3. Tasks are listed in the far right column with a check mark. To view, edit, or add a task, click the check mark, double check mark, or cross mark.
4. The Create Task page opens. At the bottom of the page, all tasks are listed with a link to the details.
5. Tasks created for contact list are visible to the owner of the task in the calendar.

10.5.20 Updating Contact, Customer, and Relationship Details

Navigation

Customer > Contact List > Call Sheet

Steps

Select the information that you want to update by clicking the related link. For example, to update the Contact details, click the link in the Contact column.

Save your changes.

10.6 Customer Reports

From the Customer tab, you can view customer reports by clicking the Reports subtab.

Available Reports

- **Customer Classification Report:** This report will return all parties within the chosen party type that meet the classification criteria selected.
- **Task Classification Report:** This report will return all parties within the chosen party type and tasks associated with those parties that meet the classification criteria selected.

Navigation

Customer > Reports > Link to Report

Steps

1. Select filters.
2. Select the display options by moving items from the Available Columns list into the Displayed Columns list. Click the > button.

To move all available columns into the display columns section click the >> button.

3. In the Save Report section, click:
 - **Save:** to save the report.
 - **Run Report:** to run the report without saving the report.

Sales Teams

Use the sales team functionality to manage members of your sales teams.

Topics included are:

- [Section 11.1, "Overview of Sales Teams"](#)
- [Section 11.2, "Adding an Internal Sales Team Member"](#)
- [Section 11.3, "Adding a Resource Team to a Sales Team"](#)
- [Section 11.4, "Adding a Partner to a Sales Team"](#)

11.1 Overview of Sales Teams

A sales team is a set of salespeople, assigned manually or automatically, to a party using Territory Management. The ability to access, view, or update a customer can be based on sales team membership. Sales team members can have "full access" or "view only" ownership.

The sales team is divided into two sections:

- **Internal:** salespeople or internal users.
- **External:** partners and partner users.

Partner and partner contacts can be added to the external sales team of an organization, lead, or opportunity if:

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

Related Profiles

OS: Always Put Creator on Sales Team

When a salesperson has sales team access to customer records, the creator of the record is always added to the sales team. If a salesperson has full/prospecting access, then the profile "OS: Always Put Creator on Sales Team", is used to decide whether the salesperson is added to the customer sales team. If the profile is set to "Yes", then the salesperson is added to the sales team. If set to "No", the user is not added to the sales team.

11.2 Adding an Internal Sales Team Member

Use these procedures to add an internal sales team member, including salespeople and internal users.

Steps

1. Navigate to **Sales Team**.
2. Click **Internal**.
3. Enter the last name or partial name of the sales representative in the Add a Salesperson field, click **Go**.
4. Check the Select box.
5. Click **Select**.

The salesperson will be added to the Sales Team summary table.

6. Select a Role from the drop-down list.
You can view the email address and phone number for this salesperson.
7. Click **Update**.

11.3 Adding a Resource Team to a Sales Team

Use these procedures to add resource team to sales teams. Resource teams can be added to internal sales teams only.

Steps

1. Navigate to **Sales Team**.
2. Click **Internal**.
3. In the Add a Resource Team field, enter the resource name or the wildcard percent sign (%) and click **Go**.
4. Select a resource from the search results page by clicking the link.
5. Click **Update**.

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

11.4 Adding a Partner to a Sales Team

Use these procedures to add partners, external sales team members, to sales teams.

Steps

1. Navigate to Sales Team.
2. Click **External**.
3. Enter the partner name in the Add a Partner field, click **Go**.
4. Select a partner from the search results page by clicking the link.
5. To add a partner contact, enter the partner contact name and click **Go**.
6. Click **Update**.
7. To remove a partner, check the Remove box and click **Update**.

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

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

12

360 Degree View

The 360 degree view allows users to browse orders, invoices, returns, products, and the service requests details of a customer.

Topics included are:

- [Section 12.1, "Overview of 360 Degree View"](#)
- [Section 12.2, "Viewing 360 Degree View"](#)

12.1 Overview of 360 Degree View

View the following items, related to a customer, through the 360 degree view:

- **Orders:** Provides information of orders entered and process, including shipping and billing addresses, and actual price information. It is important for a salesperson to understand the order history of the customer to assist in current and future sales. This is populated from Order Management.
- **Invoices:** Shows the invoice and payment history related to the customer's orders. If a customer has outstanding payments, it may not be the best time to attempt another sale. This is populated from Oracle Accounts Receivables.
- **Service Requests:** A tracking of issues reported on the products purchased. This provides the salesperson a sense of customer satisfaction and can help decide how to interact with the customer. This is populated from Oracle Service.
- **Products:** This view provides a list of product purchased by the customer. This is populated from Oracle Accounts Receivables.
- **Returns:** Displays a list of returned products, with the amount and date of the return. This is another indication of customer satisfaction. This is populated from Oracle Order Management.
- **Projects:** You can view the projects for the associated customer organization or person. Drill down to view the project details.
- **Campaigns:** Provides a list of campaigns the customer has been a part of. This is populated from Oracle Marketing.
- **Events:** A list of events onto which the customer has enrolled. This is populated from Oracle Marketing.

12.2 Viewing 360 Degree View

Navigation

Customer > Organization or Person > 360 View

Steps

Follow these steps to use 360 degree view:

1. Navigate to the organization or person.
2. Click **360 View**.
3. Click a link to view the details of any available item.

13

Accounts

Accounts are used to track and report financial transactions.

Topics included are:

- [Section 13.1, "Overview of Accounts"](#)
- [Section 13.2, "Creating Accounts"](#)
- [Section 13.3, "Updating Account Details"](#)
- [Section 13.4, "Viewing Account Sites"](#)
- [Section 13.5, "Adding an Account Site"](#)
- [Section 13.6, "Viewing Account Roles"](#)
- [Section 13.7, "Viewing Account Relationships"](#)

13.1 Overview of Accounts

Whenever a customer places an order, an invoice is created, or a payment made, the transactions are posted against the customer's account.

Only valid addresses that satisfy the address validation rules that you have set up within Oracle Accounts Receivable can be used as account sites. Those that are not valid will display with a "lock" icon and cannot be used to create account sites.

13.2 Creating Accounts

Create an account when a financial transaction takes place for a given customer.

Steps

Follow these steps to create an account:

1. Navigate to the organization.
2. Click **Accounts**.

The Account Summary page opens with all accounts that exist for the Organization or Person.

3. Click **Create**.

The Create Account page opens.

4. Click **Create**.

13.3 Updating Account Details

Update account details when a customer's account information has changed.

Steps

Follow these steps to view an account:

1. Navigate to the organization.
2. Click **Accounts**.
3. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
4. Edit information.
5. Click **Update**.

13.4 Viewing Account Sites

Steps

Follow these steps to view an account site:

1. Navigate to the organization.
2. Click **Accounts**.
3. Select an account from the summary table by clicking the account's link.
The Account Detail page opens.
4. Click **Sites**.

13.5 Adding an Account Site

Steps

Follow these steps to add an account site:

1. Click **Add Site**.
2. Select an address.
 - Change the Site Use by selecting from the drop-down list
 - Check the Primary box, if applicable
 - Change the Site Status by selecting from the drop-down list
3. Click **Create**.

13.6 Viewing Account Roles

Steps

Follow these steps to view an account role:

1. Navigate to the organization.
2. Click **Accounts**.
3. Select an account from the summary table by clicking the account's link.

The Account Detail page opens.
4. Click **Roles**.
 - a. To add a role, select person or organization from the Add drop-down list. Enter the full or partial item name using percent sign (%) as a wildcard.
 - b. Click **Go**.
 - c. To remove a role, locate the related account and click the Erase icon.
 - d. To change the role type, select from the drop-down list.
 - e. To indicate a primary role, select the Primary Role radio button.
 - f. To change the status, select from the drop-down list.
 - g. To find an address, enter the full or partial address using percent sign (%) as a wildcard.

Notes, Tasks, and Attachments

Oracle Field Sales uses the notes, tasks, and attachments functionality of Oracle Common Application Components.

Topics included are:

- [Section 14.1, "Overview of Notes, Tasks, and Attachments"](#)
- [Section 14.2, "Creating Notes"](#)
- [Section 14.3, "Viewing Notes"](#)
- [Section 14.4, "Viewing Note History"](#)
- [Section 14.5, "Creating Tasks"](#)
- [Section 14.6, "Adding an Attachment to a Task"](#)
- [Section 14.7, "Updating Tasks"](#)
- [Section 14.8, "Creating Attachments"](#)
- [Section 14.9, "Viewing Attachments"](#)

14.1 Overview of Notes, Tasks, and Attachments

Notes are free form text fields that you can use to record information about customers, opportunities, leads, and forecasts. This information can be viewed by any user who has access to the customer, opportunity, lead, or forecast.

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

Attachments are documents, URLs, or text. The most common use of attachments is for sharing and storing information about a customer. For example, attach a press release about a customer for future reference.

For additional information, please refer to the *Oracle Common Application Components User Guide*.

14.2 Creating Notes

Follow these steps to create a note:

Steps

1. Click **Notes**.
2. Click **Create**.
3. Select the note Type from the drop-down list.
4. Select the note Status from the drop-down list.
5. Enter the note text in the text box.
6. To relate this note to a party, enter Type and Name information.
7. Click **Create**.

14.3 Viewing Notes

Follow these steps to view a note:

Steps

1. Click **Notes**.
2. Select a Type from the drop-down list.
The default type can be changed using Profiles.
3. Choose the number of days for which you want the notes history.
4. Click **Apply**.
5. To view the full text of the note, click the icon in the Text table column located in the Notes History table.
6. To view all note in a printable version, click **All Notes**.

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

14.4 Viewing Note History

To view a note's history:

Steps

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

14.5 Creating Tasks

To create a task:

Steps

1. Click **Tasks**.
2. Click **Create**.
3. Enter task details.
4. Click **Update**.

14.6 Adding an Attachment to a Task

Follow these steps to add an attachment to your task:

Steps

1. Click **Attachments**.
2. Click **Add**.
The **Add Attachment** page opens.
3. Enter a description, and choose a **Text**, **File**, or **URL** attachment.
4. On your desktop, click **Browse** to search for a file to attach.
5. Click **Create**.

14.7 Updating Tasks

Maintain current information in your tasks by updating task details.

Steps

1. Click **Tasks**.
2. Add or update information. For example, if the date a task is due changes
3. Click **Update**.

14.8 Creating Attachments

Follow these steps to create an attachment:

Steps

1. Click the **Attachments** link.
2. Click **Create**.
3. Enter a description.
4. Select a file, enter text, or enter the URL to attach.
5. Click **Create**.

14.9 Viewing Attachments

Steps

Click the attachment link to view the attachment details.

15

Interactions

Oracle Field Sales uses the functionality provided by Oracle Common Application Components to view interactions.

