



PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Sales Applications PeopleBook

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PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Sales Applications PeopleBook
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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: <i>Blank:</i> Batch is unposted and pending approval. <i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. <i>D:</i> The batch posted successfully. <i>E:</i> The batch is in error. You must correct the batch before it can post. <i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E. <i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document. If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and Fiscal Year

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications Preface

This preface discusses:

- PeopleSoft products
- PeopleSoft application fundamentals

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft EnterpriseOne CRM Foundation
- PeopleSoft EnterpriseOne Foundation-Address Book
- PeopleSoft EnterpriseOne Mobile Sales
- PeopleSoft EnterpriseOne Mobile Synchronization
- PeopleSoft EnterpriseOne Sales Force Automation
- PeopleSoft EnterpriseOne Sales Order Management
- PeopleSoft EnterpriseOne Supply Chain Management

PeopleSoft Application Fundamentals

Additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*.

See Also

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, “PeopleSoft EnterpriseOne CRM Application Fundamentals Preface”

CHAPTER 1

Getting Started With PeopleSoft EnterpriseOne CRM Sales Applications

This chapter discusses:

- CRM Sales applications overview.
- CRM Sales applications business processes.
- CRM Sales application integrations.
- CRM Sales application implementation.

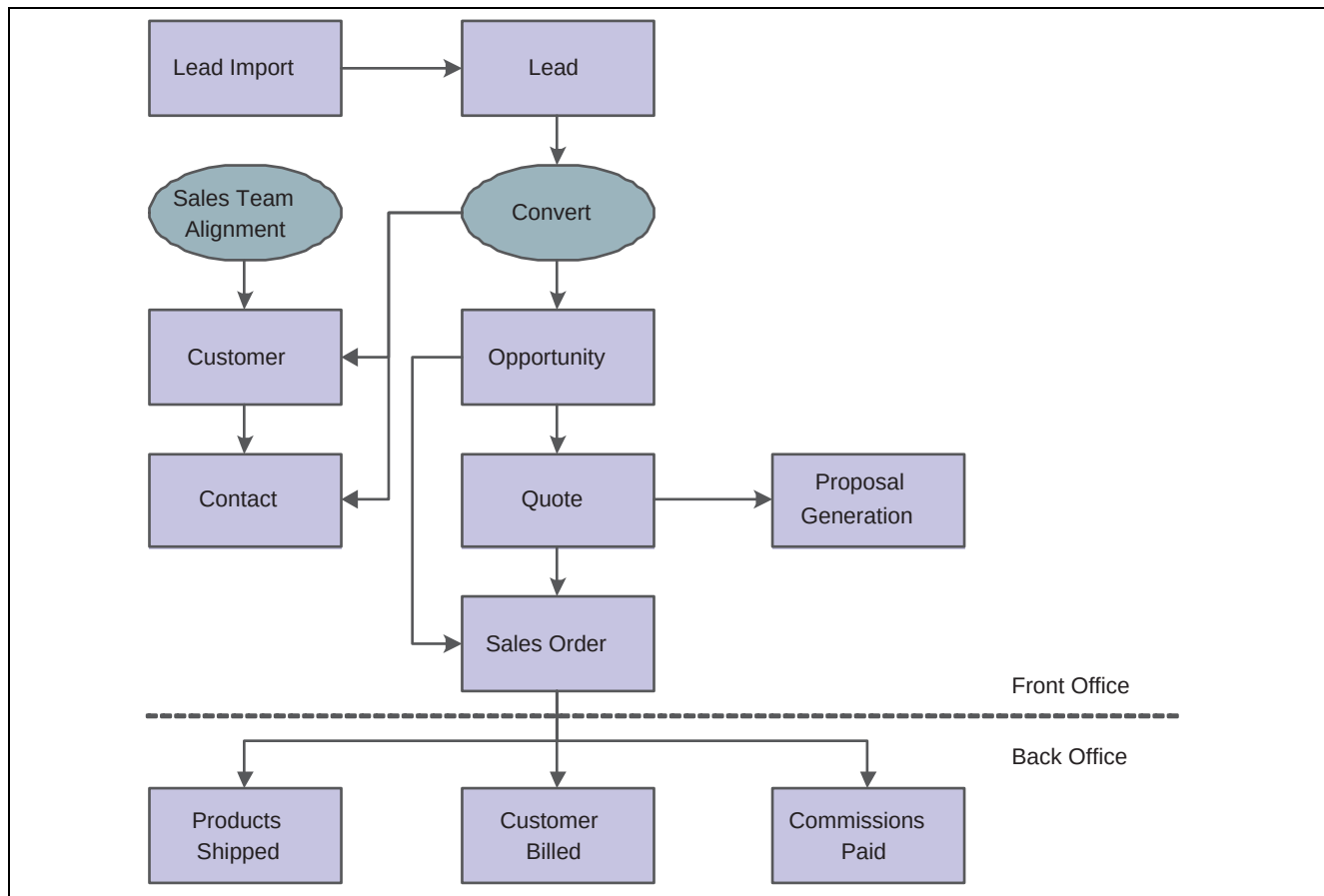
CRM Sales Applications Overview

You use the CRM Sales applications to successfully manage the organization's sales strategies, sales force, and sales opportunities. CRM Sales applications can be used to automate, standardize, maintain, and analyze sales information. For example, you can:

- Create qualification scripts that the sales force can use to determine whether a sales lead or opportunity is worth pursuing.
- Create sales methodologies, which the sales force can use to standardize and organize the activities associated with the sale of specific goods or services.
- Track and maintain sales leads.
- Track and maintain sales opportunities, customers and contacts.
- Create sales quotes and sales orders directly from a sales opportunity.
- Review and analyze the sales pipeline for many entities, such as employees, territories, or customers.
- Create and analyze sales forecasts, which can provide the organization with the information it needs to determine whether sales strategies are successful.
- Track and maintain information about competitors.
- Provide sales information to the manufacturing department to assist in demand planning.
- Use many applications while disconnected from the network.

CRM Sales Applications Business Process

This process flow illustrates the Lead to Cash business processes, which is supported by CRM Sales applications:



Lead to Cash Process Flow

We discuss these business processes in the business process chapters in this PeopleBook.

CRM Sales Application Integrations

CRM Sales applications works with other PeopleSoft EnterpriseOne applications to ensure that all information is fully integrated. CRM Sales applications integrate with these PeopleSoft EnterpriseOne products:

- Accounts Receivable
- Address Book
- CRM Foundation
- Sales Order Management
- Supply Chain Management

We discuss integration considerations in the implementation chapters of this PeopleBook. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

Accounts Receivable

CRM Sales applications integrate with Accounts Receivable to enable users to perform credit checks on sales opportunities. This enables sales representatives to determine, before the sale is finalized, whether the prospective customer has sufficient credit to purchase the goods and services in which they are interested.

Address Book

CRM Sales applications integrate with Address Book in many areas, including:

- Employees
- Partners
- Contacts
- Customers
- Calendars
- Activities
- Action Plans

CRM Foundation

CRM Foundation applications provide the basis for the CRM Sales Force Automation system. CRM Constants are used to determine how the system processes sales information. You enter employees, customers, contacts, and partners using CRM Foundation applications. You also use product catalogues and items during the sales cycle. You can also use email groups and email merge functionality to keep in close contact with customers, partners, and sales team members. These applications are all part of the CRM Foundation product.

Sales Order Management

CRM Sales applications integrate closely with Sales Order Management. From the CRM Sales Force Automation system, you can generate sales quotes and sales orders. Once the sales quotes and orders have been generated, you use the Sales Order Management system to update and process the orders. You can also work with sales orders while in disconnected mode using the Mobile Sales and Mobile Synchronization products.

Supply Chain Management

The CRM Sales Force Automation system integrates with Supply Chain Management, enabling manufacturing organizations to utilize the information that is created by sales forecasts when determining the future demand for products. Using the SCBM Outbound Processor program, the Supply Chain Management systems can identify the active sales opportunities, and use that information to forecast product demand.

CRM Sales Application Implementation

This section provides an overview of the steps that are required to implement PeopleSoft EnterpriseOne CRM Sales applications.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of resources appears in the preface in *About These PeopleBooks* with information about where to find the most current version of each.

Global Implementation Steps

This table lists the suggested global implementation steps for PeopleSoft EnterpriseOne CRM products:

Step	Reference
1. Set up global UDC tables.	<i>EnterpriseOne Tools 8.94 PeopleBook: Foundation</i>
2. Set up companies, fiscal date patterns, and business units.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook, "Setting Up an Organization"</i>
3. Set up next numbers.	<i>EnterpriseOne Tools 8.94 PeopleBook: Foundation</i>
4. (Optional) Set up accounts, and the chart of accounts.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook, "Setting Up Accounts"</i>
5. (Optional) Set up the General Accounting constants.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook, "Setting Up the General Accounting System"</i>
6. (Optional) Set up multicurrency processing, including currency codes and exchange rates.	• <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook, "Setting Up General Accounting for Multicurrency Processing"</i> • <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook, "Setting Up Exchange Rates"</i>
7. (Optional) Set up ledger type rules.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook, "Setting Up Ledger Type Rules for General Accounting"</i>
8. Set up branch/plant constants.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook, "Setting Up the Inventory Management System"</i>

Implementation Steps for CRM Sales Applications

This table lists the implementation steps for CRM Sales applications:

Step	Reference
1. Set up CRM Constants.	<i>PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, "Setting Up CRM Constants and Employees"</i>
2. Set up CRM Sales application UDCs	Chapter 3, "Setting Up Sales Fundamentals," page 13
3. Set up territories and industry groupings.	Chapter 3, "Setting Up Sales Fundamentals," page 13
4. Set up sales methodologies.	Chapter 3, "Setting Up Sales Fundamentals," page 13
5. Set up qualification scripts.	Chapter 3, "Setting Up Sales Fundamentals," page 13
6. Set up applications to run in disconnected mode.	Chapter 8, "Using the Mobile Sales Applications," page 107

CHAPTER 2

Understanding CRM Sales Applications

This chapter provides overviews of:

- Sales Force Automation setup.
- The sales cycle.
- Sales measurement tools.
- Key people in sales.

Understanding Sales Force Automation Setup

Before sales representatives can complete the steps in the sales cycle, an organization must define sales strategies, methodologies, and processes. When you develop well-defined and organized sales strategies, you enable the sales teams to be more effective and efficient when selling the organization's products and services. These foundational setup pieces include:

- Sales methodologies.
- Qualification parameters.
- Industry groupings and territories.
- Sales team alignment.

Sales Methodologies

You use sales methodologies to define the typical steps that a sales representative might complete to close a particular type of sale. Sales methodologies define the milestones associated with a type of sale, and they assist sales representatives in completing all of the predefined tasks and activities that have proved to help close a specified type of sale.

Sales methodologies are also used to calculate the amount of potential revenue that is associated with each active opportunity for pipeline purposes. When you create a methodology, you create sales cycle steps for that methodology. You then assign a probability percentage to each sales cycle step. When a sales representative creates a sales opportunity, they associate it with a sales cycle step. When the sales representative enters a monetary amount on the opportunity, the system calculates, using the probability from the sales cycle setup, the amount of potential revenue associated with the opportunity.

Using sales methodologies with predefined milestones, activities, and action plans helps the sales team to focus on the right task at the right time. It also helps them manage each potential sale effectively and efficiently.

You can also set up sales drivers for each sales methodology. Sales drivers represent the issues that are important to a customer, with regard to a particular sales. You can also assign importance to each sales driver.

Qualification Parameters

To be as efficient as possible, you want the sales organization to spend the majority of its time on potential customers who are both willing and able to purchase goods and services. Using qualification scripts, you can define the parameters, or guidelines, that the organization uses to determine whether a lead or opportunity should be pursued.

Sales representatives use the script, which includes product-specific questions, to score the lead or opportunity. If the score meets or exceeds the goal, the lead or opportunity is considered qualified. By determining early in the sales cycle that a lead or opportunity is not willing or able to do business with the organization, you can save valuable time and money.

Industries and Territories

If the organization has a large sales force, it is probable that the sales teams are organized by geographic locations and by product or industry expertise. Using the Territory Application program (P90CA140) and the Industry Grouping Application program (P90CA12A), you can define each industry grouping that the organization uses, as well as the geographic territories that the sales team supports.

You can then add sales team members to each territory and industry grouping, and activate the sales team members using effective dating.

Sales Force Alignment

After you have set up sales territories and industries, and assigned sales team members to those territories and industries, you can allow the system to automatically align the sales force. The system identifies the territory and industry groupings that are associated with each customer, and assigns to the customer all of the sales team members who are currently active in *both* the industry grouping *and* the territory. The system updates the customer sales team each time a customer record is added or changed.

Alternatively, you can run the Sales Team Alignment TC program (R90CA18A, version XJDE0007) to update customer sales teams. You might choose to run this program if the sales territories or industry groupings are reorganized, or if sales team members leave the organization.