Topics included are:

- [Section 15.1, "Overview of Interactions"](#)
- [Section 15.1.1, "Viewing Interactions"](#)

15.1 Overview of Interactions

An interaction is a touch point with the customer and may relate to campaigns, events, agents, orders, and quotes. This point of contact could be a direct interaction with a customer, the customer's system, a potential customer, or through an automated agent. An interaction is generally timed and has an outcome or result that can be tracked. Multiple activities can occur during the course of a customer interaction.

Note: Oracle Field Sales users cannot create or edit interactions.

For more detailed information about interactions, please refer to the *Oracle Common Application Components User Guide*.

15.1.1 Viewing Interactions

View interactions entered by sales, marketing, and service department representatives.

Steps

1. Click **Interactions**.
2. You can select filters such as Media Type, Activity, Source, and Date Ranges.
3. Click **Apply**.

16

Proposals

Oracle Field Sales uses the proposals functionality of Oracle Proposals.

Topics included are:

- [Section 16.1, "Overview of Proposals"](#)

16.1 Overview of Proposals

A proposal can be created directly from an opportunity or from a quote.

An example for Oracle Field Sales:

- A sales representative is working on an opportunity for XYZ, Inc.
- XYZ, Inc. requests a proposal be mailed to them.
- The sales representative generates the proposal based on the opportunity details. Information from the opportunity is defaulted into the proposal template.
- The proposal is printed and mailed directly to XYZ, Inc.
- The sales representative is able to view all proposals generated for that opportunity.

Refer to the *Oracle Proposals Online User Guide* guide for information.

17

Partners

Oracle Field Sales uses the partner functionality of Oracle Partners Online.

Topics included are:

- [Section 17.1, "Overview of Partners"](#)

17.1 Overview of Partners

A partner is any type of alliance or strategic agreement between one entity and another. From the Partner tab, you can create new partners and maintain the details of existing partners. Once a partner is created, it can be added to an external sales team.

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

18

Compensation

Oracle Field Sales uses the compensation functionality of Oracle Incentive Compensation to manage compensation plans.

Topics included are:

- [Section 18.1, "Overview of Compensation"](#)

18.1 Overview of Compensation

Oracle Incentive Compensation provides a unique online application for the design, distribution, and administration of variable compensation plans. A typical compensation plan consists of one or more modular components, or plan elements.

There are three types of payment:

- Regular Payment: The application collects data, prepares it, and formats it to be used by a non-Oracle Payable system.
- Accounts Payable Integration: Used for vendors, this method prepares payment for Oracle Accounts Payable by classifying the resources as suppliers.
- Payroll Download File: The application collects data and creates a file that can be used by Oracle Payroll

In addition to timely and accurate transaction processing, Oracle Incentive Compensation serves as a feedback mechanism for the sales organization and management through compensation and performance reports.

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

19

Fulfillment

Oracle Field Sales uses Oracle 1-to-1 Fulfillment to send sales and marketing related collateral, fulfillments, and campaign material to prospective customers.

Topics included are:

- [Section 19.1, "Overview of Fulfillment"](#)
- [Section 19.2, "Sending Collateral from the Customer Tab"](#)
- [Section 19.3, "Sending Collateral from the Fulfillment Tab"](#)

19.1 Overview of Fulfillment

Oracle 1-to-1 Fulfillment is a framework for compiling and distributing fulfillment information to customers in an electronic format. Fulfillment provides an automated method of sending information such as generic collateral or personalized cover letters to customers. It provides the ability to immediately satisfy a customer's requests for information, literature, and other correspondence.

19.2 Sending Collateral from the Customer Tab

Prerequisites

Collateral is setup in Oracle Marketing Online as a deliverable before using Fulfillment in Oracle Field Sales. Fulfillment templates must be set up in Oracle Marketing Online.

Refer to the *Oracle Marketing Online User Guide* for more information on setting up fulfillment templates.

Steps

1. Navigate to the Person subtab.
2. Select the recipients to which you want to send collateral.
3. Click **Send Collateral**.
The Fulfillment Wizard page opens.
4. Select a Template from the drop-down list.
5. Click **Continue**.
6. Select a Master Document by checking the box, click **Continue**.
7. Select Collateral, click **Continue**.
8. Select the Output Method (email) from the drop-down list, and click **Continue**.
The Fulfillment Request Confirmation page opens.
9. Select the Priority from the drop-down list, and click **Done**.

19.3 Sending Collateral from the Fulfillment Tab

While using Fulfillment, you can send collateral to a party of type person.

Steps

1. Navigate to the Status subtab.
2. Click **Create**.
3. Enter Person Search criteria, click **Search**.
4. Click **Send Collateral**.

The Fulfillment Wizard page opens.

5. Select a Template from the drop-down list.
6. Click **Continue**.
7. Select a Master Document by checking the box, click **Continue**.
8. Select Collateral, click **Continue**.
9. Select the Output Method (email) from the drop-down list, and click **Continue**.

The Fulfillment Request Confirmation page opens.

10. Select the Priority from the drop-down list, and click **Done**.

Administration

The Administration tab is used by System Administrators to manage tasks and functions that impact the overall application.

Topics included are:

- [Section 20.1, "Overview of Administration"](#)
- [Section 20.2, "General Administration"](#)
- [Section 20.3, "Sales Administration"](#)
- [Section 20.4, "Access Administration"](#)
- [Section 20.5, "Leads Administration"](#)
- [Section 20.6, "Resource Administration"](#)
- [Section 20.7, "Adding a Custom Report to Report Listings"](#)
- [Section 20.8, "Excluding Tabs and Functions"](#)
- [Section 20.9, "Updating Job Title Type and Department Type LOV"](#)
- [Section 20.10, "Administering Personalization and Saved Searches"](#)

20.1 Overview of Administration

The Administration tab consists of four subtabs: General, Sales, Resources, and Leads. With the Oracle Sales Administrator role, you have access to these tabs to edit information that influences the way the application works.

From the Resources subtab, you can manage Employees, Groups, and Roles.

Refer to the *Oracle CRM Foundation Application Implementation Guide* and *Oracle CRM Foundation Application User Guide*.

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

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

20.2 General Administration

General administration includes the Globalization section. See the following topics for information on setting up these functions.

- [Section 20.2.1, "Customer Administration"](#)
- [Section 20.2.1.1, "Classification"](#)
- [Section 20.2.1.2, "Relationship"](#)
- [Section 20.2.2, "Globalization"](#)
- [Section 20.2.3, "Calendar Type"](#)
- [Section 20.2.4, "Accounting Calendar"](#)
- [Section 20.2.5, "Type Mapping"](#)
- [Section 20.2.6, "Create a New Type Mapping"](#)
- [Section 20.2.7, "Period Rate"](#)
- [Section 20.2.8, "GL Daily Rate"](#)
- [Section 20.2.9, "Transaction Calendar"](#)

20.2.1 Customer Administration

From the Customer Administration section, you can manage classifications and relationships.

- [Section 20.2.1.1, "Classification"](#)
- [Section 20.2.1.2, "Relationship"](#)

20.2.1.1 Classification

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

Note: Sales applications support only one level of classifications. They do not support classification hierarchies.

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

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

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

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

Prerequisites

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

The user interface permits you to enter complex hierarchical classifications, but the hierarchy is not displayed. You must know the parents and children of each classification node in the tree before you can input them.

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

Navigation

Administration > General > Customer Administration > Classification

Steps

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

1. Click **Create**.

The Create Classification page appears.

2. Enter a name for your classification scheme in Class.
3. Select one or more check boxes which represent the rules that will govern the relationships between the different nodes in your classification scheme hierarchy. The available rules are:
 - **Allow Multiple Parents:** Selecting this check box means that any node in your hierarchy can have more than one parent. Leaving this check box unselected permits only one parent.
 - **Allow Leaf Nodes Only:** Restricts you to assigning only the leaf nodes of any class code hierarchy. This means only those codes that have no children. Leaving this check box unselected means that you can use any class codes for this class category.
 - **Allow Multiple Assignments:** Selecting this check box permits sales application agents to classify a customer, an opportunity, or other object using more than one code from the class category you are creating. Leaving this check box unselected restricts agents to using only one code.

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

The Class Detail page appears. You are now ready to create the classification codes for the classification you have created.

8. Click **Classification Codes**.

The Classifications page appears.

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

10. Click **Update**.

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

This is done by adding child codes, so you must start at the top of the hierarchy and work your way down.

11. To create a classification hierarchy of the classification codes, then, for each code:

- a. Click on the link in the Code column.

The Classification Detail page appears.

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

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

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

The Select Class Code page appears listing the results of your search. You can keep this page open and use the search at the top to search for additional source codes.
- d. Select the Select check boxes for any codes you wish to add as children.
- e. Click **Go**.

The Classification Detail page appears. The Child Code column now lists the child nodes you have selected.
- f. Enter the required Start Date for each child node. You can use the date button to select the date from the calendar.
- g. Click **Update**.

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

20.2.1.2 Relationship

Reference

Oracle Trading Community Architecture Relationship Manager User Guide

Applies to: Field Sales, TeleSales

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

You can:

- Modify or add to the list of relationships.
- Specify where these relationships can be used and set up any reciprocal relationships.
- Set up non-reciprocal relationships.

About Relationships in Sales Applications

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

- Business relationships between two individuals, such as "reports to".
- Personal relationships between two individuals, such as "parent of" and "child of".
- Relationships between individuals and organizations, such as "employee of" and "manager of".
- Relationships between different organizations, such as "subsidiary of".
- Relationships between outside organizations and your own internal organizations. For example, "competitor of".

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

A relationship consists of:

1. An entry in the Oracle Receivables extensible lookup Party Relations Type. The lookup code entered here includes the meaning the user sees in the list of values for Subject Code and Object Code when you set up reciprocal relationships.
2. An entry in the Oracle Receivables extensible lookup TCA Relationship Roles. The lookup code entered here includes the meaning the user sees in the list of values for Subject Role and Object Role when you set up reciprocal relationships.
3. Setup for each relationship using the administration user interface. This setup includes:
 - Specification of where the relationship can be used (organization or person).
 - Any reciprocal relationship the application is to capture when a user selects the relationship.

Relationship Subjects, Objects, and Party Types

All relationships have a subject and an object. For example, in the relationship "father of", the father is the subject. The child is the object. The subject and the object can be of the same or different party types. In the case of "father of", both

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

About Setting Up the Automatic Capture of Reciprocal Relationships

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

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

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

Relationship Role

The 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*.

20.2.1.3 Modifying Seeded Relationship Codes

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

- Modify the wording of the relationship in the Meaning column. This will change what the user sees in the sales application user interface.

- Add relationships of your own. If you add new relationships to this lookup, you must remember to set up their usage according to the procedure described in "Setting Up Reciprocal Relationships". If you do not, they will not be available for use.

The following table lists all of the seeded relationship codes for the lookup *Party Relations Type* with an explanation for each:

Code	Explanation
ADVERTISER	Advertiser
AFFILIATE_TO	Affiliate
AGREEMENT_SIGNER_OF	The party that signs agreements on behalf of another party
AUNT_OF	Aunt
BENEFICIARY_OF	Beneficiary
BILL_CONSOLIDATOR_FOR	Bill Consolidator For
BILL_CONSOLIDATOR_AT	Bill Consolidator At
BILL_PRESENTER_FOR	Bill Presenter For
BILL_PUBLISHER_AT	Bill Publisher At
BILL_PUBLISHER_FOR	Bill Publisher For
BILLER_AT	When an organization is a registered biller.
BILLER_FOR	Biller For
BILLTO_OF	The alternate billing party for the buyer.
BOARD_MEMBER_OF	Board Member
BROTHER_OF	Brother
BUSINESS_PARTNER_FOR	Business Partner
CEO_OF	CEO
CFO_OF	CFO
CHANNEL_FOR	Channel
CIO_OF	CIO
COMPETITOR_OF	Competitor
CONSULTANT_FOR	Consultant

Code	Explanation
CONTACT_OF	Contact
COUSION_OF	Cousin
CUSTOMER_OF	Customer
DAUGHTER_OF	Daughter
DEPENDENT_OF	Dependent
DIVISION_OF	Division
DOMESTIC_ULTIMATE_OF	Domestic Ultimate of
EMPLOYEE_OF	Employee
FATHER_OF	Father
FIELD_SERVICE_PROVIDER_FOR	Field Service Provider
GENERAL_EMPLOYEE_OF	General Employee
GLOBAL_ULTIMATE_OF	Global Ultimate of
GUARANTOR_FOR	Guarantor
GUARDIAN_OF	Guardian
HEADQUARTERS_OF	Headquarters of
KEY_DECISION_MAKER_FOR	Key Decision Maker
LEGAL_COUNSEL_FOR	Legal Counsel
MEMBER_OF	Member
MOTHER_OF	Mother
OWNED_BY	Owned
PARENT_OF	Parent
PARTNER_OF	Partner
PARENT_OF	Parent
PAYFROM_OF	The alternate party to pay for a buyer.
PAYTO_OF	The alternate payee name for the seller.
PUBLISHER	Publisher
REPAIR_DEPOT_PROVIDER_FOR	Repair Depot Provider
REPORTS_TO	Reports To
SELLER_FOR	Seller

Code	Explanation
SELLER_FOR	Seller
SHIPTO_OF	The alternate shipping party for the buyer
SIBLING_OF	Sibling
SISTER_OF	Sister
SON_OF	Son
SPOUSE_OF	Spouse
STOCK HOLDER_OF	Stock Holder
STUDENT_OF	Student
SUBSIDIARY_OF	Subsidiary
UNCLE_OF	Uncle
VENDOR_OF	Vendor

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

20.2.1.4 Setting Up Reciprocal Relationships

Use this procedure to create a reciprocal relationship.

Prerequisites

Relationship Codes exist in the Oracle Receivables extensible lookup Party Relations Type

Relationship Roles exist in the Oracle Receivables extensible lookup TCA Relationship Roles

HTML Navigation

Administration > General > Customer Administration > Relationship

Responsibility

Sales Online Super User

Steps

On the Relationship Types page, the Relationships table lists the current relationships already created.

1. Click **Create**.

The Create Relationship page opens.

2. Enter the name for the reciprocal relationship in the Relationship Type field. This name is for implementer use only. It helps you identify the set up you are creating and is not visible to users of sales applications.
3. Using the Directional Code drop-down list, select either **Parent** or **Child**. It does not matter which of the two relationships you decide to create. The reverse relationship also gets created.

For example, you can choose the Parent direction and create *father of* for the subject and *son of* for the object. Or choose Child for Direction and create *son of* for the subject and *father of* for the object. In both cases, both relationships are created.

4. Make sure the Enabled box is selected. This is required.
5. Using the Subject Name drop-down list, select the party to which this relationship setup applies. For example, for the relationship "Member of," select Person. Valid parties for sales applications are: Person and Organization.
6. Using the Subject Code drop-down list, select a relationship code.
7. Using the Subject Role drop-down list, select the relationship role for the subject. Relationship roles appear in the Sales user interfaces.
8. Using the Object Name drop-down list, select the party that can be the object of this relationship. For example, for the relationship *employee of*, select Organization because people are employees of organizations. Valid parties for sales applications are: Person and Organization.
9. Using the Object Code drop-down list, select a relationship code. This is where you choose the reciprocal relationship code. If the person is the *employee of* the organization, then the organization is the *employer of* for this object code.
10. Using the Object Role drop-down list, select the relationship role for the object. This is the reciprocal role.
11. Click **Create**.

Two relationships are created and you can view them in the Relationship Types page.

20.2.1.5 Setting Up Non-Reciprocal Relationships

Steps

1. Enter the name of the relationship setup you are creating in the Relationship Type field. This name is for implementer use only. It helps you identify the setup you are creating. It is not visible to users of sales applications.
2. Select **Non Directional** for the Directional Code.
3. Make sure the Enabled box is selected. This is required.
4. Using the Subject Name drop-down list, select the party to which this relationship setup applies. Valid parties for sales applications are: Person and Organization.
5. Using the Subject Code drop-down list, select a relationship code.
6. Using the Subject Role drop-down list, select the relationship role for the subject. Relationship roles appear in the Sales user interfaces.
7. Using the Object Name drop-down list, select the party that can be the object of this relationship. Valid parties for sales applications are: Person and Organization.
8. Using the Object Code drop-down list, select the same relationship code.
9. Using the Object Role drop-down list, select the same role as you selected for the subject.
10. Click **Create**.

One non-reciprocal relationship is created.

20.2.1.6 Seeded Relationship Roles

Each row of the following table consists of the following columns.

- **Subject Role:** The role is created in the Lookup *TCA Relationship Roles*. The role the subject has in relation to the object. An example in the table is *Employers*. Vision Corporation has the role of *Employers* in relation to the employee Joe.

- **Subject Code:** This is the relationship phrase from the Lookup *Party Relations Type* that is used to show the directional relationship. Vision Corporation is the *Employer Of* Joe.
- **Subject Name:** This specifies which party type can be the subject of the relationship. For example, for the *Member of* relationship, the entry in this column is *Person*. This means that agents or sales people can only use this relationship for parties of *Person*. Users recording a relationship for organizations will not see "Member of" in the list of values. For *Employer Of* the subject name is *Organization*.
- **Object Code:** This is the relationship from the Lookup *Party Relations Type* that is used to show the directional relationship. The object code becomes the subject code in the reciprocal relationship. Joe is the *Employee Of* Vision Corporation.
- **Object Name:** This specifies which party type can be the object of the relationship. For example, for the "Member of" relationship, the entry in this column is *Organization*. This means that agents or salespeople can only use this relationship between *Persons* and *Organizations*. Users recording a relationship between two organizations or between two persons will not see "Member of" in the list of values. The object name becomes the subject name in the reciprocal relationship. The object name for *Employee Of* is *Person*.
- **Object Role/Reverse Role:** The role is created in the Lookup *TCA Relationship Roles*. The role for the object becomes the role for the subject in the reciprocal relationship. The object role for Joe is *Employees*. The column says Non-Directional for roles that do not have a parent/child relationship. The object role in that case is the same as the subject role.
- **Type:** The relationship type is assigned by the administrator when creating a pair of relationships and categorizes a set of relationships. The relationship type for the example is *Employment*.

The following table lists all seeded relationship roles including reciprocal relationships.

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Accredited Organizations	Accredited By	Organization	Accredits	Organization	Accrediting Organizations	Inst_Accreditation
Accrediting Organizations	Accredits	Organization	Accredited By	Organization	Accredited Organizations	Inst_Accreditation

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Affiliates	Affiliate Of	Organization	Affiliate	Organization	Organization Affiliates	Affiliate
Agreement Signers	Agreement Signer Of	Organization	Agreement Signer	Organization	Organizations with Agreement Signers	Agreement_Signer
Approved Exchange Users	Approved By	Person	Order Approving Manager Of	Person	Exchange Approvers	Approving_Manager
Associates	Associate Of	Person	Associate Of	Person	Non-Directional	Associate
Bank Branches	Uses Clearinghouse	Organization	Clearinghouse For	Organization	Clearinghouses Branches	Clearinghouse_Bank
Banks	Branch Of	Organization	Has Branch	Organization	Banks Branches	Bank_And_Branch
Banks Branches	Has Branch	Organization	Branch Of	Organization	Banks	Bank_And_Branch
Banks Used by Legal Entities	Bank Used By	Organization	Uses Bank	Organization	Legal Entities That Use Banks	LE_And_Bank
Banks Used by Operating Units	Bank Used By	Organization	Uses Bank	Organization	Operating Units That Use Bank	OU_And_Bank
Beneficiaries	Beneficiary Of	Person	Benefactor Of	Person	People Benefactors	Beneficiary
Benefactors	Benefactor Of	Person	Beneficiary Of	Organization	Organization Beneficiaries	Beneficiary
Board Members	Board Member Of	Person	Contains Board Member	Organization	Boards	Board_Member
Boards	Contains Board Member	Organization	Board Member Of	Person	Board Members	Board_Member
Brokerages	Broker	Organization	Broker Of	Organization	Brokers	Broker
Brokers	Broker Of	Organization	Broker	Organization	Brokerages	Broker
Cared for Patients	Cared For By	Person	Caregiver for	Person	Caregivers	Caregiver
Caregivers	Caregiver for	Person	Cared For By	Person	Cared for Patients	Caregiver
Children	Child Of	Person	Parent Of	Person	Parents	Parent/Child
Clearinghouses Branches	Clearinghouse For	Organization	Uses Clearinghouse	Organization	Bank Branches	Clearinghouse_Bank
Competitors	Competitor Of	Organization	Competitor Of	Organization	Non-Directional	Competitor
Customers Managed by Distributor	Customer Managed By	Organization	Manages	Organization	Distributors	Partner_Managed_Customer

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Customers with Preferred Suppliers	Preferred Supplier To	Organization	Preferred Supplier By	Organization	Preferred Suppliers	Customer_Preferred_Supplier
D&B Divisions	Division Of	Organization	Headquarters Of	Organization	D&B Headquarters	DNB_Hierarchy
D&B Domestic Subsidiaries	Domestic Subsidiary Of	Organization	Domestic Ultimate Of	Organization	D&B Domestic Ultimates	DNB_Hierarchy
D&B Domestic Ultimates	Domestic Ultimate Of	Organization	Domestic Subsidiary Of	Organization	D&B Domestic Subsidiaries	DNB_Hierarchy
D&B Global Subsidiaries	Global Subsidiary Of	Organization	Global Ultimate Of	Organization	D&B Global Ultimates	DNB_Hierarchy
D&B Global Ultimates	Global Ultimate Of	Organization	Global Subsidiary Of	Organization	D&B Global Subsidiaries	DNB_Hierarchy
D&B Headquarters	Headquarters Of	Organization	Division Of	Organization	D&B Divisions	DNB_Hierarchy
D&B Parents	Parent Of	Organization	Subsidiary Of	Organization	D&B Subsidiaries	DNB_Hierarchy
D&B Subsidiaries	Subsidiary Of	Organization	Parent Of	Organization	D&B Parents	DNB_Hierarchy
Default Approvers for an Exchange Organization	Default Approver For	Person	Default Approver	Organization	Exchange Organizations with a Default Approver	POM_Default_Approver
Dependents	Guardian Of	Person	Dependent Of	Person	Guardians	Dependent
Distributors	Manages	Organization	Customer Managed By	Organization	Customers Managed by Distributor	Partner_Managed_Customer
Divisions	Division Of	Organization	Headquarters Of	Organization	Headquarters	Headquarters/Division
Domestic Partners	Domestic Partner Of	Person	Domestic Partner Of	Person	Non-Directional	Domestic_Partner
Domestic Subsidiaries	Domestic Subsidiary Of	Organization	Domestic Ultimate Of	Organization	Domestic Ultimates	Domestic_Ultimate
Domestic Ultimates	Domestic Ultimate Of	Organization	Domestic Subsidiary Of	Organization	Domestic Subsidiaries	Domestic_Ultimate
Download Privilege Granters	Download Content To	Organization	Download Content From	Organization	Organizations with Privilege to Download	Download_Content
Emergency Contacts	Emergency Contact For	Person	Emergency Contact Of	Person	Has Emergency Contacts	Emergency_Contact