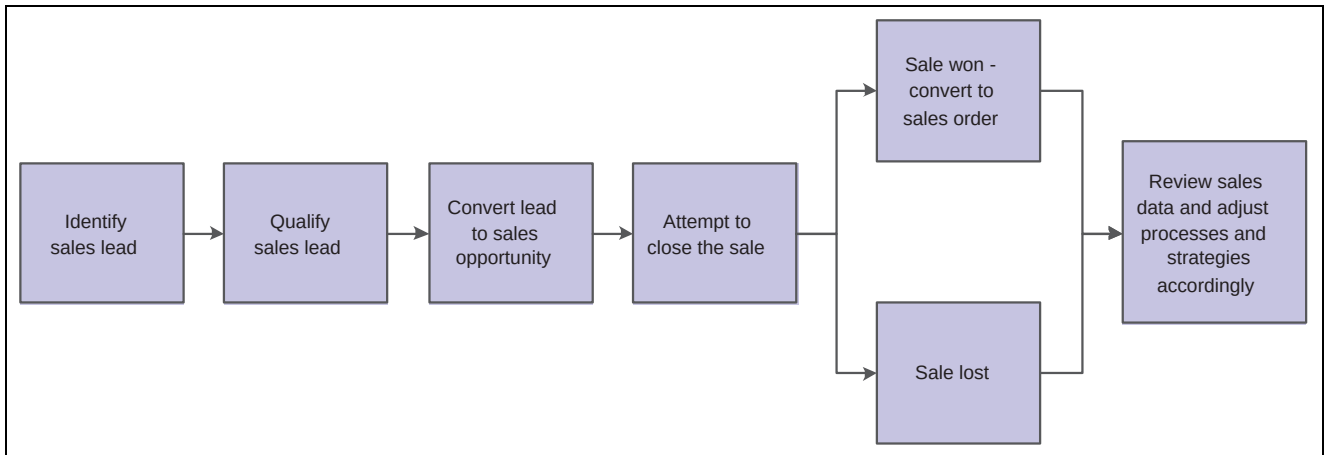
Lastly, you can exclude customer records from the automated alignment process. If you exclude a customer from the automated alignment process, you must assign sales team members to the customer manually.

Understanding the Sales Cycle

After you have set up the sales organization, sales teams can begin to sell products and services using the sales processes and strategies that you have defined. The sales cycle encompasses all of the steps that a sales team member completes in order to sell products or services. The sales cycle, also known as the lead-to-delivery process, includes:

- Sourcing and tracking sales leads.
- Qualifying leads.
- Converting leads to sales opportunities.
- Converting sales opportunities into revenue.

This graphic illustrates the sales cycle:



The sales cycle

Sales Leads

A sales lead is the first point of contact an organization has with a customer or prospective customer. An organization might receive sales leads from several sources such as purchased lists, sales and marketing events, partner contacts, personal referrals, or through continuing business with an existing customer.

Using the CRM - Manage Leads program (P90CB010), you can enter and track sales leads. You can also import a list of leads using the Import Leads program (P90CB015).

You can associate activities and action plans with leads. Activities are the typical tasks that a sales representative should complete for the specified type of sales lead. Action plans are lists of predefined activities that you want to associate with a lead. When you associate an action plan with a lead, the system creates the activities associated with the action plan for the selected lead. You can then view these activities using the calendaring functions from the PeopleSoft EnterpriseOne Address Book system. Action plans and activities can help sales representatives organize their workloads, ensuring that the appropriate tasks are completed at the appropriate time.

Lead Conversion

After you enter a lead into the system, you can qualify the lead to determine whether it should be pursued. Using the CRM - Manage Qualification Scripts program (P90CB040), you set up qualification scripts that provide sales representatives with a quantifiable method to determine whether the lead is worth pursuing.

Qualification scripts contain predefined questions and answers. These questions, and their associated answers, are assigned values. When the sales representative enters the answers into the system, the lead's qualification score is automatically calculated. The sales representative can then compare the lead's score to the predefined qualification goal. If the score meets or exceeds the score, the lead is considered qualified and should be pursued. The qualification goal is simply a guideline for the representative to use when determining whether to pursue the lead.

Once you have determined that the lead is qualified, you can convert the lead into an opportunity. With the click of a button, you can automatically generate a sales opportunity record directly from the sales lead. When you convert a lead, the system creates a customer record, a contact record, and an opportunity record. You then use the Manage Opportunities program (P90CB020) to track and process additional information about the potential sale.

Each sales opportunity that you create must be associated with a sales methodology. The sales cycle that is associated with the methodology is used to determine the probability that the opportunity will be converted to a sale, the expected close date of the opportunity, and the predefined action plans or activities that should be completed for the opportunity. You can also enter additional information for each sales opportunity, such as:

- Qualification information

If necessary, you can qualify the opportunity record. Though opportunities are typically created during lead conversion from a qualified lead record, there are times when you will enter an opportunity without having had a lead record. In these instances, you can use qualification scripts to qualify the opportunity to determine whether it should be pursued further.

- Contact information

You can include each contact that is associated with the customer, along with their contact information. You can also include influencer information, which sales representatives can use to identify the key players in a sales deal, along with their feelings about the transaction.

- Product information

You can attach specific products or product catalogs to a sales opportunity. You can enter the quantities that the customer is interested in purchasing, along with the beginning price that you are offering to the customer. If you enter specific items, quantities, and prices, the system uses this information to calculate the potential revenue associated with the opportunity.

- Sales team information

When you create a sales opportunity, the system automatically assigns the active sales team members from the associated customer to the opportunity. You can manually add or remove sales team members from the opportunity, assign roles, and specify whether the sales team member is eligible for commission.

- Cost information

You can enter all of the time spent and costs incurred by sales team members while working on the sales opportunity. You can enter a budgeted amount for each opportunity, and track whether the costs associated with the opportunity have exceeded this amount.

- Sales driver information

You can enter the factors that have the greatest impact on the customer's decision to purchase goods or services from an organization. These factors are called sales drivers. You can also rank these sales drivers in order of importance.

- Activity information

When you create an opportunity, either manually or through the lead conversion process, you must assign a sales methodology to the record. The sales methodology might have action plans associated with it. However, you might find it necessary to enter additional activities or link additional action plans that contain activities that are specific to the opportunity. You can review these activities using the calendaring function from the PeopleSoft EnterpriseOne Address Book system.

- Influencer information

You can enter influencers, which are used to identify the important people that are involved in a sales opportunity. When you add an influencer to the opportunity, you can also enter information about their feelings regarding the sale. For example, you can enter an influencer, and also enter that the person is enthusiastic about the sale.

- Competitor information

You can attach a competitor to a sales opportunity. By attaching competitors to an opportunity, sales representatives can easily determine who they are working against when trying to close a sale.

Sales Order Creation

As sales representatives progress through the sales cycle, they continue to enter and track information using the opportunity record. As the cycle progresses, customers might request a quote for the goods in which they are interested. Using the Convert to Quote button, you can automatically generate a sales quote from the opportunity record.

After you create the quote, you can access it from the opportunity record; however, the sales quote is stored in the Sales Order Management system. You can create as many quotes as necessary for an opportunity.

Lastly, if the customer decides to purchase goods or services, click the Convert to Sales Order button to convert the opportunity to a sales order. Like a sales quote, the sales order is also stored and managed from the Sales Order Management system. However, you can access the sales order directly from the opportunity record. If necessary, you can create multiple sales orders for an opportunity.

Once you have generated the sales order, you can update pricing, shipping, item, and customer information using the Sales Order Management system. When you have completed all updates to the sales order, you can submit the order for processing.

Understanding Sales Measurement Tools

This section provides an overview of the tools that can help the organization measure the productivity of the sales force.

The last step in the sales cycle is to review and analyze sales data to determine where the organization's strengths lie, and what its weaknesses are. When you analyze sales data, you might determine that the sales processes and strategies must be changed in order for the organization to be successful. Sales measurement tools include:

- Sales pipelines
- Sales forecasts
- Sales reports

Sales Pipelines

Sales pipelines provide you with an at-a-glance view of the amount of revenue that is currently in process, and might be realized in the near future. The sales pipeline includes the revenue amounts that are associated with active sales opportunities, and is divided into categories by the probability that the opportunity will close successfully. For example, if an opportunity has a close probability of 25 percent, the revenue associated with that opportunity is included in the 20–29 percent category of the sales pipeline.

You can review the sales pipeline for individual employees, customers, contacts, industry groupings, territories, forecasts, and competitors. Reviewing the pipeline for each of these entities can provide you with:

- Pipeline information for employees.

Reviewing the pipelines for individual employees gives you an easy and fast method of comparing the members of the sales organization to determine which sales teams and sales team members are the most productive.

- Pipeline information for customers.

Reviewing customer pipelines can help you to determine which customers are providing the organization with the most potential revenue. This information can help you determine whether specific customers need additional sales team members to support them, which customers might be valuable business references, or whether specific customers should receive additional or special attention from the organization.

- Pipeline information for competitors.

Reviewing the sales pipeline for competitors can help you determine which competitors are effecting the sales organization the most. When reviewing competitor pipelines, you might find that a certain competitor stands out, and is involved in more sales deals than any other organization. You can then take the necessary steps, such as pricing or product changes, to compete effectively with the specified competitor.

- Pipeline information for industry groupings and territories.

Reviewing the pipelines for industry groupings and territories can help you determine which products, in which areas, are providing the organization with the most potential revenue. If you find that the pipeline for a particular industry or territory is significantly larger than others, you can focus resources on those areas.

Sales Forecasts

You can also use sales forecasts to help measure the sales organization's productivity. Using the Manage Forecasts program (P90CB060), you select a group of sales opportunities and create a sales forecast based on those opportunities. The system calculates the amount of revenue that is associated with the selected group of opportunities. If necessary, you can override this amount. Because you control which opportunities are included in the forecast, and you can override revenue amounts, the sales forecast typically provides you with a more accurate view of potential revenue than the sales pipeline.

You can update a sales forecast as many times as necessary. When you feel that the forecast accurately depicts future sales, you can freeze the forecast. When you freeze a forecast, the system creates a point-in-time record of the opportunities that are associated with the forecast. You can use this information to compare actual revenue to forecasted revenue, and analyze the causes of large discrepancies between these two amounts.

For example, if a large opportunity is lost after a forecast is frozen, the actual and forecasted revenue amounts will likely be very different. You can compare the opportunities that were included in the forecast, as they were when the forecast was frozen, against the actual opportunities that closed during the specified period. By reviewing the forecasted opportunities against those that actually closed, you can identify which opportunities were not closed as planned. You can then analyze this information and take action as necessary. You can also compare a frozen forecast against sales orders for the period or commission totals.

You can also specify whether you feel that a sales forecast is accurate enough to be considered by the manufacturing organization in their demand forecasting process by selecting the Approve for Demand Management option on the forecast. The manufacturing department can use the SCBM Outbound Processor program (R34A700) to extract sales opportunity information for demand forecasting. Depending on the SCBM Outbound Processor settings, they can extract information for inclusion in the demand forecasting process in one of these formats:

- Opportunities that are associated with a sales forecast for a specified date.
- Opportunities that are associated with a frozen forecast for a specified date.

Reports

The CRM Sales Force Automation system provides you with numerous reports to help you analyze the organization's sales information. These sales-related reports, listed by category, are available:

- Lead Reports:
 - Lead Tracking Report.
 - Lead by Product Category Report.

- Lead by Lead Source Report.
- Five reports are available to print lead addresses in different formats.
- Opportunity Reports:
 - Opportunities by Channels Report.
 - Opportunities by Probability Report.
 - Opportunities by Probability for a Sales Rep Report.
 - Opportunities by Territories Report.
 - Opportunities by Channels for a Sales Rep Report.
 - Opportunity Summary Report.
- Forecast Reports:
 - Forecast - Frozen Forecast Status Report.
 - Opportunity Pipeline Review by Close Date Report.
- Action Plans and Activities Reports:
 - Action Plan List Report.
 - Activities for a Customer Contact Report.
 - Periodic Planner Report.
- Customer Reports:
 - Customer Contact Summary Report.
 - Customer Summary - Selected Report.
 - Contacts for a Customer Report.
- Additional Reports:
 - Competitor Item Sheet Detail Report.
 - Employee Phone List Report.
 - Partner Listing Report.
 - Product Catalog List Report.
 - Three reports are available to print contact addresses in different formats.

Understanding the Key People in Sales

To effectively sell goods and services, you must have a thorough understanding of who the key players are in each deal. The CRM Sales Force Automation system enables you to track and manage all of the people that can effect the success of a sale, including:

- Employees
- Partners
- Customers
- Influencers

- Competitors

Employees

Before you can assign an employee to a sales team, the employee must exist in the PeopleSoft EnterpriseOne Address Book system. Using the Manage Employees program (P90CA040), you can enter employees into the system, and include all CRM-related information at the time of entry. The Manage Employees program provides users with a single entry point that they can use to enter and maintain CRM-related employee information.

Partners

You can also include partners on sales teams. However, before you can assign a partner to a sales team, the partner must exist in the PeopleSoft EnterpriseOne Address Book system. Using the Address Book program (P01012), you can enter partners into the system. When you enter a partner, the search type must be PA.

Customers

In order to sell effectively, you must understand customers, their businesses, and their business needs. You use the CRM Customer program (P90CA080) to enter customers into the PeopleSoft EnterpriseOne Address Book system. When you enter a customer into the system, you can enter multiple contacts, addresses, phone numbers, email addresses, and attachments for each customer. The CRM Customer program provides users with a single entry point to review and update all CRM-related customer information.

Influencers

Influencers are the most important customers, contacts, or employees involved in a sales opportunity. Influencers are the people who play an active role in determining whether the deal is closed, and the sale is completed. You can track influencers, their roles within their organizations, and their perceptions and feelings about the deal. You enter influencer information for each opportunity.

Competitors

Understanding the competition, what they can deliver to customers, and for what price, can be a significant advantage when trying to win business. Using the Manage Competitor program (P6917901), you can track this information. You can attach products, product catalogs, or attachments to competitor records, which can be used to determine how the competitor compares to your organization.