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Employees	Employee Of	Person	Employer Of	Organization	Employers	Employment
Employers	Employer Of	Organization	Employee Of	Person	Employees	Employment
Exchange Approvers	Order Approving Manager Of	Person	Approved By	Person	Approved Exchange Users	Approving_Manager
Exchange Entity Referrers	Referred Party	Organization	Party Referred By	Organization	Referred Exchange Entities	POM_Party_Reference
Exchange Organizations with a Default Approver	Default Approver	Organization	Default Approver For	Person	Default Approvers for an Exchange Organization	POM_Default_Approver
Exchanges that manage content owned by another Organization	Third Party Author	Organization	Third Party Author For	Organization	Exchanges that own content managed by another Organization	Third_Party_Author
Exchanges that own content managed by another Organization	Third Party Author For	Organization	Third Party Author	Organization	Exchanges that manage content owned by another Organization	Third_Party_Author
Global Subsidiaries	Global Subsidiary Of	Organization	Global Ultimate Of	Organization	Global Ultimates	Global_Ultimate
Global Ultimates	Global Ultimate Of	Organization	Global Subsidiary Of	Organization	Global Subsidiaries	Global_Ultimate
Guarantors	Guarantor For	Person	Guarantor	Person	People with Guarantor	Guarantor
Guardians	Dependent Of	Person	Guardian Of	Person	Dependents	Dependent
Has Emergency Contacts	Emergency Contact Of	Person	Emergency Contact For	Person	Emergency Contacts	Emergency_Contact
Headquarters	Headquarters Of	Organization	Division Of	Organization	Divisions	Headquarters/Division
Healthcare Child Organizations	Child Of	Organization	Parent Of	Organization	Healthcare Parent Organizations	CTB_Enterprise_Hier
Healthcare Parent Organizations	Parent Of	Organization	Child Of	Organization	Healthcare Child Organizations	CTB_Enterprise_Hier
Institutional Guarantors	Guarantor For	Organization	Guarantor	Person	People with Organization Guarantors	Guarantor

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Institutions Attended	Has Student	Organization	Attends Institution	Person	Students Attending Institution	Studentinstitution
Instructors	Instructor Of	Person	Student Of	Person	Students	Student/Instructor
Inventory Organizations	Inventory Organization Of	Organization	Inventory Organization	Organization	Organizations with Inventory Organizations	Inventory_Org
Key Companies	Key Company Of	Organization	Key Company	Organization	Organizations with Key Companies	Key_Company
Kin	Next of Kin of	Person	Next of Kin for	Person	Next of Kin	Next_Of_Kin
Legal Entities That Use Banks	Uses Bank	Organization	Bank Used By	Organization	Banks Used by Legal Entities	LE_And_Bank
Management Reports	Reports To	Person	Manager Of	Person	Managers	Manager
Managers	Manager Of	Person	Reports To	Person	Management Reports	Manager
Modeled Companies	Modeled Company	Organization	Modeled By	Organization	Modeling Companies	Modeled_By
Modeling Companies	Modeled By	Organization	Modeled Company	Organization	Modeled Companies	Modeled_By
Next of Kin	Next of Kin for	Person	Next of Kin of	Person	Kin	Next_Of_Kin
Operating Units That Use Bank	Uses Bank	Organization	Bank Used By	Organization	Banks Used by Operating Units	OU_And_Bank
Organization Affiliates	Affiliate	Organization	Affiliate Of	Organization	Affiliates	Affiliate
Organization Beneficiaries	Beneficiary Of	Organization	Benefactor Of	Person	Benefactors	Beneficiary
Organization Contacts	Contact For	Person	Has Contact	Organization	Organizations with Contacts	Contact
Organization Customers	Customer Of	Organization	Seller To	Organization	Suppliers to People Suppliers for Organizations	Customer/Seller
Organization Guarantors of Organizations	Guarantor For	Organization	Guarantor	Organization	Organizations with Organizations Guarantors	Guarantor
Organizations for Grouping Procurement Users	Employee Of	Person	Employer Of	Organization	Users of Procurement Application	POS_Employment

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Organizations Providing References	Reference For	Organization	Reference For	Organization	Non-Directional	Reference
Organizations with Agreement Signers	Agreement Signer	Organization	Agreement Signer Of	Organization	Agreement Signers	Agreement Signer
Organizations with Contacts	Has Contact	Organization	Contact For	Person	Organization Contacts	Contact
Organizations with Inventory Organizations	Inventory Organization	Organization	Inventory Organization Of	Organization	Inventory Organizations	Inventory_Org
Organizations with Key Companies	Key Company	Organization	Key Company Of	Organization	Key Companies	Key_Company
Organizations with Organizations Guarantors	Guarantor	Organization	Guarantor For	Organization	Organization Guarantors of Organizations	Guarantor
Organizations with POM Default Administrators	Default Admin By	Organization	Default Admin For	Person	POM Default Administrators	Default_Admin
Organizations with Privilege to Download	Download Content From	Organization	Download Content To	Organization	Download Privilege Granters	Download_Content
Organizations with Registered Companies	Registered Company	Organization	Registered Company Of	Organization	Registered Companies	Registered_Company
Organizations with Repair Depot Providers	Repair Depot Provider	Organization	Repair Depot Provider For	Organization	Repair Depot Providers	Repair_Depot_Provider
Organizations with Stockholders	Stock Held By	Organization	Stock Holder Of	Organization	Stockholders	Stock_Holder
Organizations with Student Advisors	Has Advisor	Organization	Advisor At	Person	Student Advisors at Organization	Student_Advising_At
Organizations with Student Counselors	Has Counselor	Organization	Counselor At	Person	Student Counselors at Organizations	Student_Counseling_At

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Organizations with Unregistered Companies	Unregistered Company	Organization	Unregistered Company Of	Organization	Unregistered Companies	Unregistered_Company
Parents	Parent Of	Person	Child Of	Person	Children	Parent/Child
Parents of Subsidiaries	Parent Of	Organization	Subsidiary Of	Organization	Subsidiaries	Parent/Subsidiary
Parents of Subsidiary - Partner	Parent Of	Organization	Subsidiary Of	Organization	Subsidiaries Of - Partner	Partner_Hierarchy
Partners	Partner Of	Organization	Partner Of	Organization	Non-Directional	Partner
Payees	Pay To Of	Organization	Pay From Of	Organization	Payers	Payto
Payers	Pay From Of	Organization	Pay To Of	Organization	Payees	Payto
People Benefactors	Benefactor Of	Person	Beneficiary Of	Person	Beneficiaries	Beneficiary
People Contacts	Contact For	Person	Has Contact	Person	People with Contacts	Contact
People Customers	Customer Of	Person	Seller To	Organization	Suppliers to People Suppliers for Organizations	Customer/Seller
People with Contacts	Has Contact	Person	Contact For	Person	People Contacts	Contact
People with Guarantor	Guarantor	Person	Guarantor For	Person	Guarantors	Guarantor
People with Organization Guarantors	Guarantor	Person	Guarantor For	Organization	Institutional Guarantors	Guarantor
People with Referee	Has Referee	Person	Referee	Person	Referees	Applicant_Referee
POM Default Administrators	Default Admin For	Person	Default Admin By	Organization	Organizations with POM Default Administrators	Default_Admin
POM Legal Contacts	Legal Contact For	Person	Legal Contact	Organization	POM Organizations with Legal Contacts	Legal_Contact
POM Organizations with Legal Contacts	Legal Contact	Organization	Legal Contact For	Person	POM Legal Contacts	Legal_Contact

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
POM Registered Approvers	Registration Approver Of	Person	Registration Approved By	Person	Registered POM Approved People	Reg_Approver
Preferred Suppliers	Preferred Supplier By	Organization	Preferred Supplier To	Organization	Customers with Preferred Suppliers	Customer_PREFERRED_Supplier
Referees	Referee	Person	Has Referee	Person	People with Referee	Appliant_Referee
Referred Exchange Entities	Party Referred By	Organization	Referred Party	Organization	Exchange Entity Referrers	POM_Party_Reference
Registered Companies	Registered Company Of	Organization	Registered Company	Organization	Organizations with Registered Companies	Registered_Company
Registered POM Approved People	Registration Approved By	Person	Registration Approver Of	Person	POM Registered Approvers	Reg_Approver
Relatives	Relative Of	Person	Relative Of	Person	Non-Directional	Relative
Repair Depot Providers	Repair Depot Provider For	Organization	Repair Depot Provider	Organization	Organizations with Repair Depot Providers	Repair_Depot_Provider
Siblings	Sibling Of	Person	Sibling Of	Person	Non-Directional	Sibling
Shipping Destinations	Ship From Of	Organization	Ship To Of	Organization	Shipping Sources	Shipto
Shipping Sources	Ship To Of	Organization	Ship From Of	Organization	Shipping Destinations	Shipto
Spouses	Spouse Of	Person	Spouse Of	Person	Non-Directional	Spouse
Stockholders	Stock Holder Of	Organization	Stock Held By	Organization	Organizations with Stockholders	Stock_Holder
Student Advisees	Advisor Of	Person	Advisee Of	Person	Student Advisors	Student_Advising
Student Advisors	Advisee Of	Person	Advisor Of	Person	Student Advisees	Student_Advising
Student Advisors at Organization	Advisor At	Person	Has Advisor	Organization	Organizations with Student Advisors	Student_Advising_At
Student Counselees	Counselor Of	Person	Counselee Of	Person	Student Counselors	Student_Counseling
Student Counselors	Counselee Of	Person	Counselor Of	Person	Student Counselees	Student_Counseling

Subject Role	Subject Code	Subject Name	Object Code	Object Name	Object Role Reverse Role	Type
Student Counselors at Organization	Counselor At	Person	Has Counselor	Organization	Organizations with Student Counselors	Student_Counseling_At
Students	Student Of	Person	Instructor Of	Person	Instructors	Student/Instructor
Students Attending Institution	Attends Institution	Person	Has Student	Organization	Institutions Attended	Studentinstitution
Subsidiaries	Subsidiary Of	Organization	Parent Of	Organization	Parents of Subsidiaries	Parent/Subsidiary
Subsidiaries Of - Partner	Subsidiary Of	Organization	Parent Of	Organization	Parents of Subsidiary - Partner	Partner_Hierarchy
Suppliers for Organizations	Seller To	Organization	Customer Of	Organization	Organization Customers People Customers	Customer/Seller
Suppliers to People	Seller To	Organization	Customer Of	Person	Organization Customers People Customers	Customer/Seller
Unregistered Companies	Unregistered Company Of	Organization	Unregistered Company	Organization	Organizations with Unregistered Companies	Unregistered_Company
Users of Procurement Application	Employer Of	Organization	Employee Of	Person	Organizations for Grouping Procurement Users	POS_Employment
VAD Suppliers	VAD Vendor Of	Organization	VAD Of	Organization	VADs	VAD
VADs	VAD Of	Organization	VAD Vendor Of	Organization	VAD Suppliers	VAD
VAR Suppliers	VAR Vendor Of	Organization	VAR Of	Organization	VARs	VAR
VARs	VAR Of	Organization	VAR Vendor Of	Organization	VAR Suppliers	VAR

20.2.2 Globalization

You can manage the following items from the Globalization section:

- [Section 20.2.3, "Calendar Type"](#)
- [Section 20.2.4, "Accounting Calendar"](#)
- [Section 20.2.5, "Type Mapping"](#)
- [Section 20.2.6, "Create a New Type Mapping"](#)
- [Section 20.2.7, "Period Rate"](#)
- [Section 20.2.8, "GL Daily Rate"](#)
- [Section 20.2.9, "Transaction Calendar"](#)

20.2.3 Calendar Type

Navigation

Administration > General > Globalization > Calendar Type

Steps

1. To search for calendar types:
 - a. Select a Year Type from the drop-down list.
 - b. Enter a Period Type.
 - c. Click **Search**.
2. To create a new calendar type:
 - a. In the first blank Period Type field, enter the period type you want to create.
 - b. Enter the number of Periods Per Year (between 1 and 366 days).
 - c. Select a Year Type from the drop-down list.
 - d. Optionally, enter a Description.
3. Click **Update**.

20.2.4 Accounting Calendar

Navigation

Administration > General > Globalization > Accounting Calendar

20.2.4.1 Search for an Existing Accounting Calendar

Steps

To search for an existing Accounting Calendar:

1. Select a Calendar from the drop-down list.
2. Enter a Period Name.
3. Enter a Start Date.
4. Enter an End Date.
5. Click **Search**.

20.2.4.2 Create a New Accounting Calendar

A calendar for a new year should contain the period, quarter, and year, and there should be no missing days between periods.

Steps

To create a new accounting calendar:

1. Either click the **Create** button or in the first blank Prefix field, enter a prefix for the accounting calendar you want to create.
2. Select a Type from the drop-down list.
3. Enter a Year.
4. Enter a Quarter.
5. Enter a Number.
6. Select a From and To Date by clicking the Calendar icon.
7. Enter an calendar name.
8. Click **Create** from the create accounting calendar page OR if you created the calendar on the summary page, click **Update**.

Note: The number is validated against Periods Per Year for the period type defined in Calendar Type.

20.2.5 Type Mapping

Navigation

Administration > General > Globalization > Type Mapping

Steps

1. Set the profile option "OS: Forecast Calendar" with a calendar name.
2. Select the calendar defined in the previous profile option "OS: Forecast Calendar."

20.2.6 Create a New Type Mapping

Steps

To create a new type mapping:

1. In the first blank Period Type field, select a period type from which you want to set the conversion rates from the drop-down list. Make sure that the calendar you are using is the forecast calendar.
2. Select the Conversion Type from the drop-down list.
3. Enter a Description.
 - e. Check the Updatable and Deletable if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates Window (See Defining Conversion Rates for Periods below).

20.2.7 Period Rate

The currencies used for this application must be set up with the conversion rates for each period. The exchange rate should be entered for the smallest period type used by your company, i.e., day, week, month. Enter the exchange rate value for each of the currencies needed.

The Period Rate and GL Daily Rate page is used to enter and display the conversion rates for a specific period or for specific currencies.

Navigation

Administration > General > Globalization > Period Rate

Steps

The Pseudo Period Rates page opens.

1. To search for Pseudo Period Rates:
 - a. Select a Calendar from the drop-down list.
 - b. Enter the full or partial name of the Period Name, using percent sign (%) as a wildcard, click **Go**.
 - c. Select a Start or End Date under the Mapping Date.
 - d. Click **Search**.
2. To create a new period rate:
 - a. On the first blank Period Name line, enter a full or partial period name, using percent sign (%) as a wildcard. Click **Go**.
 - b. Select the currency you want to convert From from the drop-down list.
 - c. Select the currency you want to convert To from the drop-down list.
 - d. Conversion Type is automatically populated from Period Name list of values in a previous step.
 - e. Enter the rate in the Rate field.
 - f. The Updatable and Deletable boxes display if the pseudo period rates can be changed. If you need to change the status of these boxes, click the Type Mapping link.
3. Click **Update**.

20.2.8 GL Daily Rate

The currencies used for this application must be set up with the conversion rates for each period. The exchange rate should be entered for the smallest period type used by your company, i.e., day, week, month. Enter the exchange rate value for each of the currencies needed.

The Period Rate and GL Daily Rate page is used to enter and display the conversion rates for a specific period or for specific currencies.

Navigation

Administration > General > Globalization > GL Daily Rate

Steps

The GL Daily Rate page opens.

1. To search for a GL Daily Rate:
 - a. Select a From Currency from the drop-down list.
 - b. Select a To Currency from the drop-down list.
 - c. Select a Conversion Date by clicking the Calendar icon.
 - d. Select a Conversion Type from the drop-down list.
 - e. Click **Search**.
2. To create a new daily rate:
 - a. Select the first blank From Currency field and choose the currency you are converting from the drop-down list.
 - b. In the To Currency field, select the currency you want to convert to from the drop-down list.
 - c. Click the Calendar icon to select a Conversion Date.
 - d. Select a Conversion Type from the drop-down list.
 - e. Enter the Conversion Rate in the field provided. The Inverse Conversion Rate is calculated and provided automatically.

If the profile "Daily Rates Window: Enforce Inverse Relationship During Entry" is set to Yes, the application ensures that the conversion rate and the inverse conversion rate always have an inverse relationship. If either rate is changed, the application automatically recalculates the other as the inverse of the changed rate. If the profile option is set to No, then the

application will not enforce the inverse relationship. You can change either of the rates independently.

- f. Click the Enter by Date Range button which allows you to enter conversions for a date range.
3. Click **Update**.

20.2.9 Transaction Calendar

Use the following steps to set up the transaction calendar.

Navigation

Administration > General > Globalization > Transaction Calendar

20.2.9.1 Find an Existing Transaction Calendar

Use the name or description of the calendar in the appropriate field. Click **Go**.

20.2.9.2 Create a New Transaction Calendar

Steps

1. Enter the name for the new transaction calendar into the Name field.
2. Enter a description to identify the use of the calendar.
3. Select the days you want to include in the transaction calendar based on your business needs.
4. Click **Update**.

20.2.9.3 View Transaction Calendar Details

Steps

1. [Find an Existing Transaction Calendar](#) OR click the name of the transaction calendar.
2. Update details such as, changing a specific date to be included in or excluded from the transaction calendar. You can identify the date by finding the specific date and selecting or de-selecting the box associated with that date.
3. Click **Update**.

20.3 Sales Administration

Sales administration includes the topics related to sales functionality.

- [Section 20.3.1, "Menu Administration"](#)
- [Section 20.3.2, "Resequence Side Panel Navigation Menus"](#)
- [Section 20.3.3, "Change the Menu Name"](#)
- [Section 20.3.4, "Create a Parent Menu"](#)
- [Section 20.3.5, "Create Your Own Menu"](#)
- [Section 20.3.6, "Using Personalization"](#)
- [Section 20.3.7, "Publishing Saved Searches"](#)
- [Section 20.3.8, "Managing Published and Seeded Saved Searches and Reports"](#)
- [Section 20.3.9, "Home Page Personalization"](#)
- [Section 20.3.10, "Table Personalization"](#)
- [Section 20.3.11, "Home Page"](#)
- [Section 20.3.12, "Setting Up Home Page Bins Accessibility"](#)
- [Section 20.3.13, "External Tools"](#)
- [Section 20.3.14, "Home Page Message"](#)
- [Section 20.3.15, "Sales Category"](#)
- [Section 20.3.16, "Sales Class Type"](#)
- [Section 20.3.17, "Sales Class Code"](#)
- [Section 20.3.18, "Product Interests"](#)
- [Section 20.3.19, "Plan Element Mapping"](#)
- [Section 20.3.20, "Call Center"](#)
- [Section 20.3.21, "Opportunity"](#)
- [Section 20.3.22, "Win Probability"](#)
- [Section 20.3.23, "Sales Stage"](#)
- [Section 20.3.24, "Status Code"](#)
- [Section 20.3.25, "Sales Methodology"](#)

- [Section 20.3.26, "Forecast"](#)
- [Section 20.3.27, "Forecast Category"](#)
- [Section 20.3.28, "Forecast Category Mapping"](#)
- [Section 20.3.29, "Budget/Revenue Entry"](#)
- [Section 20.4, "Access Administration"](#)

20.3.1 Menu Administration

The Menu Administration page is used to organize the side panel navigation menus for Oracle Field Sales. By re-sequencing menus, creating parent/child menus, and re-naming menus, you can organize the side panel navigation to your preferences.

- [Section 20.3.2, "Resequence Side Panel Navigation Menus"](#)
- [Section 20.3.3, "Change the Menu Name"](#)
- [Section 20.3.4, "Create a Parent Menu"](#)
- [Section 20.3.5, "Create Your Own Menu"](#)

Navigation

Administration > Sales > Menu Administration

The Side Navigation page opens.

20.3.2 Resequence Side Panel Navigation Menus

You can use this feature to reorganize your side panel navigation menus.

Steps

1. Select a Menu Name from the drop-down list.
2. Click **Go**.
3. In the Sequence field enter the number that represents the sequence in which you want that menu to be displayed. For example, if you want Account menu to display first, you may enter the sequence number as 10. In this example, if you wanted to add a menu before or after the Account menu, you would enter a menu with the number 5 or 15 respectively.
4. Click **Update**.

20.3.3 Change the Menu Name

You can use this feature to change the names of menus.

Steps

1. Select a Menu Name from the drop-down list.
2. Click **Go**.

3. Enter the new menu name in the Attribute Text field.
For seeded menus, it is recommended that you do not change the Function Name.
4. Click **Update**.