CHAPTER 3

Setting Up Sales Fundamentals

This chapter provides an overview of the CRM Sales Force Automation system, lists prerequisites, and discusses how to:

- Set up user defined codes for CRM Sales applications.
- Set up territories and industry groupings.
- Set up sales methodologies.
- Set up qualification scripts.

Understanding the CRM Sales Force Automation System

Before you can process sales information, set up sales teams, and enter leads and opportunities, you must set up the sales system. The CRM_Constants program (P90CA000) is used to drive sales processing. These constants determine the way in which the system processes sales information and the sales features that the organization uses.

You must also review, and at times, add information to sales-specific user defined code (UDC) tables. The majority of the UDC tables that are associated with the sales system can be found under system code 90CB.

If the sales force is defined by geographic areas, or industry specialties, you must also set up territories and industry groupings. This information is used when you set up and align the sales force.

You can create sales methodologies to assist the sales team members in organizing and carrying out sales activities, tasks, and strategies. Sales methodologies enable you to attach predefined activities to a sales team member at each step of the sales cycle for a particular product or service. Sales cycle steps from the associated sales methodologies are also used to calculate the weighted revenue potential for each active opportunity.

Lastly, you can set up qualification scripts. You use qualification scripts to determine whether the leads and opportunities that the sales organization generates are worth pursuing. Using qualification scripts, you can define questions, answers, and goals for each type of sale. When you complete a script, the system calculates the lead or opportunity's qualification score. The sales team member can use this score to determine whether the lead or opportunity is worth pursuing.

Prerequisites

Before you complete the tasks in this section:

Set up the CRM Constants.

You should also have a complete understanding of the CRM Foundation system, and should review the CRM Application Fundamentals documentation to determine whether additional setup is necessary to process sales information correctly.

See *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, “Setting Up CRM Constants and Employees,” Setting Up CRM Constants.

Setting Up User Defined Codes for CRM Sales Applications

This section provides an overview of the user-defined codes (UDCs) for CRM Sales applications, and discusses how to set up UDCs for CRM Sales Applications.

Understanding UDCs for CRM Sales Applications

UDCs are used throughout the PeopleSoft EnterpriseOne system to store values that the organization uses to process business information. Before you begin processing information, you should review the UDCs that are associated with the systems the organization uses, and verify that the appropriate values are available.

For the CRM Sales Force Automation system (system code 90CB), these UDCs are available:

UDC Table	Description
90CB/CA - Sales Driver Category	You set up sales driver categories to define the reasons that a potential customer might purchase products or services from the organization. Typically, sales drivers are the important reasons that sales representatives need to focus on in order to successfully sell to the customer. For example, a common concern that customers have is whether the organization has enough inventory to satisfy their needs on an ongoing basis. Therefore, you can set up a sales driver category code to represent Inventory.
90CB/CC - CRM Sold To Ship To	You use CRM Sold To Ship To codes to determine which customer to use when determining which members of the sales force to assign to a sales opportunity. A sales opportunity might have one customer set as the Sold To customer, and a different customer set as the Ship To customer. The system assigns sales team members from either the Sold To customer's sales team, the Ship To customer's sales team, or both, depending on this value. You should not change these codes.
90CB/CE - Category Expense	You use category expense codes to specify the types of expenses that are incurred during the sales process. Examples of category expense codes might include air travel, hotel, and per diem.
90CB/CG - Category Time	You use category time codes to specify how a sales representative spends time during the sales process. Examples of category time codes might include demonstrations, development, or setup time.
90CB/CT - Cost Type	You use cost type codes to specify whether a cost or expense is an amount of time or a monetary amount.

UDC Table	Description
90CB/FC - Function Code	You set up function codes to specify the roles that contacts have in their respective organizations. For example, you might set up function codes to represent roles such as CEO, CIO, Staff, Supervisor, or Owner.
90CB/FS - Forecast Status	You set up forecast status codes to specify whether a sales forecast has been submitted or is currently open for revision. Once a forecast has been submitted, it cannot be revised.
90CB/IM - Sales Driver Importance	You set up sales driver importance codes to identify how important a particular sales driver is to a potential customer. For example, you might set up codes 1 through 5, where 1 is the most important, and 5 is the least important. When you enter a sales driver category code on a lead or opportunity, you can then assign an importance code, which will assist the sales representative in knowing how important that driver is to the deal.
90CB/LR - Lost Reason	You use lost reason codes to specify the reason that a lead or opportunity was not closed. You can then use this information to analyze the reasons why the sales force is losing business. For example, you might find that a high percentage of sales are lost because the price is too high. This information might cause you to research the market to verify whether the prices that the organization has set are in line with prices of competitors.
90CB/LS - Lead Source	You use lead source codes to specify how a lead was identified to an organization. For example, you might set up a code for a particular trade show. You can then analyze the number of leads that were sourced from that trade show to determine whether to attend the show in upcoming years.
90CB/PM - Payment Method	You use payment methods to specify how a person is paid for the expense
90CB/QT - Qualification Question Type	You use qualification question type codes to specify the type of question you are asking. The code is informational only, and is used to assist the sales representative in understanding the context of the question.
90CB/SL - Sponsorship Level	You use sponsorship level codes to describe how an influencer endorses the associated sales deal. For example, you use sponsorship level codes to specify that an influencer is an advocate, an opponent, enthusiastic, or pessimistic about the deal.

UDC Table	Description
90CB/ST - Sponsorship Type	You use sponsorship type codes to specify the role that an influencer plays in the sales deal. Examples of sponsorship type codes include executive, financial, or technical.
90CB/ST - Status	You use status codes to specify the status of a lead. Examples of status codes include Active and Converted.

You might also want to review the UDCs that are associated with other CRM system codes. These additional system codes are included in the CRM product family:

- 90B - CRM Financial Services.
- 90CA - CRM Foundation.
- 90CD - CRM Service Management.
- 90CE - CRM Solution Advisor.
- 90CF - CRM Call Scripting.
- 90CG - CRM Case Management.
- 90S - CRM Standalone Base Applications.

You should also review the UDCs for other PeopleSoft EnterpriseOne systems that the organization uses. Examples of systems that are commonly used in conjunction with the CRM Sales Force Automation system include:

- 01 - Address Book.
- 34A - Advanced Planning & Scheduling.
- 41 - Inventory Management.
- 42 - Sales Management.
- 42B - Sales Order Entry.
- 42S - Customer Self Service.

Note. If you need to create custom UDCs for CRM, you should use system code 90M, CRM Custom.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Foundation

Forms Used to Set Up UDCs for CRM Sales Applications

Form Name	Form ID	Navigation	Usage
Work With User Defined Codes	W0004AA	System Administration Tools (GH9011), User Defined Codes	Review and set up UDCs for CRM Sales applications.

Setting Up UDCs for CRM Sales Applications

Access the Work With User Defined Codes form.

To set up UDCs for CRM Sales applications:

1. Locate the UDC you want to review by completing the Product Code and User Defined Code fields.
2. To search for a list of UDC tables in a specific product code, leave the User Defined Code field blank, and click Search.

You can search on all of the CRM product codes to verify that all of the necessary values have been set up. Examples of CRM product codes include 90CB, 90CA, and 90CE.

3. Review the existing values.

If necessary, add additional values to the table to support organizational requirements.

Setting Up Territories and Industry Groupings

This section provides an overview of sales territories and industry groups, and discusses how to:

- Create sales territories.
- Add address information to a sales territory.
- Set processing options for the Territory Application program (P90CA140).
- Set up industry groupings.
- Set processing options for the Industry Grouping Application program (P90CA12A).

Understanding Sales Territories and Industry Groupings

Before you can align the sales force, you must enter the information that the system needs in order to automatically assign sales team members to accounts. First you must set up sales territories.

You enter territories to separate the sales force into geographic regions. When you set up territories, you assign country, state, city, and postal code information to each territory. Though you can assign the same country, state, and city to more than one territory, you cannot assign the same postal code to multiple territories.

To add additional countries to the system, you add new codes in UDC 00/CN. To enter additional states into the system, you add new codes to UDC 00/S. To add new cities or postal codes to the system, you use the Postal Code Transaction program (P01117). You must enter this information into the system before you can assign it to a territory.

You can set up parent and child territories. For example, you might have a large sales force that covers Europe. This sales force might be split into smaller sub-territories. Therefore, you might set up the parent territory as *Europe*, and create child territories such as:

- Germany
- France
- Spain
- Italy

When you enter customer records, the system uses the address information that you enter for each territory, along with the address you enter for the customer, to determine which territory the customer belongs to.

After you set up territories, you set up industry codes and industry groupings. First, you must verify that all industry codes in which your customers do business are in UDC 01/SC. Then, you create industry groupings. After you create industry groupings, you associate industry codes from UDC 01/SC to each grouping. You cannot add an industry code to more than one industry grouping.

This information is used to determine what industry grouping a customer is associated with, which is then used to determine which sales team members are assigned to the account. Additionally, you can set up parent and child industry groupings. An organization's sales force might be very specialized by product or service area. Therefore, the organization might choose to create specialized industry groupings.

For example, an organization specializing in selling widgets and gadgets to the automotive and medical industries might create these parent industry groupings:

- Automotive
- Medical

The organization can then create child industry groupings. Examples of child industry groupings that might be created under the Automotive parent industry grouping include:

- Automotive Widgets
- Automotive Gadgets

After you set up territories, industry codes, and industry groupings, you can then associated sales team members with each territory and industry grouping. The system uses this information to automatically assign sales team members to accounts based on their industry groupings, geographic proximity to the address that is associated with the account, and effective dates.

Additionally, you can click the Expand All and Collapse All options on the Search for Territories and the Search for Industry Groupings forms to review the hierarchical structure of territories and industry groupings.

See Also

Chapter 4, "Managing the Sales Force," page 35

PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook, "Setting Up the Address Book System," Setting Up Postal Codes

Forms Used to Set Up Sales Territories and Industry Groupings

Form Name	Form ID	Navigation	Usage
Search for Territories	W90CA140K	Sales Force Automation Setup (G90CA03), Territory	Review existing territories or access the Add Territory form.
Add Territory	W90CA140H	Click Add on the Search for Territories form.	Set up territories.
Territory - Manage <Territory Name>	W90CA140A	Select the territory on the Search for Territories form, and then click Select.	Access forms to add address information to a territory.
Search for Industry Grouping	W90CA12AB	Sales Force Automation Setup (G90CA03), Industry Grouping	Review existing industry groupings or access the Add Industry Grouping form.
Add Industry Grouping	W90CA12AF	Click Add on the Search for Industry Grouping form.	Set up industry groupings.

Creating Sales Territories

Access the Add Territory form.

Parent Territory

Enter the name of the parent territory under which this new territory belongs. You must create the parent territory before you can enter it.

Adding Address Information to a Sales Territory

Access the Territory - Manage <Territory Name> Form.

Territory - Territory - Manage New England

Territory

Sales

[Detail](#) | [Country](#) | **[State](#)** | [City](#) | [Postal Code](#) | [Customer](#)

Close

Records 1 - 6

☐		State	Description
☐		CT	Connecticut
☐		MA	Massachusetts
☐		ME	Maine
☐		NH	New Hampshire
☐		RI	Rhode Island
☐		VT	Vermont

Assign State

Remove

Expand Hierarchy

Territory - Manage <Territory Name> form: Territory tab: State link

To add address information to a territory:

1. Click the Country link, and then click the Assign Country button.
2. Search for and select the countries that you want to attach to the territory, and then click Select.
3. Click the State link and then click the Assign State button.
4. Search for and select the states that you want to attach to the territory, and then click Select.
5. Click the City link and then click the Assign City button.
6. Search for and select the cities that you want to attach to the territory, and then click Select.
7. Click the Postal Code link and then click the Assign Postal Code button.
8. Search for and select the postal codes that you want to attach to the territory, and then click Select.

Setting Processing Options for the Territory Application Program (P90CA140)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default values that the Territory Application program uses.

- | | |
|---|--|
| 1. Sales Team Employee Search Type | <p>Enter the Address Book search type that was used to create sales teams or sales groups. The default value is <i>E</i>.</p> <p>You can only assign address book records with search types E, PA, and SG the value that you specify in this processing option to a sales territory.</p> <p>If you want to assign sales teams to sales territories, you must set them up using the search type value that you enter in this processing option.</p> |
|---|--|

Version

These processing options specify the default versions that the Territory Application program uses.

- | | |
|-----------------------|---|
| 1. Opportunity | Enter the version of the Manage Opportunities program (P90CB020) that is used when viewing the opportunities associated with a sales territory. |
|-----------------------|---|

Setting Up Industry Groupings

Access the Add Industry Grouping form.

- On the Add Industry Grouping form, complete the Name field, and if this industry grouping is a child grouping, complete the Parent Industry Group field.
You must create the parent industry grouping before you can enter it here.
- Click Save and Continue.
- On the Industry Grouping–Manage <Industry Grouping Name> form, click the Industry link, and then click Assign Industry.
- On the Assign Industry form, select each industry code that you want to assign to the industry grouping, and then click Select.
- On the Industry Grouping–Manage <Industry Grouping Name> form, click Close to exit the program.

Setting Processing Options for the Industry Grouping Application Program (P90CA12A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default values that the Industry Grouping Application program uses.

1. Sales Team Employee Search Type

Enter the Address Book search type that was used to create sales teams or sales groups.

You can only assign address book records with search types E, PA, and SG to an industry grouping.

If you want to assign sales teams to industry groupings, you must set them up using the search type value that you enter in this processing option.

Version

These processing options specify the default versions that the Territory Application program uses.

1. Opportunity

Enter the version of the Manage Opportunities program (P90CB020) that is used when viewing the opportunities associated with an industry grouping.