20.3.4 Create a Parent Menu

You can use this feature to create parent menus. For example, if you want Classifications to become a parent menu of Relationships, indicate the parent and child menu relationship here.

Steps

1. Select a Menu Name for which you want to create a parent menu for from the drop-down list.
2. Click **Go**.
3. Select the parent menu from the Parent Attribute drop-down list. This parent attribute will become the parent menu of the menu you previously selected.
4. Click **Update**.

20.3.5 Create Your Own Menu

Steps

1. On the first blank line of the Menu Administration page, enter a Sequence number for the menu to appear in the side navigation panel. For example, if you have Menu A in sequence number 15 and Menu B in sequence number 20, you can fit Menu C in between A and B by entering 16 in the Sequence field.
2. Enter an attribute in the Attribute Field.
3. Enter the menu name that you want to display in the Attribute Text field.
For seeded menus, it is recommended that you do not change the Function Name.
4. If you want this menu to be a child menu, select the parent menu from the Parent Attribute drop-down list.
5. Click **Update**.

20.3.6 Using Personalization

The three parts of personalization are: saved searches, home page personalization, and table personalization. A user with System Administrator responsibility can publish these personalizations.

System Administrators can create and publish saved searches to users at the Application and Responsibility levels. At the Application level, the published search is available to all application users. At the Responsibility level, the search is available to users with those responsibilities.

An example:

Per your company's business rules, all sales representatives are required to monitor all opportunities created in the last 10 days. The personalization feature allows for a System Administrator to create this saved search and publish it to all sales representatives to use.

20.3.7 Publishing Saved Searches

Responsibility

System Administrator

Steps

1. Navigate to the tab for which you want to create a search.
2. Click **Personalize**.
3. Select the search parameters.
4. Enter the search name.
5. Click **Save**.

The Save button takes you to a page where you can decide whether to publish the search and at which responsibility level to publish the search.

6. Select the Level Type and the Level name of the users for which you want to publish the search. If you apply at the responsibility level, all users with the specific responsibility will be able to use the published search. If you apply at the Application level, all users of the application, regardless of their responsibility can use the search.
7. Click **Apply**.

20.3.8 Managing Published and Seeded Saved Searches and Reports

System Administrators can view all published searches for each module and disable, remove, or modify them.

If a System Administrator disables a search, it is not available to application users. Seeded searches cannot be deleted from the list of available searches and may be enabled by a System Administrator at any time.

The seeded saved searches are:

- My Leads (Owner): This search displays all leads for which you are the owner.
- My Leads (Sales Team): This search displays all leads for which you are on the sales team.
- My Open Oppties (Owner): This search displays all *open* opportunities for which you are the owner.
- My Open Oppties (Sales Credit): This search displays all *open* opportunities for which you are receiving sales credit.
- My Open Oppties (Sales Team): This search displays all *open* opportunities for which you are on the sales team.
- My Oppties (Owner): This search displays all opportunities for which you are the owner.
- My Oppties (Sales Credit): This search displays all opportunities for which you are receiving sales credit.
- My Oppties (Sales Team): This search displays all opportunities for which you are on the sales team.
- My Organizations (Sales Team): This search displays all organizations for which you are on the sales team.
- My Contacts (Access): This search displays all contacts for which you have access.
- My People (Sales Team): This search displays all people for which you are on the sales team.

System Administrators can create and publish reports to all users. They can also view these published reports and remove/modify them from the Saved Search Report Administration pages for the related module.

The seeded reports are:

- My Opportunity Summary
- Opportunity Summary Report

20.3.9 Home Page Personalization

The home page can be personalized by a user or a System Administrator. This section covers the topic for the System Administrator.

Default components are set up for bins, charts, and report and published for users who have not personalized their own home page. Home page personalization defaults can be set up for the Responsibility level, Application level, and for Self.

Responsibility

System Administrator

Steps

1. Navigate to Profiles > Home Page.
2. Select the bins, charts, and reports which you want to publish.
3. Click **Update**.

The Publish Personalization page opens.

4. Select the level at which you want the published items to be seen. The options are Self, Site, and Responsibility. If you select Responsibility, indicate the responsibility.
 - To remove published defaults, select the Remove check box of the item to be "un-published".
 - To restore the home page to original defaults, click the Apply Defaults button.

If users have not personalized the home page for themselves, the published defaults appear on the home page. If there are no published defaults for the Responsibility level, the defaults published for the Site level will be shown. If both Responsibility and Site level defaults were removed, a welcome message is shown when a user has not personalized the home page. A welcome message is also be shown when a user has personalized the home page with no components at all.

A defined set of Site level defaults are included with the application.

20.3.10 Table Personalization

Tables can be personalized by a user or a System Administrator. This section covers the topic for the System Administrator.

A System Administrator personalizes tables and publishes the defaults for users who have not personalized their own tables. Table personalization defaults can be set up for the Responsibility level and Application level.

Responsibility

System Administrator

Steps

1. Navigate to Profiles > Home Page.
2. Select the tables which you want to publish.
3. Click **Update**.

The Publish Personalization page opens.

4. Select the level at which you want the published items to be seen.

The options are Self, Site, and Responsibility. If you select Responsibility, indicate the responsibility.

To restore tables to original defaults, click the **Apply Defaults** button.

20.3.11 Home Page

Use these tools to manage home page information, including bins, charts, and reports. Also change or update your home page message here.

- [Section 20.3.12, "Setting Up Home Page Bins Accessibility"](#)
- [Section 20.3.13, "External Tools"](#)
- [Section 20.3.14, "Home Page Message"](#)

20.3.12 Setting Up Home Page Bins Accessibility

The home page displays selected bins of information within the application. You can manage which responsibility has access to which bins through the Home Page Bins link from the Administration tab.

Navigation

Administration > Sales > Home Page > Home Page Bins

Steps

1. The Home Page Bins Administration page opens.
2. Select the Application from the drop-down list.
3. Select the Responsibility for which you want to give bin access from the drop-down list.
4. Click **Search**.
5. Restrict access to the bin by checking the Disable box.
Permitting access to a bin means that you did not check the Disable box.
6. Click **Update**.

20.3.13 External Tools

Oracle Field Sales can provide links to external sites (HTML and jsp only) as well as Enterprise Resource Planning (ERP) applications. You may only link to self-service functions or functions which call HTML or jsp pages.

- [Section 20.3.13.1, "Setting Up Links to External Sites"](#)
- [Section 20.3.13.2, "Setting Up Links to ERP Applications"](#)

20.3.13.1 Setting Up Links to External Sites

Navigation

Administration > Sales > Home Page > External Tools

Steps

1. Enter the following required fields:
 - Category
 - Link text: This text will show on the page.
 - Link type (for example, a URL, `http://www.oracle.com`)
 - Description
2. Set the Link Type to URL from the drop-down list.
3. Check the Enabled box.
4. Click **Update**.

20.3.13.2 Setting Up Links to ERP Applications

Navigation

Administration > Sales > Home Page > External Tools

Steps

1. Enter the following required fields:
 - Category
 - Link text
 - Link URL (should be the function name of the ERP application page)

- Description of this function
2. Choose Function in the Link Type drop-down list.
 3. Check the Enabled box.
 4. Click **Update**.

You can access ERP applications if your responsibility level allows access to that application. In order to specify the responsibility for a user, in the FORMS application, choose "System Administrator" responsibility, then Security > Use > Define. Query on the user name and add in the responsibility and application name if they are not listed there.

Bounce the server after making any changes to the tools administration.

20.3.14 Home Page Message

Create or edit the message that is displayed on the home page. This message can be customized using HTML tags.

Navigation

Administration > Sales > Home Page > Home Page Message

Steps

1. Enter a new message in the text box. For example, "Welcome to Field Sales".
You can use HTML to customize the message. For example, to italicize a word, use `<i>your italicized word</i>`.
2. Click **Update**.

20.3.15 Sales Category

Use the following information to manage the sales category section:

- [Section 20.3.16, "Sales Class Type"](#)
- [Section 20.3.17, "Sales Class Code"](#)
- [Section 20.3.18, "Product Interests"](#)
- [Section 20.3.19, "Plan Element Mapping"](#)

20.3.16 Sales Class Type

Sales class types are used to classify accounts and opportunities.

Navigation

Administration > Sales > Sales Category > Sales Class Type

20.3.16.1 Find Sales Class Types

To find specific class types, select the class type from the drop-down list. Select a usage, if applicable. For example, to find all class types which are Account Classifications, select the Account Classifications check box. Click **Search**.

20.3.16.2 Create a Sales Class Type

Steps

1. Select the first blank Sales Class Type field and enter the name of the new sales class type.
2. Enter a description for the class type.
3. Select applicable check boxes to indicate where the classification is to be used, for example, Account Classification, Opportunity Classification, or Globally Enabled. The Globally Enabled check box will indicate that the classification is activated throughout the entire application.
4. Click **Update**.

20.3.17 Sales Class Code

Navigation

Administration > Sales > Sales Category > Sales Class Code

20.3.17.1 Find Sales Class Codes

To find specific class codes, select the class code from the drop-down list. Click **Search**.

20.3.17.2 Create New Sales Class Codes

Steps

1. Select the first blank Sales Class Code field and enter the name of the new sales class code.
2. Enter a description for the class code.
3. Select the Enabled check box to activate the code.
4. Click **Update**.

20.3.18 Product Interests

Navigation

Administration > Sales > Sales Category > Product Interests

Steps

All Sales products use the common product catalog in Oracle Product Lifecycle Management to keep track of the product hierarchy. Set up your product catalog in Oracle Product Lifecycle Management.

1. A hierarchical catalog called *Product* is seeded for use by Sales and Marketing. You can either use this seeded catalog or create a new product hierarchical catalog with flex structure *Product Categories*. See the instructions in the *Oracle Product Lifecycle Management Administrators Guide*.
2. Create new product categories with the flex structure *Product Categories*.
3. Add your created product categories to the product catalog, preserving the parent-child relationships.

4. Set the following Sales and Marketing related attributes for each product category:
 - Include in Forecast: All product categories that can be forecasted against should have this flag set.
 - Expected Purchase: All product categories that sales reps can log opportunity or lead lines against should have this flag set.
 - Exclude From User View: Some product categories may be in the catalog for purely reporting and collection purposes. Such product categories should have this flag set. The product hierarchy presented to sales reps will ignore these categories. These can however be used by analytical and reporting tools such as DBI.
5. Attach the product catalog you created to the *Product Reporting* functional area.
6. Using the Catalog Manager responsibility, run the concurrent request *Load Catalog Hierarchy* to make your categories visible to sales applications.

For information in setting up the product catalog, upgrading from a previous release, and mapping interest types, please refer to the *Oracle Field Sales Implementation Guide*.

20.3.18.1 Search for an Interest Type

Steps

1. Select an Interest Type from the drop-down list.
2. Enter a Description.
3. Check all applicable checkboxes to indicate where the classification is to be used (Person Interest or Expected Purchase).

Click **Search**.

20.3.19 Plan Element Mapping

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

One plan element can be mapped to one or more interest type/primary interest code/secondary interest code.