Setting Up Sales Methodologies

This section provides an overview of sales methodologies, lists prerequisites, and discusses how to set up sales methodologies.

Understanding Sales Methodologies

You use sales methodologies to define the typical steps that a sales representative might complete to close a particular type of sale. Sales methodologies define the milestones associated with a type of sale, and they assist sales representatives in completing all of the predefined tasks and activities that have proven to help with the specified type of sale.

Sales methodologies include sales cycle steps, which are also used to calculate the amount of potential revenue that is associated with each active opportunity.

You enter sales methodologies using the Sales Methodology - Entry Point program (P90CB050). Sales methodology information is stored in these tables:

- F90CB050
- F90CB05A
- F90CB05B

Sales Methodology Setup

When you set up a sales methodology, you define sales cycle steps for the methodology. A typical sales methodology might include these sales cycle steps:

- Initial Call
- Proposal
- Demonstration
- Quote
- Won Business
- Lost Business

For each step, you assign a sequence and a probability of closing the sale. The sequence is used to specify the order in which the steps should be completed. The probability of closing is used to calculate the amount of business the organization might expect to receive at that step in the sales cycle.

Typically, the first steps in a sales cycle have a lower probability of closing than the later steps. For example, the organization might find that it is able to win business during the initial call step 2 times out of every 100 calls. Therefore, you might assign a 2 percent probability to the Initial Call sales cycle step. Similarly, you might find that sales representatives are able to close eight out of 10 deals once the transaction reaches the Quote sales cycle step. Therefore, you might assign a probability of 80 percent to the Quote sales cycle step.

The percentages that you assign to these sales cycle steps are used to calculate pipeline amounts. The pipeline is used to determine how much potential business is currently in process. You can exclude sales cycle steps from the pipeline calculation if you choose. The system multiplies the potential revenue amount that is associated with the opportunity by the probability that is associated with the active sales cycle step. This amount is then entered into the pipeline in the bracket associated with the probability percentage.

For example, if an opportunity has a potential revenue amount of 100,000 USD, and the active sales cycle step on the opportunity is Quote, which has a probability of 30 percent, the system performs these actions:

- The system calculates the pipeline amount as $100,000 \text{ USD} * 30 \text{ percent} = 30,000 \text{ USD}$.
- The system enters 30,000 USD into the pipeline in the 30-39 percent bracket.

You can also associate an action plan with each sales cycle step in a methodology. An action plan is a list of predefined tasks and activities that a sales representative should complete when they are in a particular step of the sales cycle. For example, the Proposal step might be associated with an action plan that includes these activities:

- Input the data that you received during the initial call and generate a proposal document.
- Send the proposal document, along with a thank you note, to the opportunity contact.
- One week from the date you mail the proposal, place a follow-up call to the opportunity contact.

In addition to sales cycle steps and action plans, you can also associate sales drivers with a sales methodology. Sales drivers are the forces that play the greatest part in a potential customer's decisions to select your business. When you add a sales driver to a methodology, you can define the importance of that sales driver.

For example, you might find that the most important sales driver in a particular sales methodology is a client's budget. Therefore, you can set up a sales driver code, and assign it a high level of importance. You set up sales driver codes in UDC 90CB/CA. You set up sales driver importance codes in UDC 90CB/IM. You must set up these codes before you can assign sales drivers and importance codes to a sales methodology.

Default Sales Methodology

When you set up sales methodologies, you must define one as the default methodology. This default methodology might be a generic methodology that can be used for any type of sale. You can have only one active default sales methodology at any given time. The default methodology must have at least one active sales cycle step with a probability greater than zero.

If you select the Default option when creating a sales methodology, and there is already an active default methodology, the system produces this message when you attempt to save the sales methodology record:

A default Sales Methodology, <Methodology Name>, already exists. Click Yes to make the current sales methodology default or No to preserve the existing default sales methodology.

If you click Yes, the system deselects the Default option on the existing default methodology, and the current record becomes the new default methodology. If you click No, the system deselects the Default option on the current record, and the existing default methodology remains the default.

Sales Methodology Usage

After you have set up sales methodologies, you can attach them to the opportunity records that the sales team generates. Attaching a sales methodology to an opportunity enables the system to accurately calculate the pipeline amount associated with each opportunity. It also assists sales representatives in completing the sales cycle by providing detailed information about what tasks and activities should be completed at each step in the cycle. Lastly, it assists sales representatives by enabling them to assign and view the sales drivers that are most important in winning the potential customer's business.

Prerequisites

Before you complete the tasks in this section:

Verify that sales driver and sales driver importance codes are set up in UDC tables 90CB/CA and 90CB/IM, respectively.

Additionally, if the organization chooses to associate action plans with sales cycle steps, you must define those action plans before you can add them to a sales methodology.

See *PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, "Setting Up Foundation Calendar".

Forms Used to Set Up Sales Methodologies

Form Name	Form ID	Navigation	Usage
Search for Sales Methodologies	W90CB050A	Sales Force Automation Setup (G90CA03), Sales Methodology	Access the forms to set up a sales methodology.
Add Sales Methodology	W90CBSMA	Click Add on the Search for Sales Methodologies form.	Define the name of the sales methodology.
Sales Methodology - Manage <Methodology Name>	W90CB050B	Click Save and Continue after you enter the name of the sales methodology on the Add Sales Methodology form.	Set up a sales methodology.

Setting Up Sales Methodologies

Access the Sales Methodology - Manage <Methodology Name> form.

Sales Methodology - Sales Methodology - Manage Technology Sales Methodology

Sales Methodology

Detail

Save Changes Undo Changes Close

Description: Technology Sales Methodology

☐ Default ☐ Inactive

Sales Cycle

Find Active Records Find Inactive Records

Records 1 - 5

	Inactive	Name	Description	Probability	Months to Close	Step #
☒	☐	Needs Assessment	Investigate Business Drivers	10	6	
☐	☐	Product Demonstration	Demonstrate proposed solution	30	3	
☐	☐	Proposal	Submit proposal	75	2	
☐	☐	Negotiate	Negotiate terms and conditions	90	1	
☐	☐	Won Business	Won new business	100	0	

Sales Methodology - Manage <Methodology Name> form

Default

Select this option to specify that this is the default sales methodology. When you enter a new sales opportunity, the system automatically populates opportunity records with the default sales methodology. If necessary, you can change the methodology. You can have only one active default sales methodology at any time. The default methodology must have at least one sales cycle step with a probability greater than zero.

Inactive

Select this option to specify that the methodology is no longer active. You can reactivate a methodology at any time by deselecting this option.

Inactive

Select this option to specify that a sales cycle step is inactive. You can reactivate the sales cycle step at any time by deselecting this option.

Name

Enter the name of the sales cycle step.

Probability

Enter the numeric probability, in whole numbers, that the sale will eventually close successfully. For example, if there is a 10 percent chance that sales that are currently in the Proposal step will close successfully, enter *10* in the Probability field for the Proposal sales cycle step. Values are *0* to *100*.

The Probability field is used in these ways:

When the sales cycle step is selected in an opportunity record, the value in the Probability field is multiplied by the value in the Potential Amount field on the opportunity. The resulting amount is included in the pipeline. The value in the Probability field is also used to determine in which bracket of the Pipeline tab the result of the previous equation displays. For example, if the Probability is 25 percent, and the value in the Potential Amount field is *1,000,000*, then 250,000 would be added to the pipeline in the 20-29 percent bracket.

Months to Close

Enter the number of months it should take a sales representative to close the sale from the time the specified sales cycle step begins. For example, if it should take 3 months to close a sale from the time that the Proposal sales cycle step begins, enter 3 in this field for the Proposal sales cycle step.

This field is used to populate the Closed Date field on the Opportunity Detail form. The Closed Date is calculated by adding the number of months entered to the date the Cycle Step was selected on the Opportunity Detail form.

Step #

Enter the sequence number associated with the sales cycle step. This field controls the order in which the system displays the sales cycle steps on the Sales Methodology and Opportunity Detail forms.

Pipeline Exclude

Select this option if you do not want any monetary amounts associated with this sales cycle step to be included in the pipeline.

Action Plan

Enter the action plan associated with this sales cycle step.

The activities of the selected action plan will be assigned when the sales representative selects this sales cycle step on the opportunity record.

Category

Enter the category code that best defines a customer or opportunities main concerns or motivators associated with a sale. Values for this field are stored in UDC 90CB/CA.

Short Description

Enter a short, descriptive title that represents the customer or opportunities concern or motivator. For example, you might enter *Budget issues are main concern* in this field.

Long Description

Click the link to access a free-form text box. You can enter additional information about the concern or motivator in this text box.

Importance

Enter the importance of the sales driver, using a numeric value. This value assists sales representatives in identifying how important the information captured in the sale driver is to the client and their business.

Setting Up Qualification Scripts

This section provides an overview of qualification scripts, and discusses how to:

- Create qualifications.
- Create questions and answers.

Understanding Qualification

It is important that the sales team carefully qualify leads and opportunities to avoid wasting time and resources. To help with the qualification process, you can set up qualification scripts that sales representatives can use to determine whether a lead or opportunity is qualified.

The sales representative can associate a qualification script with the lead or opportunity they are working with, ask the questions that are associated with that script, and enter the answers into the system. The system automatically scores the lead or opportunity based on the responses. If the score is greater than the qualification goal for the associated script, the lead or opportunity is qualified. If the score is less than the qualification goal, the lead or opportunity should not be pursued.

These programs are used to create qualification scripts:

- CRM - Manage Qualification Scripts program (P90CB040).
- CRM - Qualification Script Detail-Add (P90CB043).
- Qualifications - Qualification Answers Search & Select program (P90CB045).
- Qualification Object Tab program (P90CB044).

These tables are used to store qualification information:

- F90CB040
- F90CB041
- F90CB042
- F90CB043

Using the qualification programs, you set up qualifications, the questions that are associated with each qualification, and the answers that are associated with each question. You can assign values to the questions in a script. You can also assign values to the answers to those questions. The system uses these values to calculate the lead or opportunity's qualification score.

Qualifications

To begin creating a script, you must first create qualifications. You use qualifications to classify the questions that you create later in the process. You can group questions according to any guidelines you choose. For example, you might choose to group questions according to product lines. Therefore, you must create a qualification for each product line. You can then create questions for each of the qualifications. When you enter a lead or opportunity, you can choose a qualification. Only the questions associated with that qualification appear for that lead or opportunity.

For example, if an organization sells mountain bikes, road bikes, and bike accessories, you might set up these qualifications:

- Mountain Bike Sales
- Road Bike Sales
- Bike Accessory Sales

When you create a qualification, you enter lead and opportunity thresholds. Thresholds represent the scores that the lead or opportunity must meet or exceed to be qualified.

You would then create questions for each of the classifications, along with their associated answers. When a sales representative tries to sell mountain bikes, he or she can use the Mountain Bike Sales qualification to determine whether the lead or opportunity is qualified. The Mountain Bike Sales qualification would include all of the mountain bike-related questions and answers that were entered into the system.

Note. It is not mandatory that the lead or opportunity meet the threshold value. The score will not prevent a lead from being converted to a customer, or an opportunity from becoming a sales order. The numbers serve only as a guide.

Additionally, once you associated a qualification with a lead or an opportunity, the qualification becomes read-only, and cannot be updated. Therefore, if you find that you must modify a script after it has been associated with a lead or opportunity, you can copy the existing script, make any necessary modifications to the newly-created script, and then mark the existing script as inactive. The inactive script will no longer be available to be attached to leads or opportunities.

Qualification Questions

After you create qualifications, you create questions for the qualification. The questions you create appear when a sales representative selects the qualification when working with a lead or opportunity.

When you add questions to a qualification, you are required to enter a sequence number. Sequence numbers determine the order in which the questions appear. If you enter *1*, the question appears first, and if you enter *2*, it appears second, and so on.

You are also required to enter one of these question types for each question:

- Leading
- Rhetorical
- Open ended

The question type does not affect how the question appears. It is informational only, and might help users to understand how the question should be posed. After you select a question type, you enter the question, which is the text that appears to the sales representative.

You also enter weighting points for each question. Weighting points are used to assign a value to each question. For example, among five questions you might have two key questions, one fairly important question, and two questions of minimal importance. Therefore, you might assign these weighting points to each question:

Question	Importance	Weighting Points
Question 1	High	15
Question 2	High	15
Question 3	Medium	10
Question 4	Low	5
Question 5	Low	5

The sum of the weighting points for all questions that are associated with a qualification represent 100 percent, and is used as the basis for calculating the respondents' scores. In this example, the total weighting points for the script is 50. When the respondent answers the questions, the system calculates a score for each question, and totals those scores when the script is complete. The system then divides the respondent's total points by the total number of points in the script to determine the script score. For example, if the respondent received 38 points, the system performs this calculation to determine the respondent's script score: $38 \div 50 = .76$. Therefore, the respondent's score is 76 percent, or 76. If this score is greater than or equal to the lead or opportunity threshold, the respondent is considered qualified.

Answers

After you create questions, you must enter possible answers for each question. When attempting to qualify a lead or opportunity, the sales representatives can view the possible answers for each question that they ask. You can enter a sequence number for each answer, which controls the order in which the answers appear.

You can enter weighting percentages for each answer that you create. The weighting percentage is the percentage of the weighting points that are added to the qualification score when the answer is chosen. The system multiplies the answer's weighting percentage by the weighting points associated with the question to determine the number of points towards the final score. The system then adds up the totals for all of the questions to determine whether the lead or opportunity meets the qualification thresholds.

For example, if a question has 100 weighting points, and you assign a weighting percentage of 100 to an answer, if that answer is selected, 100 points are counted towards the final score. If the weighting percentage associated with the chosen answer is 20 percent, then 20 points are added to the qualification score.

The weighting percentages associated with the answers to a single question do not have to equal 100. Instead, they are used to calculate the total number of qualification points that are earned when the answer is selected.

For example, you might ask the question, "Are you in the market to buy mountain bikes right now?" This question has 50 weighting points associated with it. This example illustrates how you might assign weighting percentages to the possible answers:

Answer	Weighting Percentage	Calculation	Points Toward Final Score
Yes	100	$50 * 1.00 = 50$	50 points
Maybe	50	$50 * .50 = 25$	25 points
No	10	$50 * .10 = 5$	5 points

Qualification Script Example

A sales representative is attempting to qualify a lead. The representative uses a qualification script that has a lead threshold of 60. Therefore, in order for this lead to be considered qualified, the qualification score must be 60 or higher. The script has these three questions:

Question	Weighting Points	Answers - Weighting Percentage
Question 1	20 Points	Answer A - 100 Answer B - 75 Answer C - 25
Question 2	50 Points	Answer A - 100 Answer B - 50 Answer C - 20

Question	Weighting Points	Answers - Weighting Percentage
Question 3	100 Points	Answer A - 100 Answer B - 80 Answer C - 0
Total	170 Points	170 points possible

When the sales representative runs through the script with the lead, these answers are given:

Question	Answer	Calculation	Points Toward Score
Question 1 (20 points)	Answer B (75 percent)	$20 * .75 = 15$	15 points
Question 2 (50 points)	Answer C (20 percent)	$50 * .20 = 10$	10 points
Question 3 (100 points)	Answer B (80 percent)	$100 * .80 = 80$	80 points

This gives the lead a total of 105 weighting points out of the possible 170 weighting points. 105 points is 62 percent of 170 points, giving the lead a qualification score of 62. Because this number is greater than the lead threshold percentage of 60, the lead is considered qualified.

See Also

[Chapter 5, “Managing Sales Leads,” Maintaining and Updating Leads, page 56](#)

[Chapter 6, “Managing Sales Opportunities,” Managing and Maintaining Opportunities, page 74](#)

Forms Used to Set Up Script Information

Form Name	Form ID	Navigation	Usage
Search for Qualifications	W90CB040B	Sales Force Automation Setup (G90CA03), Qualifications	Select existing qualifications or access the forms to create new qualifications.
Add Qualification	W90CB043B	Click Add on the Search for Qualifications form.	Create a qualification.
Manage <Qualification Name>	W90CB040A	Select a qualification on the Search for Qualifications form or click Save and Continue on the Add Qualification form.	Create questions and answers for a qualification.

Creating Qualifications

Access the Add Qualification form.

After you have created the qualification, you can click Save and Continue to enter questions and answers for the qualification, or you can click Save and Close to exit the program. If you exit the program, you can access the qualification at a later time to enter questions and answers. If you want to enter multiple qualifications at once, you can click Save and Add New.

Lead Threshold %	Enter the percentage score the lead should meet or exceed before being converted. Value entered must be between 0 and 100. This value is a guideline only, and does not deter a lead from being converted to an opportunity.
Opportunity Threshold %	Enter the percentage score the opportunity should meet or exceed before being pursued. This value is used as a guideline only, and does not deter an opportunity from being converted to a quote or sales order. Value entered must be between 0 and 100.
Inactive	Select this option to specify that the script is no longer active. If this option is selected, the script will not appear when you search for active scripts. You can reactivate a script at any time by deselecting this option.

Creating Questions and Answers

Access the Manage <Qualification Name> form.

Qualification - Qualification - Manage Qualify Bike Sales Leads

Qualification

Detail

Save Changes

Undo Changes

Copy

Close

Name: Lead Threshold %: Opportunity Threshold %: ☐ Inactive

Qualification Questions

Records 1 - 4

		Question Seq No.	Question Type	Weighting Points	Question Text
☒		1	LEAD	50	Do you currently own a bike?
☐		2	LEAD	50	Are you interested in purchasing a bike within the next year?
☐		3	LEAD	25	Are you interested in mountain bikes or road bikes?
☐					

Delete

Qualification - Manage <Qualification Name> form (1 of 2)

Qualification Answers

Records 1 - 3

		Answer Seq No.	Weighting %	Answer Text
☐		1	20	Yes
☒		2	80	No
☐				

Delete

Qualification - Manage <Qualification Name> form (2 of 2)

After you create a question, you can enter answers for that question. To associate answers with the correct question, you must select the question for which you want to enter answers before you enter the answers. You can enter all of the questions first, and then enter answers for each question, or you can enter answers for each question immediately after you enter the question. You can enter questions, save information, exit the script, and return to the script at a later time to enter answers.

Question Seq No	Enter the numeric value that represents the order in which the question appears in the script. The lower the number, the earlier the question appears. For example, a question with a sequence number of 1 appears before a question with a sequence number of 4.
Question Type	Enter the type of question that you are entering. Values are stored in UDC 90CB/QT, and include: <i>LEAD</i> : Leading <i>OPN</i> : Open Ended <i>RETR</i> : Rhetorical
Weighting Points	Enter the total number of points that can be counted towards the qualification score for a lead or opportunity. The system multiplies the weighting points by the weighting percentage that is assigned to the associated answer to determine the actual number of points that are added to the qualification score. For example, you might assign 100 weighting points to a question. If the lead or opportunity selects an answer with a weighting percentage of 50, the system adds 50 points ($.50 \times 100$ points) to the qualification score.
Answer Seq	Enter the numeric value that represents the order in which the answers for each question appear. Answers with lower numbers appear at the top of the grid.
Weighting %	Enter the percentage of weighting points that a lead or opportunity gets when they select this answer. The percentage value that you enter in this field is multiplied by the weighting points of the associated question to determine the number of points that are added to the lead or opportunity's qualification score. For example, if the lead or opportunity selects an answer with a weighting percentage of 75, and the associated question had 100 weighting points, the system adds 75 points ($.75 \times 100$ points) to the qualification score.

CHAPTER 4

Managing the Sales Force

This chapter provides an overview of the sales force and discusses how to:

- Add sales team members to territories and industry groups.
- Assign sales team members to customers.
- Review sales team information.

Understanding the Sales Force

Many organizations sell products and services to different industries in diverse geographic locations. These geographic locations are typically referred to as territories. To better serve customers, organizations typically specify which territories and industries each sales team member supports.

By defining territory and industry information for the sales force, you can allow the system to automatically assign sales team members to customers based on territory and industry information. This process is known as aligning the sales force.

When you align the sales force, the system automatically assigns sales team members to all of the customers in the system, based on territory and industry groupings. You can realign the sales force as often as the business demands.

You can also specify whether a customer should be excluded from the automatic alignment process. For example, the organization might have a customer that works with a specific sales team and will not work with any other sales team. In this instance, you can exclude that customer from the automated alignment process and manually assign the appropriate sales team members to the customer.

Adding Sales Team Members to Territories and Industry Groupings

This section provides an overview of sales team territories and industry groupings, list prerequisites, and discusses how to:

- Add sales team members to a territory.
- Add sales team members to an industry grouping.

Understanding Sales Teams by Territory and Industry Groupings

Before you can align the sales force, you must define which territories and industries each sales team member supports. You can add individual employees and partners, along with sales groups, to a territory and to an industry grouping. You can then specify the dates during which each sales team member is effective, or active, on those territories and industry groupings.

Territories

You use the Territory Application program (P90CA140) to add sales team members to a territory. When you assign a sales team member to a territory, the system creates a record in the F90CA14A table.

You can add employees, partners, sales team members, or sales groups to a territory. You can add a sales team member to multiple territories. You can also enter effective dates for each member that you attach to a territory. These dates specify when the sales team member is actively supporting the specified territory. If you do not enter effective dates, the system uses the system date as the beginning effective date, and 12/31/2015 as the default expiration date.

Note. If you want to assign sales groups to a territory, you must first create sales groups. You can set up sales groups using search types of E, C, and SG. We recommend that you select one search type to use for all sales groups that are used by the CRM Sales Force Automation system. Then you must specify that search type in the processing options for the Territory Application program (P90CA140).

For example, if a sales team member has just begun employment with the organization, he might be responsible for supporting a small territory, Territory A, during his first month of employment. After he successfully completes the month, you might also assign him to Territory B and C.

This example illustrates how you might add the employee to territories:

Territory	Beginning Effective Date	Expiration Date
Territory A	01/01/2005	12/31/2015
Territory B	02/01/2005	12/31/2015
Territory C	02/01/2005	12/31/2015

If the employee moved, or due to resource, territory, or industry group reorganization, was no longer supporting on of the territories, you can enter an expiration date on the territory. After the expiration date, the employee would no longer be considered an active sales team member in that territory.

Industry Groupings

You use the Industry Grouping Application program (P90CA12A) to add sales team members to an industry group. When you assign a sales team member to an industry group, the system creates a record in the F90CA12B table.

You can add employees, partners, and sales groups to one or more industry groupings. You can also enter effective dates for each sales team member that you attach to an industry grouping. These dates are used to specify when the sales team member is actively supporting the specified industry grouping. If you do not enter effective dates, the system uses the system date as the beginning effective date, and 12/31/2015 as the default expiration date.

For example, a sales team member might initially be responsible for supporting only Industry 1 during his first month of employment. After he successfully completes the first month of employment, he is then responsible for supporting Industry 1 and Industry 2.

This example illustrates how you might add the sales team member to industry groupings:

Industry Grouping	Beginning Effective Date	Expiration Date
Industry 1	01/01/2005	12/31/2015
Industry 2	02/01/2005	12/31/2015

Prerequisites

Before you complete the tasks in this section:

- Enter sales team members into the system.
Sales team members can be employees, partners, or sales groups.
- Create sales territories.
- Set up industry groupings.

See Also

Chapter 3, “Setting Up Sales Fundamentals,” Setting Up Territories and Industry Groupings, page 17

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, “Setting Up CRM Constants and Employees,” Managing CRM Employees

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, “Managing Partners”

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook, “Setting Up the System for Sales Order Management,” Setting Up Commission Information

Forms Used to Add Sales Team Members to Territories and Industry Groupings

Form Name	Form ID	Navigation	Usage
Search for Territories	W90CA140K	Sales Force Automation Setup (G90CA03), Territory	Select a territory.
Territory - Manage <Territory Name>	W90CA140A	Select the territory on the Search for Territories form.	Select the territory to which you want to add sales team members.
Search for Industry Grouping	W90CA12AA	Sales Force Automation Setup (G90CA03), Industry Grouping	Select an industry grouping.
Industry Grouping - Manage <Industry Grouping Name>	W90CA12AA	Select the industry grouping on the Search for Industry Groupings form.	Add sales team members to an industry grouping.

Adding Sales Team Members to a Territory

Access the Territory - Manage <Territory Name> form. Select the Sales tab. Click the Sales Team link.

To add sales team members to a territory:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the territory, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area on the Sales tab of the Territory - Manage <Territory Name> form.

3. To remove a member, you can select that member and then click the Remove button.

We suggest that you only remove members if you have accidentally added them to the territory. If they are no longer active on the territory, you can enter an expiration date for the employee, partner, or sales group.

4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Detail Power Edit form, enter the dates during which the sales team member is actively supporting the territory.

Adding Sales Team Members to an Industry Grouping

Access the Industry Grouping- Manage <Industry Grouping Name> form. Select the Sales tab. Click the Sales Team link.

To add sales team members to an industry grouping:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the industry grouping, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area on the Sales tab of the Industry Grouping - Manage <Industry Grouping Name> form.

3. To remove a member, you can select that member and then click the Remove button.

We suggest that you only remove members if you have accidentally added them to the territory. If they are no longer active on the industry grouping, you can enter an expiration date for the employee, partner, or sales group.

4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Detail Power Edit form, enter the dates during which the sales team member is actively supporting the industry grouping.

Assigning Sales Team Members to Customers

This section provides an overview of assigning sales teams to customer records and discusses how to:

- Entering customer overrides for sales alignment.
- Run the Sales Team Alignment TC program (R90CA18A).
- Manually assign sales team members to customers.
- Manually assign sales team members to opportunities.

Understanding Sales Force Alignment

You can set up the system to automatically assign sales team members to customers based on their territory and industry groupings. Allowing the system to automatically align the sales force can assist the organization in assigning the sales representatives in the closest geographic proximity, and with the most industry knowledge, to each account, which can improve the likelihood of a successful sales transaction.

The alignment process is based on territory and industry groupings. Therefore, after you set up sales team members in the system, you must assign each sales team member to territories and industry groupings. You use effective dates to determine when a sales team member is active in a specific territory or industry grouping.

After you enter territory and industry grouping information for the sales force, when you enter new customer records, or change industry, primary address, or territory information on existing customer records, the system automatically assigns all active sales team members with the appropriate industry and territory classifications to those records. Alternatively, you can update the sales teams associated with customer records using a batch process.

After the sales team has been assigned to a customer, when you create opportunities for that customer, the system assigns the active sales team members from the sold to, ship to, or both customer's sales team to the opportunities that are created for that customer based on the CRM System Constants. When you convert the opportunity to a quote or a sales order, the system copies all active sales team members, whose Apply Commission option is selected, from the opportunity record to the quote or sales order.

Note. Once an opportunity, quote, or sales order has sales team members assigned to it, the alignment process does not change that sales team, even if the sales team of the related customer is changed. To add or remove members from the sales team of an opportunity, quote, or sales order, you must manually change the sales team.