Plan element mapping is required for using Income Planner.

Navigation

Administration > Sales > Sales Category > Plan Element Mapping

- [Section 20.3.19.1, "Search for a Plan Element Mapping"](#)
- [Section 20.3.19.2, "Create a New Plan Element Mapping"](#)

20.3.19.1 Search for a Plan Element Mapping

Steps

1. Enter the plan element.
2. Select the mapping type from the drop-down list.
3. Click **Search**.

20.3.19.2 Create a New Plan Element Mapping

Steps

1. Select the first blank Plan Element field and select the plan element you want to map from the drop-down list.
2. From the second column, select the Mapping Type from the drop-down list.
 - * Map quota to primary interest code - if you want to map the plan element to a primary code.
 - * Map quota to secondary interest code - if you want to map the plan element to a secondary code.
 - * Map quota to interests type - if you want to map the plan element to an interest type.

3. Depending on the value you have chosen in step 3 above, continue by choosing an interest type.
4. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using percent sign (%) as a wildcard, and click Go.
5. Click **Update**.

20.3.20 Call Center

The Call Center is used for Oracle TeleSales. For more information on Oracle TeleSales, please refer to the *Oracle TeleSales Implementation Guide* and *Oracle TeleSales User Guide*.

20.3.21 Opportunity

In this section values are defined for the opportunity win probabilities, sales stages, status, and sales methodologies. The active values are displayed in the corresponding fields on the opportunity detail page.

See Also

- [Section 20.3.22, "Win Probability"](#)
- [Section 20.3.23, "Sales Stage"](#)
- [Section 20.3.24, "Status Code"](#)
- [Section 20.3.25, "Sales Methodology"](#)

20.3.22 Win Probability

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

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

- [Find and Modify a Win Probability](#)
- [Enter a New Probability](#)

20.3.22.1 Find and Modify a Win Probability

Use the following procedure to define or modify Win Probabilities.

Navigation

Administration > Sales > Opportunity > Win Probability

Steps

1. Enter the win probability number in the Win Probability field.
2. Optionally, enter the Meaning.
3. Click **Search**.

20.3.22.2 Enter a New Probability

Use the following procedure to define or modify Win Probabilities.

Navigation

Administration > Sales > Opportunity > Win Probability

Steps

1. Click in a **Win Probability** field in a new row.
2. Enter a Value between 0 and 100.
3. Enter or change the information in the **Meaning** field.
4. Select a Start Date in the **From** field by clicking the Calendar icon.
5. Optionally, enter an End Date in the **To** field. If an end date is entered, the Win Probability is disabled after that date.
6. Check the "Enabled" box to enable the Win Probability. If the Enabled box is not checked, the Win Probability will not appear in the page.
7. Click **Update**.

20.3.23 Sales Stage

A set of pre-defined Sales Stages is included with this application. You may choose not to use the pre-defined set and create customized sales stages of your own. Or, you can use a combination of the pre-defined set with additional customized Sales Stages.

- [Find an Existing Sales Stage](#)
- [Enter a New Sales Stage](#)

20.3.23.1 Find an Existing Sales Stage

Use the following procedure to define or modify Sales Stages.

Navigation

Administration > Sales > Opportunity > Sales Stage

Steps

1. Enter the sales stage name in the Name field.
2. Optionally, enter a Description.
3. Click **Search**.

20.3.23.2 Enter a New Sales Stage

Use the following procedure to define or modify Sales Stages.

Navigation

Administration > Sales > Opportunity > Sales Stage

Steps

1. Click in a Name field in a new row.
2. Enter a description
3. Enter a minimum and a maximum win probability value for this stage in the Min and Max fields.
4. Select a start date in the From field by clicking the Calendar icon and choosing a date.
5. Optionally, select an end date for the To field. If an end date is selected, the Sales Stage will be disabled after that date.

6. Check the Enabled box to enable the Sales Stage. If the Enabled box is not checked, the Sales Stage will not be enabled.
7. Click **Update**.

20.3.24 Status Code

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

20.3.24.1 Search for a Status Code

Use the following procedure to define Opportunity Status.

Navigation

Administration > Sales > Opportunity > Status Codes

Steps

1. Enter the Status Code.
2. Enter the Meaning
3. Enter the Description.
4. Click **Search**.

20.3.24.2 Create a New Status Code

Use the following procedure to define Opportunity Status.

Navigation

Administration > Sales > Opportunity > Status Codes

Steps

1. Click **Create**.
2. Enter a Status Code.
3. Enter a Meaning.
4. Enter a Description.
5. Check the "Enabled" box to activate the opportunity status.

6. Check the "Open" box to signify whether the opportunity is open or closed. If the box is selected, it means that the opportunity is open. Conversely, if the box is not selected, it means closed and requires a close reason to be entered.
7. Select the Include in Forecast box to include the status in forecasts.
8. The defined status can be used for Opportunity, Sales Lead, or both by selecting appropriate box in the Used For region.
9. The Win Loss Indicator region indicates whether the deal has been won, lost, or neither. If the open flag is unchecked, then the choices are won or lost.
10. Click **Create**.
11. Click **Update**.

20.3.25 Sales Methodology

Every time a sales representative has a potential opportunity, the sales representative follows a series of steps before closing the sale. This process is referred to as a Sales Methodology and the specific steps are referred to as Sales Stages. Each sales stage creates a set of tasks, mandatory or optional, to be performed by the sales representative in accordance with the Sales Methodology selected. However, a sales representative is not required to select a sales methodology if they choose not to and once a sales methodology is selected for an opportunity it cannot be changed.

The following list is the default Units of Measure (UOM) codes that, if used, the workflow calculates the planned end date. If not used, the planned end date and planned start date are the same as the system date:

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

If you use only these Unit of Measure codes, then you do not need to make any modifications. However, if you use any other Unit of Measure, then you must modify the CHECK_DURATION procedure in the workflow package AS_SALES_METH_WF to make sure that the start and end dates are correctly

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

Profiles that govern behavior when using Sales Methodologies are: *OS: Create Tasks Flag* which can be used to disable automatic creation of tasks throughout the sales methodology work flow, and *OS: Sales Methodology* that can be used to set the default sales methodology at the site, application, or user level.

Navigation

Administration > Sales > Opportunity > Sales Methodology

Steps

1. Click **Create**.
The Sales Methodology Create page opens.
2. Enter a name for the sales methodology.
3. Enter a description.
4. Select Effective From date by clicking the Calendar icon and choosing a date.
5. Select Effective To date by clicking the Calendar icon and choosing a date.
6. Enter the Sequence that with which you want the sales stage to follow.
7. Select a Sales Stage from the drop-down list.
8. Optionally, select a Task Template Group from the drop-down list.
9. Select a Minimum Win Probability from the drop-down list.
10. Select a Maximum Win Probability from the drop-down list.
11. Click **Create**.

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

20.3.26 Forecast

Forecast categories and forecast category mapping work together to build the list of product categories used in building forecasts, opportunity worksheets, and product category worksheets. Each forecast category can have a different list of product categories mapped to the selected category.

- [Section 20.3.27, "Forecast Category"](#)
- [Section 20.3.28, "Forecast Category Mapping"](#)
- [Section 20.3.29, "Budget/Revenue Entry"](#)

20.3.27 Forecast Category

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

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

- [Section 20.3.27.1, "Modify an Existing Forecast Category"](#)
- [Section 20.3.27.2, "Add a Forecast Category"](#)

20.3.27.1 Modify an Existing Forecast Category

Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

Steps

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

20.3.27.2 Add a Forecast Category

Navigation

Administration > Sales > Forecast > Forecast Category

The Forecast Category page opens.

Steps

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

20.3.28 Forecast Category Mapping

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

Use the following procedure to set up Forecast Categories.

20.3.28.1 Search for a Forecast Sales Category**Navigation**

Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

Steps

1. Select a Forecast Category Name from the drop-down list.
2. Click **Search**.

20.3.28.2 Create a New Sales Category Value**Navigation**

Administration > Sales > Forecast > Forecast Sales Category

The Forecast Sales Categories page opens.

Steps

1. In the first blank Product Category field, select a product category from the drop-down list.

You cannot include product categories which have parent/child relationships as part of the same forecast category.

2. Select a Start Date by clicking the Calendar icon.
3. Select an End Date by clicking the Calendar icon.
4. Click **Update**.

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

20.3.29 Budget/Revenue Entry

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

Please note, salesperson number refers to resource number.

20.3.29.1 Search for an Existing Budget and Revenue Entry

Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. Select the Sales Group from the drop-down list.
2. Select a Period Type from the drop-down list.
3. Select a Period Name from the drop-down list.
4. Click **Apply**.
5. The subordinate sales group and salesperson search results are displayed.

20.3.29.2 Enter New Budget and Revenue Amounts

Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. Select the Sales Group from the drop-down list.
2. Select a Period Type from the drop-down list.
3. Select a Period Name from the drop-down list.

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

20.3.29.3 Upload Data From a File

Navigation

Administration > Sales > Forecast > Budget/Revenue Entry

Steps

1. Click the "**Click here to Upload a file to a database**" link.
2. Enter the file name with a directory path and file extension OR click **Browse** to retrieve the file name from a local drive.

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

Example file format: "period name", "forecast category name", "credit type name", "sales group number", "sales person number", "budget amount", "revenue amount", "currency code"

3. Click **Upload**.

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

20.4 Access Administration

This function is for System Administrators only. This functionality generates a report with the sales team members within each search area. For example, you can search for sales team members within a certain territory by going to the Territory Access section and selecting a territory.

Topics included are:

- [Section 20.4.1, "Territory"](#)
- [Section 20.4.2, "Resource"](#)
- [Section 20.4.3, "Customer"](#)
- [Section 20.4.4, "Lead"](#)
- [Section 20.4.5, "Opportunity"](#)

20.4.1 Territory

Search for team members by territory.

Navigation

Administration > Sales > Accesses > Territory

Steps

1. Enter the territory for which you are searching.
2. Choose to display the Customer, Opportunities, or Leads by checking the box.
3. Click **Go**.

20.4.2 Resource

Search for team members by resource group.

Navigation

Administration > Sales > Accesses > Resource

Steps

1. Enter the resource for which you are searching.
2. Choose to display the Customer, Opportunities, or Leads by checking the box.
3. Click **Go**.

20.4.3 Customer

Select a customer or address and click the Search button to see the resources assigned to the customer.

Navigation

Administration > Sales > Accesses > Customer

Steps

1. Enter the full or partial customer/address, using percent sign (%) as a wildcard.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the customer are displayed.

20.4.4 Lead

Select a lead and click the Search button to see the resources assigned to the lead.

Navigation

Administration > Sales > Accesses > Lead

Steps

1. Enter the full or partial lead name, using percent sign (%) as a wildcard.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the lead are displayed.

20.4.5 Opportunity

Select an opportunity and click the Search button to see the resources assigned to the opportunity

Navigation

Administration > Sales > Accesses > Opportunity

Steps

1. Enter the full or partial opportunity name, using percent sign (%) as a wildcard.
2. Click **Go**.
3. Select from the search results. Click **Select**.
4. The resources assigned to the opportunity are displayed.