Territory Assignment

When you enter a customer record, you specify the address for that customer. You can enter multiple addresses for each customer. The system compares the customer's primary address to the address information associated with each sales territory. The system then assigns the appropriate territory to customer record. If necessary, you can manually override the territory that the system assigns using customer override options.

When assigning a territory to a customer, the system first tries to match the postal code from the customer address, including the four-digit extension, to the postal codes assigned to a territory. If the customer's postal code is not associated with any of the territories, the system then tries to match the first five digits of the customer's postal code to the postal codes assigned to a territory. If no match is found, the system then tries to match the city and state from the customer address to the city and state assigned to a territory. If the customer's city and state combination is not associated with any of the territories, the system then tries to match the city from the customer address to the city associated with a territory. If no match is found, the system then tries to match the customer's state to the state associated with a territory. Lastly, if the customer's state does not exist on any of the territories, the system tries to match the country from the customer's address to the country assigned to a territory. If no matches are found, the system does not assign a territory to the customer record.

Industry Grouping Specification

When you enter customers, you must specify the industry classification associated with that customer. The system uses this information to determine which industry grouping the customer belongs to, and to determine which sales team members are actively supporting that grouping at the time the record is added or changed.

You can enter only one industry for each customer record. If the industry is not associated with an industry grouping, the system does not assign an industry grouping to the customer record.

The Automatic Alignment Process

After you set up sales team members, territories, and industry groupings, you can then align the sales force. The alignment process happens automatically each time a customer record is added or changed. The system assigns sales team members to each customer record when the record is added or changed, based on the territory and industry grouping. After the sales team is assigned to a customer, the active members of that sales team are copied to opportunity records that are created for that customer. However, once a sales team has been added to an opportunity, the sales force alignment process does not change the opportunity's sales team. The alignment process affects only customer sales team records.

When sales team members are assigned to a customer, the system creates a record in the F42140 table.

The automatic alignment process consists of these steps:

1. You enter a new customer record, or change the industry, territory, or primary address of an existing customer record.
2. If the customer's existing sales team includes members who are no longer active in both the territory and the industry grouping, the system adds an expiration date to those members, which removes them from the active sales team.
3. If the customer's existing sales team includes members whose beginning effective date is greater than the system date, the system does not remove that member from the sales team or change the effective dates for that member.
4. The system retrieves the customer's primary address information to determine which territory to assign to the record.
5. The system identifies all sales team members who are active in the specified territory.
A sales team member is considered active if their beginning effective date is on or before the system date, and their expiration date is on or after the system date.
6. The system retrieves the customer's industry grouping code.
7. The system identifies all sales team members who are active for the specified industry grouping.
A sales team member is considered active if their beginning effective date is on or before the system date, and their expiration date is on or after the system date.
8. The system adds all of the sales team members who are active in *both* the specified territory *and* the specified industry grouping to the customer's sales team.

The system assigns the system date as the begin date for all newly added members of the sales team.

The Batch Alignment Process

At times, the organization might find it necessary to use a batch process to realign the sales force. For example, if members of the sales force leave the organization, you can use a batch process to update records rather than manually updating each customer sales team on which the employees worked. Similarly, if you add new territories or change existing territories, you can use a batch process to update records.

To process batch alignment, you run the Sales Team Alignment TC program (R90CA18A, version XJDE0007). This program performs all of the steps that the automated alignment process performs, with one exception. You do not need to physically change the customer record in order to update the sales team. When you run the Sales Team Alignment TC program, the system determines whether any changes have been made to territories or industry groupings since the program was run last. If a territory or industry grouping changed, the system updates all customer records associated with those territories or industry groupings. The system also looks at customer records whose Industry Grouping or Territory fields are blank to determine if the changes to the industry groupings or territories might affect those customers.

Remove a Member from a Sales Team

If an employee leaves the organization, you can remove them from the sales team by entering an ending effective date on the sales team member record. By entering an ending effective date, as opposed to deleting the member from the sales team, you can keep an audit trail of all of the sales team members that worked on an account at any given time.

We recommend that you use the Delete option only if you accidentally add an employee to a sales team.

Exclude Accounts from Automated Alignment

In certain instances, you might decide that you do not want the system to automatically assign the sales team to a customer. Using customer overrides, you can exclude an account from the sales alignment process.

For example, if a valuable customer has decided that they will work only with certain sales members, you can set up their account so that the system does not assign sales team members based on territory and industry grouping. When the Sales Team Override flag is selected, all modifications to the sales team must be done manually.

When you specify that a customer should not be included in the alignment process, the system does not make any changes to the sales team members associated with that record, even if the territories or industry groups associated with the customer change.

Manually Assign Sales Team Members

At times, the organization might want to manually assign sales team members to customers and opportunities rather than using the automated alignment process.

For example, several customers might have developed a strong relationship with a particular sales member or sales team. To satisfy these customers you might decide to assign these sales team members to those accounts, even though the sales team members do not actively support the territories or industry groupings associated with their accounts.

Similarly, you might want to add a product or industry expert to a particular customer to help win a sale, even though that person might not actively support the territory in which the customer resides. In this situation, you can manually add the expert to the opportunity sales team. You can also exclude the accounts from the automated alignment process to ensure that the sales team does not change each time the account is updated or each time the Sales Team Alignment TC program is processed.

Sales Team Roles

After you assign sales team members to a customer, you can assign each member of the team a role. Valid role types are stored in UDC H42/RT. Role types are informational codes that specify the job that each member of a sales team should perform. Examples of role types include:

- Account Manager
- Sales Representative

- Sales Support

Forms Used to Assign Sales Team Members to Accounts

Form Name	Form ID	Navigation	Usage
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer Management	Select a customer.
Customer - Manage <Customer Name, Company>	W90CA080A	Select a customer on the Search for Customers form.	Access customer information, enter customer overrides, and manually assign sales team members.
Sales Team Revisions	W90CA08AB	Click a sales team member on the Sales Team section of the Customer - Manage <Customer Name, Company> form.	Assign roles to sales team members.
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity Management	Select an opportunity.
Opportunity - Manage <Opportunity Name>	W90CB020A	Select an opportunity on the Search for Opportunities form.	Access opportunity information and manually assign sales team members.

Entering Customer Overrides for Sales Alignment

Access the Customer - Manage <Customer Name, Company>. Select the Customer tab. Click the Detail link.

Customer - Customer - Manage Unlimited, The, PeopleSoft E1

Customer | Contact and Partner | Activities | Sales | Service | Attachments

Detail | [Address and Phone](#) | [Financial](#) | [Customer Options](#) | [Service Information](#) | [Related Links](#)

Save Changes | Undo Changes | Close

Customer Number: 1531 Company: 00000

Name: Unlimited, The Long Address Number:

Search Type: T *Tenants* Status: Active

Tax ID: Industry Classification:

Details | Related Entities | Classification

Business Unit: 1 *Financial/Distribution Comp...*

Address Type: X *Bill To and Ship To Address*

Stock Ticker: Stock Exchange:

Tier: Account Open: 21/04/00

Industry Grouping: 0 *Informational: No Industry G...* ☒ Sales Team Override

[Territory](#): 4 *Northeast 1* ☒ Territory Override

Annual Revenues: Number of Employees: 0

Growth Rate: 0 Year Started:

Customer - Manage <Customer Name, Company> form: Customer tab: Detail link

Sales Team Override

Select this option if you do not want the system to automatically assign sales team members to the customer based on the territory and industry grouping. If you select this option, any changes to the sales team must be done manually.

Territory Override

Select this option if you want to manually override the territory that is assigned to the account. The system determines the territory by comparing the specified customer address to the address information of each sales territory.

If you select this option, the system enables the Territory field, which enables you to enter an override value. The system uses this value when performing sales team alignment.

Territory

Enter the territory in which the customer belongs. You can enter a value in this field only if you select the Territory Override option. If you do not select the Territory Override option, the value in this field is supplied by the system, and the field is disabled.

Running the Sales Team Alignment TC program (R90CA18A)

Sales Force Automation Setup menu (G90CA03), Sales Team Alignment UBE.

Manually Assigning Sales Team Members to Customers

Access the Customer - Manage <Customer Name, Company>. Select the Sales tab. Click the Sales Team link.

To manually assign sales team members to a customer:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the sales team, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area of the Sales tab.

3. To remove a member, you can select that member and then click the Remove button.
We suggest that you only remove members if you have accidentally added them to the sales team. If they are no longer active on the team, you can enter an expiration date for the employee, partner, or sales group.
4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Revisions form, enter the dates during which the sales team member is actively supporting the customer.

Manually Assigning Sales Team Members to Opportunities

Access the Opportunity - Manage <Opportunity Name>. Select the Sales tab. Click the Sales Team link.

To manually assign sales team members to an opportunity:

1. Click the Assign Sales Team button.
2. On the Sales Team Search and Select form, search for the employees, partners, or sales groups that you want to add to the sales team, select each sales team member by placing a check mark next to their record, and then click Select.

The sales team members that you selected now appear in the detail area of the Sales tab.

3. To remove a member, you can select that member and then click the Remove button.
We suggest that you only remove members if you have accidentally added them to the sales team. If they are no longer active on the team, you can enter an expiration date for the employee, partner, or sales group.
4. To set the beginning effective and expiration dates for a member of the sales team, click that employee, partner, or sales group's name.
5. On the Sales Team Revisions form, enter the dates during which the sales team member is actively supporting the opportunity.

Reviewing Sales Team Information

This section provides an overview of sales team information and discusses how to:

- Review customers associated with sales team members.
- Review partners associated with sales team members.
- Review opportunities associated with sales team members.

Understanding Sales Team Information

After you enter sales team members into the system, you can assign those members to customer accounts. Hopefully, as the members of the sales team progress, they generate additional customers, opportunities, and partner relationships.

You can review sales information for each sales team member, such as:

- The customers that are associated with sales team members.
- The partners that are associated with sales team members.
- The opportunities that are associated with sales team members.

When you view this information, you have the option of viewing information in two formats:

- Employee only
- Employee and subordinates

The employee only view is the default view. To view information about the employee and their subordinates, click the Expand Hierarchy button on any of the review forms. To return to the employee-only view, click the Collapse Hierarchy button.

For example, Jane Ryan has 12 employees who report to her. When you initially view information for Jane, you see only the customers, partners, or opportunities that she is directly associated with. If you click the Expand Hierarchy button, you can view all of the customers, partners, and opportunities for Jane and the 12 employees who report to her. When you click the Collapse Hierarchy button, you return to viewing only Jane's information.

Customer Information

Click the Customer link to review the list of customers with which a sales team member is associated. This information can help you to determine the number of customers each member of the sales team is currently working on. This type of information can assist the organization with resource planning and shifting. For example, you might determine that one sales representative is currently supporting 20 customers, while another representative is supporting only three. Therefore, it might be necessary to reassign sales representatives from one territory or industry to another.

Partner Information

You can review a list of partners with whom a sales representative is working.

Opportunities

You can review all of the current opportunities with which a sales representative is involved. This information can be useful in assessing the sales representative's work load and sales productivity. When you click the Opportunity link, you can see at a glance this information for all of the active opportunities associated with the sales representative:

- Customer
- Role
- Sales cycle
- Probability
- Close date
- Potential amount

Forms Used to Review Sales Team Information

Form Name	Form ID	Navigation	Usage
Search For Employees	W90CA040F	Periodic Sales Force Automation Processing (G90CA02), Employee Management	Select existing employees for review or revision.
Employee - Manage <Employee Name>	W90CA040A	Select an employee from the Search for Employees form.	Review basic employee information.

Reviewing Customers Associated with Sales Team Members

Access the Employee - Manage <Employee Name>. Select the Customer and Partner tab. Click the Customer link.

Employee - Employee - Manage Allarno, Yasmine

Employee Customer and Partner Sales Service Attachments

Customer | Partner

Close

Find Select

Select a Query Save Query Edit Queries

Records 1 - 5

	Customer Number	Customer Name	Company	Role	City
☒	150	Property Management Company	00000		Denver
☐	500	Gas StationA	00000		Houston
☐	505	Consignment Agent	00000		Atlanta
☐	705	Consignment Agent - COP	00000		Bogota
☐	726434	Heath Cycles	00000		Charlotte

Expand Hierarchy

Employee - Manage <Employee Name> form: Customer and Partner tab: Customer link

Select a Query

Specify whether you want to view all, current, expired, or future partners associated with the employee by selecting a value in this field. Selecting a query before you click Find enables you to minimize the number of records that appear on the form. To clear the form and begin a new search, select *Clear*, and then click Find.

Reviewing Partners Associated with Sales Team Members

Access the Employee - Manage <Employee Name>. Select the Customer and Partner tab. Click the Partner link.

Employee - Employee - Manage Allarno, Yasmine

Employee Customer and Partner Sales Service Attachments

Customer | **Partner**

Close

Find

Records 1 - 2

☐	☐	Partner Number	Alpha Name	ST	City
☐	☒	1352	Ino Incorporated	TX	Paris
☐	☐	41352	MegaCorp	CO	Denver

Assign Partners Remove

Employee - Manage <Employee Name> form: Customer and Partner tab: Partner link

Reviewing Opportunities Associated with Sales Team Members

Access the Employee - Manage <Employee Name>. Select the Sales tab. Click the Opportunity link.

Employee - Employee - Manage Allarno, Yasmine

Employee Customer and Partner **Sales** Service Attachments

Opportunity | [Pipeline](#)

Close

Find Select

Select a Query Save Query [Edit Queries](#)

Records 1 - 2

	Description	Sold To Customer	Sold To Customer Name	Sold To Contact	Ship To Customer
☒	Capital System Opportunity	4242	Capital System567890		4242
☐	ABC Inc. Opportunity	333462	ABC Inc.		333462

Employee - Manage <Employee Name> form: Sales tab: Opportunity link

CHAPTER 5

Managing Sales Leads

This chapter provides an overview of leads and discusses how to:

- Enter a lead.
- Maintain and update leads.
- Convert leads.

Understanding Leads

Leads are one of the most important pieces of the sales cycle. Leads represent possible sales opportunities to an organization. You use the CRM - Manage Leads program (P90CB010) to enter leads. The records that you enter are stored in these tables:

- F90CB010
- F90CB030
- F90CB01A
- F90CB042
- F90CB043

When you enter a lead into the system, you must include these required pieces of information:

- First name
- Last name
- Company name

You also specify the contact person's title, phone, and address information, the industry the lead is associated with, the source of the lead, and the date that the lead was established.

You can enter leads individually, or you can import a list of leads into the system by using the Import Leads program (P90CB015). After you enter a lead into the system, you can perform these tasks:

- Enter category codes for a lead.
- Enter additional addresses for a lead.
- Qualify a lead.
- Assign product interests to a lead.
- Assign activities to a lead.
- Link an action plan to a lead.

- Enter attachments to a lead.
- Assign partners to a lead.

Sales representatives use the information associated with the lead to assist them in determining if a lead is viable and worth pursuing. If the process is successful, you can convert the lead into an account. When you convert a lead, the system creates these records:

- Contact Record
- Customer Record
- Opportunity Record

Entering a Lead

This section provides an overview of the lead entry process and discusses how to:

- Enter leads.
- Import leads.
- Set processing options for the CRM - Manage Leads program (P90CB010).
- Set processing options for the Import Leads program (P90CB015).

Understanding Lead Entry

Before you can begin working with leads, you must enter basic information about those leads into the system. You can choose to enter leads individually, or you can import a list of leads from a spreadsheet. Depending on the source of the leads, the organization might choose to utilize both of these lead entry methods.

For example, if the organization purchases a list of leads, it might be easiest to import that list into the system rather than enter each lead individually. Importing leads can also reduce data entry errors. Alternatively, if you receive leads based on advertisements or individual referrals, you might choose to enter those leads manually as they are received.

When you enter leads into the system, you specify the main contact person's name, company, title, address, phone number, fax number, and email address. You also specify the lead's status, date and time of entry, industry, web URL, search type, and lead owner. Additionally, you can associate a qualification script with the lead. After you enter and save the lead, you can use the script to determine whether the lead is worth pursuing.

When you enter a lead using the CRM - Manage Leads program, the system automatically creates records in the tables:

- F90CB010
- F90CB030
- F90CB01A
- F90CB042
- F90CB043

These records include the default values that you specify in the processing options for the CRM - Manage Leads program unless you override this information during lead entry.

Import Leads

To import leads, the list of leads must be stored in a spreadsheet format. The columns on the spreadsheet must be in the same order as those on the Import Leads form. Therefore, it might be necessary to rearrange the columns on the spreadsheet or the form to ensure that data is imported into the correct fields.

You use the Import Leads program (P90CB015) to import leads. You can populate these fields when you import lead information:

- Company (required)
- Last Name (required)
- First Name (required)
- Phone Prefix
- Phone Number
- EMail
- Title
- Industry
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- Postal Code
- County
- Country
- Fax Prefix
- Fax Number
- URL

When you import leads, the system automatically updates these fields (if they are left blank during import) based on the values that you enter in the processing options for the CRM - Manage Leads program:

- Search Type
- Industry
- Status
- Lead Owner
- Date Received
- Qualification
- Qualification Goal
- Lead Source

To enter or update any additional information about the lead, you must manually enter or change the data after the lead has been imported.

Forms Used to Enter Leads

Form Name	Form ID	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead Management	Review and select existing leads, or access the forms needed to enter a new lead.
Add Lead	W90CB010D	Click Add on the Search for Leads form.	Enter a lead.
Lead - Manage <Lead Name>	W90CB010B	Select a record in the detail area of the Search for Leads form, and then click Select.	Update lead information.
Import Leads	W90CB015A	Select Import Leads from the Form menu on the Search for Leads form.	Import a list of leads.

Entering Leads

Access the Add Lead form.

Function Code

Enter the code that indicates the function the lead plays in the company. Examples include:

CO: Chief Officer

CON: Consultant

DIR: Director

MGR: Manager

STAF: Staff

SUPR: Supervisor

Industry

Enter the industry code associated with the lead. If the lead is converted to a customer, this information is used to determine the industry grouping for the customer. The industry grouping is then used to automatically assign sales team members to the customer record.

Search Type

Verify that the system populates this field with *P* (Prospect).

Lead Owner

Enter the Address Book number of the owner of the lead.

Lead Source

Enter the code that specifies the origin of a lead. Values are stored in UDC 90CB/LS, and might include codes to represent items such as marketing events, personal contacts, or customer referrals.

Status

Enter the current status of the lead. Values for this field are stored in UDC 90CB/ST. Examples of status codes include active, dead, or converted.

The system automatically assigns the lead an active status when the lead is entered, and changes the status to converted when the lead is converted to an account. To use any other status values, you must manually update this field.

Date Received

Review the date that the lead was entered into the system. This field is automatically populated when the lead is entered. You can manually override the information in this field if necessary.

Qualification

Select the name of the qualification script that is used to qualify the lead.

Qualification Goal

Review the value in this field to determine the qualification score that the lead must meet to be considered a qualified lead. The system populates this field when you select a qualification. You cannot override the value in this field.

Importing Leads

Access the Import Leads form.

To import leads:

1. On the Import Leads form, select Import Grid Data from the Tools menu.
2. When the import assistant appears, browse to the existing spreadsheet that contains the leads that you want to import.
3. Define the cell ranges that include the leads that you want to import.
4. Click Preview.

The data from the spreadsheet appears in the detail area of the form.

5. Review the data, make any necessary changes, and then click Continue.

The system validates the imported data against the values for each field and displays errors if invalid values exist. Fields that contain invalid values appear highlighted in the detail area.

6. Correct any errors and then click OK.

The system creates the leads and returns to the Search for Leads form, where you can verify that the leads were added successfully.

Setting Processing Options for the CRM - Manage Leads Program (P90CB010)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default settings that are used to process lead information.

- | | |
|--|---|
| 1. Default Lead Owner | Use this processing option to specify the lead owner to assign to new leads. If you leave this option blank, the system enters the logged in user's Address Book Number in the Lead Owner field. |
| 2. Default Qualification Script | Use this processing option to specify which qualification script to assign to new leads. If you leave this option blank, the system does not assign a qualification script to the lead. To qualify the lead, you must manually enter a script name in the Qualification Script field. |
| 3. Default Search Type | Use this processing option to specify the search type to assign to new leads. If you leave this option blank, the system assigns new leads a search type of <i>P</i> (Prospect). |
| 4. Default Industry | Use this processing option to specify the industry grouping that is assigned to new leads. If you leave this option blank, the system does not assign an industry to the lead. |
| 5. Default Primary Address Type | Use this processing option to specify the address type code that is used to identify a lead's primary address. If you leave this option blank, the system assigns address type B to the primary address. |
| 6. Default Lead Source | Use this processing option to specify the lead source to assign to new leads. If you leave this option blank, the system does not assign a lead source. Values are stored in UDC (90CB/LS). |

Display

These processing options specify how information is displayed on the lead forms.

- | | |
|---------------------------------------|---|
| 1. Display Convert Lead Button | Use this processing option to hide or display the Convert Lead button. Values are:

Blank: Do not display the Convert Lead button.
<i>1</i> : Display the Convert Lead button. |
|---------------------------------------|---|

Process

These processing options specify how the system processes lead information.

- | | |
|---|--|
| 1. Postal Code Editing | Use this processing option to activate postal code editing. Postal code editing verifies that the postal code exists in the F0117 table. If the postal code exists in the Postal Code Transactions table and the City, County, Country, and State fields are blank; the system uses the information from the Postal Code Transactions table. If the postal code does not exist in the Postal Codes Transactions table, the system returns a warning. Values are:

Blank or <i>0</i> : Do not activate postal code editing.
<i>1</i> : Activate postal code editing. |
| 2. Postal Code Address Retrieval | Use this processing option to activate Postal Code Address Retrieval. If the postal code is valid and address lines one through four are blank, address information can be retrieved from the F0118 table. If the processing option to activate with the Postal Code Selection Window for multiple addresses is set, all available addresses for the postal code are displayed. Values are:

Blank or <i>0</i> : Do not activate Postal Code Address Retrieval. |

- 1: Activate with the Postal Code Selection Window for multiple addresses.
- 2: Activate to retrieve the address information for a single address.

Versions

These processing options specify the program versions that the system uses to process lead information.

1. CRM Customer (P90CA087)	Use this processing option to identify the version of CRM Customer Processing Options (P90CA087) that the system uses to create a customer from a lead. If left blank, the system uses version ZJDE0001.
2. Work with Partners (P90CA050)	Use this processing option to identify the version of Work with Partners (P90CA050) that the system uses to retrieve information about all the features and options that are related to partners. If left blank, the system uses version ZJDE0001.
3. CRM Contact (P90CA074)	Use this processing option to identify the version of CRM Contact Processing Options (P90CA074) that the system uses to create a contact from a lead. If left blank, the system uses version ZJDE0001.
4. Manage Opportunities (P90CB020)	Use this processing option to identify the version of Manage Opportunities (P90CB020) that the system uses to create an opportunities from a lead. If left blank, the system uses version ZJDE0001.
5. Import Leads (P90CB015)	Use this processing option to identify the version of Import Leads (P90CB015) that the system uses to retrieve information about all the features and options that are related to Import Leads. If left blank, the system uses version ZJDE0001.
6. CRM Customer Detail (P90CA080)	Use this processing option to identify the version of CRM Customer Detail (P90CA080) that the system uses to when displaying the customer information for a converted lead. If left blank, the system uses version ZJDE0001.
7. Item Catalog (P90CA106)	Use this processing option to identify the version of the Item Catalog program (P90CA106) that the system uses to when displaying the customer information for a converted lead. If left blank, the system uses version ZJDE0001.

Setting Processing Options for the Import Leads Program (P90CB015)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Versions

These processing options specify program versions that are used to process lead information.

**1. Work With Leads
Version (P90CB010)**

Use this processing option to specify the version of the CRM - Manage Leads program (P90CB010) that the system uses when importing leads. If left blank, the system uses version ZJDE0001.

Process

These processing options specify the manner in which lead information is processed.

1. Postal Code Editing

Use this processing option to specify whether postal code editing is activated. If you activate editing, the system verifies that the lead's postal code exists in the F0117 table. If the postal code exists in the table, and the lead's city, county, state, or country fields are left blank, the system populates these fields with the values from the F0117 that are associated with the lead's postal code. If the postal code does not exist in the F0117, the system produces a warning.

If you do not activate editing, the system does not verify postal codes, and no warnings are produced. Values are:

Blank or 0: Do not activate postal code editing.

1: Activate postal code editing.

Maintaining and Updating Leads

This section provides an overview of lead maintenance, lists prerequisites, and discusses how to:

- Qualify leads.
- Assign product interests to leads.
- Assign partners to leads.
- Add new activities to leads.
- Link action plans to leads.

Understanding Lead Maintenance

After you enter basic lead information into the system, you can update and maintain the information that the organization needs to successfully convert the lead to an account.

Classification Information

Each organization has information tracking needs that are specific to their business. Using category code fields, you can set up 30 fields that can be used to track information that is specific to the business.

When you enter a lead, you can click the Classification link, and then specify this information by entering values in the Category Code 01 through Category Code 30 fields. You can configure each of these fields to display a title that is appropriate for the type of information you are storing in the field. You can also set up values for each field.

For example, if you want to specify whether the lead has been given a particular piece of marketing material, you can configure one of the category code fields to track this. You can change the field description to read "Brochure A" and create values of *Y* and *N* to specify that the client has (*Y*) or has not (*N*) received the material.

See *EnterpriseOne Tools 8.94 PeopleBook: Foundation*

Address Information

Typically a lead will have multiple addresses, such as a bill to address and a ship to address. When you enter basic lead information, the system requires you to enter an address. You specify the type of address that is entered during basic lead entry using the processing options for the CRM - Manage Leads program. You can then click the Address link and enter additional addresses for the lead.

Lead Qualification

Before the sales representatives invest too much time and effort on a lead, they can qualify the lead to determine whether the lead is worth pursuing.

When you enter basic lead information, the system populates the Qualification field with the default qualification, as specified in the processing options. You can change the qualification at any time before the lead is converted.

When you click the Qualification link, the system displays the questions that were created for the selected qualification. The sales representative can ask the questions to the lead and enter the answers into the system. The system automatically scores the lead based on these answers. If the qualification score meets or exceeds the qualification goal, the lead is considered qualified.

Note. The qualification score is informational only. If a lead does not meet or exceed the qualification goal, a user can still convert the lead to a customer. Sales representatives should use qualification scores and goals to assist in making educated decisions about whether to continue pursuing the lead.

Product Interests

When you work with a lead, you identify the goods or services that the lead might be interested in purchasing. You can enter product interest information for each lead. Using the Product Interest link, you can attach product catalogs or product catalog categories to the lead. The sales representative can use this information to determine how to proceed with the sales cycle.

Partners

Many organizations work with outside companies, or partners, when trying to sell goods or services. To help track the partners are actively working on each lead, you can assign partners to the lead. The partner must exist in the system before you can attach it to a lead.

Note. You can enter a partner in the Lead Owner field. Typically, you enter a partner in this field only if the partner assumes the main responsibilities associated with the lead.