20.5 Leads Administration

The Administration tab allows a system administrator to set up items that govern the way leads are handled in this application.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for information.

20.6 Resource Administration

The Administration tab allows a system administrator to set up items that govern the way resources such as, employees, groups, and roles are handled.

Refer to the *Oracle Common Application Components Implementation Guide* for information.

20.7 Adding a Custom Report to Report Listings

Some reports are shipped as part of this product. They are listed under each tab under the Reports subtab in the Report Listing Pages. If you create a custom report and want it to display on the Reports subtab, follow these steps to add the report:

Steps

1. Create a JSP for users to enter their search criteria. This page is called the ParameterPage. The page needs to have a filter section if saved query is needed for this particular report.
2. Create another JSP to show the report data. This page is called the ResultPage.
3. Create one FND function for each of those two pages. Add the ParameterPage's function under ASF_XXXXX_REPORTS menu. XXXXX may be "CUSTOMER", or "LEAD", and so on.
4. You can use function exclusions on responsibilities to control which responsibility cannot see which reports. For more details about how to exclude FND functions from some responsibilities, please refer to the CRM Foundation documentation.
5. If no saved query is used for this report, you can stop here. Otherwise, please continue to the next step.
6. Create a default saved query for that report. When you visit the ParameterPage for the first time, you will see seeded parameters based on this default saved query. This can be done by modifying a Java program and run it against customer's database.
7. Each report needs to have a unique query type. For example, you may choose to give your report a query type QTQT.
8. Register in AK the attribute of the name of this report type and put it in the region "ASF_REPORT_NAMES"

9. In JTA property manager, you will need to do the following things:
 - To create a new value (QTQT) for your report query type in the value set of the property "querytype.<xxx>reports." <xxx> can be customer, lead, forecast or opportunity.
 - To create a new value for your report query type in the value set of the property "querytype.reports" (same value as the previous one, QTQT.)
 - To create a new JTA property called "querytype.QTQT.desc." And add the following values for this property.

```
sectionname$<sn>  
parameterpage$<pp>  
resultpage$<rp>  
tab$<t>  
name$<name>
```

<sn> is the section name of the filter section in ParameterPage.

<pp> is the FND function name of ParameterPage, defined in Step 3.

<rp> is the FND function name of ResultPage, defined in Step 3.

<t> is the tab function name to be highlighted for this query type, like ASF_OPPORTUNITES.

<name> is the AK attribute name for the name of this report type.

10. Change oracle.apps.asf.util.ReportNameHash to reflect the changes in AK as well. This step will be obsolete after OSO Profile page has taken the new report registration method with JTA's Property Manager.

20.8 Excluding Tabs and Functions

Function security is the mechanism by which user access to applications functionality is controlled.

The Oracle Applications GUI-based architecture aggregates several related business functions into a single form. Because all users should not have access to every business function in a form, Oracle Applications provides the ability to identify pieces of applications logic as functions. When part of an application's functionality is identified as a function, it can be secured (i.e., included or excluded from a responsibility). This security is thoroughly described in the Oracle Applications System Administrator's Guide, Release 11i.

The goal of this topic is to give you a brief overview so that you understand the concept behind this action. Refer to the *Oracle Applications System Administrators's Guide*, Release 11i for more detailed information.

Terms

Function: A function is a part of an application's functionality that is registered under a unique name for the purpose of assigning it to, or excluding it from, a responsibility.

Menu: A menu is a hierarchical arrangement of functions and menus of functions. Each responsibility has a menu assigned to it.

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

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

20.8.0.1 To exclude tabs in this application

Steps

1. Create a new menu.
2. Identify menus corresponding to the tabs or subtabs that you wish to exclude.

3. Save your work.

20.8.0.2 To prevent users from accessing specific functions in this application

Steps

1. Navigate to the responsibility that you want to update.
2. Identify the functions that you want to exclude by entering the name of the function.
3. Save your work.

20.8.0.3 To find function names

Steps

These instructions are for JSP pages developed with the Oracle Field Sales framework only. Applications using this framework include ASF, ASM, AMF, IBC, AST, CN, and BIL.

As a System Administrator, find a function name with the following steps:

1. Login to the application and navigate to the desired page.
2. Find the URL. The URL should be "http://...../<a file name, with_.jsp>?...".
3. Go to \$HTML_TOP.
4. Open that file, and search for a line sayingsetFunctionName("<a function name>").

That is the function name for the page.

Warning: If this function is to be excluded, you must bounce the server in order for the changes to be reflected in the user interface. Also, if this page is accessible from links or buttons, those links or buttons will not function after the function is excluded. It is recommended that you test all pages from which this excluded page may be reached before excluding the function.

Reference

Refer to the *Oracle Applications System Administrator's Guide* for complete information about function security.

20.9 Updating Job Title Type and Department Type LOV

The following section includes instruction on how to update Job Title Type LOV and Department Type LOV that are located on the create contact page.

Responsibility

System Administrator

Navigation

Oracle Sales Setup > Lookup Codes > Receivables

Steps

- Query Type = RESPONSIBILITY and add or disable the responsibility types needed.
- Query Type = DEPARTMENT_TYPE and add or disable the responsibility types needed.

Save your changes.

20.10 Administering Personalization and Saved Searches

The three parts of personalization are: saved searches, home page personalization, and table personalization. A user with System Administrator responsibility can publish these personalizations.

System Administrators can create and publish saved searches to users at the Application and Responsibility levels. At the Application level, the published search is available to all application users. At the Responsibility level, the search is available to users with those responsibilities.

An example:

Per your company's business rules, all sales representatives are required to monitor all opportunities created in the last 10 days. The personalization feature allows for a System Administrator to create this saved search and publish it to all sales representatives to use.

20.10.1 Publishing Saved Searches

Responsibility

System Administrator

Steps

1. Navigate to the tab for which you want to create a search.
2. Click **Personalize**.
3. Select the search parameters.
4. Enter the search name.
5. Click **Save**.

The Save button takes you to a page where you can decide whether to publish the search and at which responsibility level to publish the search.

6. Select the Level Type and the Level name of the users for which you want to publish the search. If you apply at the responsibility level, all users with the specific responsibility will be able to use the published search. If you apply at the Application level, all users of the application, regardless of their responsibility can use the search.
7. Click **Apply**.

20.10.2 Managing Published and Seeded Saved Searches and Reports

System Administrators can view all published searches for each module and disable, remove, or modify them.

If a System Administrator disables a search, it is not available to application users. Seeded searches cannot be deleted from the list of available searches and may be enabled by a System Administrator at any time.

The seeded saved searches are:

- My Leads (Owner): This search displays all leads for which you are the owner.
- My Leads (Sales Team): This search displays all leads for which you are on the sales team.
- My Open Oppties (Owner): This search displays all *open* opportunities for which you are the owner.
- My Open Oppties (Sales Credit): This search displays all *open* opportunities for which you are receiving sales credit.
- My Open Oppties (Sales Team): This search displays all *open* opportunities for which you are on the sales team.
- My Oppties (Owner): This search displays all opportunities for which you are the owner.
- My Oppties (Sales Credit): This search displays all opportunities for which you are receiving sales credit.
- My Oppties (Sales Team): This search displays all opportunities for which you are on the sales team.
- My Organizations (Sales Team): This search displays all organizations for which you are on the sales team.
- My Contacts (Access): This search displays all contacts for which you have access.
- My People (Sales Team): This search displays all people for which you are on the sales team.

System Administrators can create and publish reports to all users. They can also view these published reports and remove/modify them from the Saved Search Report Administration pages for the related module.

The seeded reports are:

- My Opportunity Summary
- Opportunity Summary Report

20.10.3 Home Page Personalization

The home page can be personalized by a user or a System Administrator. This section covers the topic for the System Administrator.

Default components are set up for bins, charts, and report and published for users who have not personalized their own home page. Home page personalization defaults can be set up for the Responsibility level, Application level, and for Self.

Responsibility

System Administrator

Steps

1. Navigate to Profiles > Home Page.
2. Select the bins, charts, and reports which you want to publish.
3. Click **Update**.

The Publish Personalization page opens.

4. Select the level at which you want the published items to be seen. The options are Self, Site, and Responsibility. If you select Responsibility, indicate the responsibility.
 - To remove published defaults, select the Remove check box of the item to be "un-published".
 - To restore the home page to original defaults, click the Apply Defaults button.

If users have not personalized the home page for themselves, the published defaults appear on the home page. If there are no published defaults for the Responsibility level, the defaults published for the Site level will be shown. If both Responsibility and Site level defaults were removed, a welcome message is shown when a user has not personalized the home page. A welcome message is also shown when a user has personalized the home page with no components at all.

A defined set of Site level defaults are included with the application.

20.10.4 Table Personalization

Tables can be personalized by a user or a System Administrator. This section covers the topic for the System Administrator.

A System Administrator personalizes tables and publishes the defaults for users who have not personalized their own tables. Table personalization defaults can be set up for the Responsibility level and Application level.

Responsibility

System Administrator

Steps

1. Navigate to Profiles > Home Page.
2. Select the tables which you want to publish.
3. Click **Update**.

The Publish Personalization page opens.

4. Select the level at which you want the published items to be seen. The options are Self, Site, and Responsibility. If you select Responsibility, indicate the responsibility.
 - To restore tables to original defaults, click the Apply Defaults button.

Glossary

call sheet

Call sheets are lists, generated from contact lists, of people with which you want to have an interaction.

CRM

CRM is an acronym for Customer Relationship Management.

customer

Defined as an organization, person, or contact.

DUNS number

Dunn and Bradstreet number

E-Business Suite

Oracle Field Sales is part of the Oracle E-Business Suite, an integrated suite of applications for the enterprise, including both ERP and CRM.

ERP

ERP is an acronym for Enterprise Resource Planning.

Flexfields

Flexfields allow you to customize data fields to meet your specific organizational needs.

forecast

A predicted amount of sales for a specific time period.

forecast threshold

Before creating opportunity worksheets you can set up a forecast threshold to simplify your data input. A forecast threshold is a currency amount defined in your profile preferences that establishes a value, and any forecast equal to or below that value will be rolled up into a lump sum. This saves sales representatives and managers valuable time entering forecast data for opportunities below a certain value, the forecast threshold. This applies to opportunity worksheets only and this feature is optional.

Thresholds are not converted if you change your currency. If you change your currency for forecasting, you need to set the threshold amount accordingly.

Income Planner

Calculates compensation and performs "what if" scenarios to view actual compensation. Intended to motivate and incent the sales force by viewing possible compensation.

organization

A customer that is an organization.

person

A customer that is a person.

profiles

Profiles are used in this application to govern the way the application works.

sales executive

Manages sales managers and sales representatives.

sales manager

Manages one or more sales representatives.

Sales Methodology

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

sales representative

Does not manage any other sales representatives. However, a sales manager can also have a role as a sales manager with a different login.

SIC

Standard Industry Code

Trading Community Architecture (TCA)

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

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