Activities and Action Plans

After you enter a lead into the system, you can attach activities to the lead. Activities are the tasks that can help a sales representative convert a lead into an account. You can create new activities for each lead, or you can attach an action plan to a lead.

An action plan is a predefined list of activity templates. Typically, the activity templates associated with an action plan are separated into the different sales cycle steps in which they should be performed. When you attach an action plan to a lead, the system creates activities for the lead based on the associated templates. The action plan assists the sales representative in managing and carrying out the appropriate activities for each lead, at the appropriate time.

Prerequisites

Before you complete the tasks in this section:

- Set up qualification scripts.
- Enter sales team members and partners into the system.
- Set up product catalogs and items.
- Create activities and action plans.
- Set up category code fields.

See Also

Chapter 3, “Setting Up Sales Fundamentals,” Setting Up Qualification Scripts, page 26

Chapter 4, “Managing the Sales Force,” page 35

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, “Using the Item Catalog Application”

PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook, “Setting Up Foundation Calendar”

EnterpriseOne Tools 8.94 PeopleBook: Foundation

Forms Used to Maintain and Update Leads

Form Name	Form ID	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead Management	Select an existing lead.
Lead - Manage <Lead Name>	W90CB010B	Select a lead on the Search for Leads form, and click Select.	Use this form to: • Enter and maintain lead information. • Enter attachments for leads.

Qualifying Leads

Access the Lead - Manage <Lead Name> form. Select the Lead tab. Click the Qualification link.

Lead - Lead - Manage Dempsy, John

Lead Partner Activities Attachments

[Detail](#) | [Classification](#) | [Address](#) | **Qualification** | [Product Interest](#)

Save Changes Undo Changes Close

Find

Records 1 - 2

	Question	Answer Id	Answer
☒	What is the estimated budget for hardware?	11	Greater than \$10,000
☐	What is the approved budget for 2004 Technology?	0	

Lead - Manage <Lead Name> form: Lead tab: Qualification link

Click the Find button to view all of the questions that are associated with the specified qualification. After you have asked and answered all questions, click the Save Changes button. The system automatically calculates the qualification score and populates the Qualification Score field.

Comment

Enter any additional information, other than the specific answer ID, that the lead provides when answering the specified question.

For example, a sales representative might ask the question, "Are you in the market to buy widgets?" The lead answers, "Maybe, if the price was right." To capture all of the relevant information, you select the *Maybe* answer in the Answer ID field, and then enter *Lead is likely to purchase widgets if the price is within their budget* in the Comment field.

Assigning Product Interests to Leads

Access the Lead - Manage <Lead Name> form. Select the Lead tab. Click the Product Interest link.

To assign product interests to a lead:

1. Click the Assign Product Interests button.
2. On the Select from Catalog form, you can expand or collapse the catalog hierarchy to display relevant product information.

When you select a row in the Catalog section of the form, the catalogs that are associated with the catalog category are displayed in the grid on the right side of the form.

3. Select each catalog or catalog category that you want to assign to the lead record, and then click OK.
Alternatively, click the Advanced Catalog Search link, select the catalogs that you want to assign to the lead, and then click Select.
4. The system returns you to the Product Interest grid, and displays the selected catalogs in the detail area.
5. Click the Save Changes button to add the product to the lead, or click the Undo Changes button to remove the product interest.

6. To remove a product from the lead after it has been added and saved, select the product and then click the Remove button.

Assigning Partners to Leads

Access the Lead - Manage <Lead Name> form. Select the Partner tab.

To assign partners to a lead:

1. Click the Assign Partners button.
2. On the Link Partner form, select all of the partners that you want to assign to the lead, and then click Select.
The system returns you to the Partner tab and displays the selected partners in the detail area of the form.
3. To remove a partner from the lead, select the partner and then click the Remove button.

Adding New Activities to Leads

Access the Lead - Manage <Lead Name> form. Select the Activities tab. Click the Activities link.

To add a new activity to a lead:

1. Click the Add button.
2. On the Add Activity form, complete the steps to create a valid activity, and then click the Save and Close button.
3. The system returns you to the Activities tab and displays the new activity in the detail area of the form.

Linking Action Plans to Leads

Access the Lead - Manage <Lead Name> form. Select the Activities tab. Click the Activities link.

To link an action plan to a lead:

1. Click the Link Action Plan button.
2. On the Action Plan Search and Select form, select the action plan that you want to associate with the lead, and then click Select.
3. The system returns you to the Activities tab and displays the newly-created activities in the detail area of the form.

The activities that the system creates for the lead are based on the activity templates that are associated with the selected action plan.

Converting Leads

This section provides an overview of the lead conversion process and discusses how to:

- Convert leads to opportunities.
- Locate the new customer record.
- Locate the new contact record.
- Locate the new opportunity record.

Understanding the Lead Conversion Process

If it appears as though the sales lead is qualified, and is interested in making a purchase, you can convert the lead to an opportunity. Opportunity records allow you to track more detailed information about potential sales. To convert a lead to an opportunity, you click the Convert Lead button on the Lead - Manage <Lead Name> form. After you convert the lead, the system changes the lead's status to converted, and then disables all of the fields and options on the lead record. The system then creates these records:

- Customer Record

The system uses the value in the Company Name field to create a customer record in the F90CA080 table.

If a customer record already exists with the same company name, the system compares the city and postal code information from the existing customer record to the lead record. If the city and postal code also match, the system displays the Duplicate Customer form to notify you that a customer record already exists for this company. You can choose to add a new customer record or use the existing customer record.

- Contact Record

The system uses the values in the First Name and Last Name fields to create a contact record in the F90CA070 table.

If an existing customer was selected, and if a contact record already exists with the same first and last name, the system displays the Duplicate Contact form to notify you that a contact record already exists for this person. You can choose to add a new contact record or use the existing contact record.

If the system creates a new customer record, the system also creates a new contact record, regardless of whether a contact record already exists for that person.

- Opportunity Record

The system creates an opportunity record in the F90CB020 table using the newly created contact and customer records. After the lead is converted you can then enter additional information into the opportunity, such as item and quantity information.

Depending upon the data that is included in the lead record, these tables might also be updated when a lead is converted:

- F01161
- F01161Z1
- F0115
- F01151
- F011901
- F90CB02I
- F90CB02J
- F90CB02C
- F90CB02E
- F90CB043
- F90CB042
- F90CB05B
- F01301
- F90CA61E

After conversion, you cannot change the lead record. To make changes to any information associated with the lead, you must access the newly created customer, contact, or opportunity records.

Forms Used to Convert Leads

Form Name	Form ID	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead Management	Select an existing lead.
Lead - Manage <Lead Name>	W90CB010B	Select a lead on the Search for Leads form, and click Select.	Convert a lead or access the converted customer record.
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer Management	Review the converted customer record.
Search for Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact Management	Review the converted contact record.
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity Management	Review the converted opportunity record.

Converting Leads to Opportunities

Access the Lead - Manage <Lead Name> Form. Select the Lead tab. Click the Detail link.

To convert a lead to an account:

1. Click the Convert Lead button.

The system changes the lead status to converted, disables all of the fields and functions on the Lead - Manage <Lead Name> form, and all related tabs, and creates new customer, contact, and opportunity records.

2. Click the Close button to exit the form.

On the Search for Leads form, you can verify that the lead was converted by reviewing the Status field and verifying that the system changed the value to *CON* (converted).

Locating the New Customer Record

Access the Search for Customers form.

Alternatively, you can click the Converted Customer link on the Lead - Manage <Customer Name> form to access the converted customer record after you convert the lead. The link appears next to the Company field.

Name Enter the name of the company that was associated with the converted lead in the Name field to locate the newly created customer record.

Customer Number Review and note the value in this field. The system automatically generates this customer number when a lead is converted. You can use this customer number when searching for opportunities, quotes, sales orders, or contact records that are associated with this customer.

Locating the New Contact Record

Access the Search for Contacts form.

Contact Name Enter the name of the lead contact in this field to verify that the system created the appropriate contact record during lead conversion. The contact record is created using the First Name and Last Name fields from the lead.

For example, if the value in the First Name field of the lead record was *John* and the value in the Last Name field of the lead record was *Franks*, enter *John Franks* in the Contact Name field, and then click Find to verify that a contact record was created when the lead was converted.

Address Number Enter the customer number that was created when the lead was converted to an account. The system automatically creates a contact record for the converted lead and enters the newly created customer number in this field.

Address Name Enter the name of the company that was associated with the converted lead in the Address Name field to locate the newly created contact record.

Locating the New Opportunity Record

Access the Search for Opportunities form.

Sold To Customer Enter the customer number that was created when the lead was converted to an account. The system automatically creates an opportunity record for the converted lead and enters the newly created customer number in this field.

CHAPTER 6

Managing Sales Opportunities

This chapter provides an overview of sales opportunities and discusses how to:

- Enter opportunities.
- Manage and maintain opportunities.
- Create quotes and sales orders for opportunities.

Understanding Sales Opportunities

Opportunities represent potential revenue to a sales organization. They are the leads that have been qualified and have progressed to a point where there is a higher probability of closing a sale. You can enter opportunities manually or allow the system to create opportunities when converting leads.

You access opportunity forms and programs using the Manage Opportunities program (P90CB020); however, the system uses all of these programs to process opportunity information:

- Opportunity - Sales Methodology Search & Select Program (P90CB021).
- Opportunity_Qualification Search and Select Program (P90CB022).
- Opportunity - Sales Cycle Search & Select Program (P90CB023).
- Opportunity Reusable Subforms Program (P90CB024).
- Opportunity Search and Select Program (P90CB025).
- Opportunity Sales Team Program (P90CB026).
- Opportunity Sales Driver Program (P90CB027).
- Opportunity Cost Program (P90CB029).
- Opportunity Influencer Program (P90CB030).
- Opportunity Activity Program (P90CAEXT).

Depending upon the type of information that you include on the opportunity, records are created in these tables:

- F90CB020
- F90CB02C
- F90CB02D
- F90CB02E
- F90CB02I
- F90CB02J

- F90CB02M
- F90CB05B
- F90CA61E

After you enter the opportunity, you can then attempt to qualify it to determine whether the organization should pursue the opportunity further into the sales cycle. If the opportunity is qualified, members of the sales team can continue through the sales cycle in hopes of converting the opportunity into a sale.

To manage and maintain the opportunity effectively, you must provide as much information as possible to each member of the sales team. You can enter and update information for each opportunity, such as:

- The products and quantities that the customer is interested in.
- The factors that drive the customer's decision to purchase goods or services from the organization.
- Who the influential people are that make decisions regarding the opportunity.
- The costs that the sales team incurs when working with the opportunity.
- The activities that should be completed to successfully convert the opportunity to a sale.
- The members of the sales team who are actively working on the opportunity.

If a sales team is able to manage the opportunity successfully, and continue further along into the sales cycle, the opportunity contact might want to receive a formal quote for the goods or services in which they are interested. You can create a quote directly from the Manage Opportunities program. Sales quotes are managed and processed in the PeopleSoft EnterpriseOne Sales Order Management system.

Lastly, you can convert the opportunity into a sales order. You can create the sales order from the Manage Opportunities program, however, you use the PeopleSoft EnterpriseOne Sales Order Management system to manage and process the sales order information.

See Also

Chapter 5, "Managing Sales Leads," Converting Leads, page 60

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook

Entering Opportunities

This section provides an overview of opportunity entry and discusses how to:

- Enter basic opportunity information.
- Set processing options for the Manage Opportunities program (P90CB020).

Understanding Opportunity Entry

When you enter an opportunity, you enter basic information about the contact, the company, and the industry associated with the opportunity. If the system created the opportunity during lead conversion, much of this information is automatically entered in the opportunity record. However, you should review the record and enter any additional information as necessary.

The information that you enter for the opportunity is used to provide the sales team with all of the information that they need to successfully convert the opportunity to a sale. You can also use this information to track successes, failures, and trends in sales and marketing strategies and processes. For example, you can enter the source of each opportunity. You can then use this information to determine which marketing or advertising campaigns and events have led to the most opportunities.

You can also enter a monetary amount in the Budget field. This field can be used to store:

- The amount of money available to the sales team when working on this opportunity.
- The amount of money that the customer has budgeted for this sale.

You decide how to use this field, depending upon the needs of the organization.

As the sales team works with the opportunity, they enter the costs that they incur. You can produce these reports to determine whether a sales team is within its budget for a specified opportunity:

- Opportunities by Channels for a Sales Rep Report (R90CB020E).
- Opportunity Summary Report (R90CB020I).

Additionally, you can enter information about the sales methodology that the sales team should use when working on the specified opportunity. Sales methodologies are used to assist sales representatives in carrying out all of the necessary steps to successfully sell certain types of goods or services. After you enter a sales methodology on an opportunity, you then specify the current sales cycle step on which the sales team is working. The system uses the probability associated with the sales cycle step, along with any monetary value associated with the opportunity to determine the amount of potential revenue to enter into the sales pipeline. This information is used for revenue projections.

Before you can enter opportunities or create opportunities during lead conversion you must set the processing options for the Manage Opportunities program (P90CB020).

Credit Check

After you have determined that the opportunity is qualified, you can click the Credit Check button to check the customer's credit. The system automatically populates these fields on the opportunity using data that is stored in the F03012 table for the sold to customer:

- Credit Message

The system uses the value in the Line of Business field to retrieve the credit message. This field is read-only. The system displays a message to notify the user of the customer's credit status.

If the customer is exempt, the system displays "Credit check passed. Exempt from credit check." If there is no credit limit specified, the system displays "Credit check passed. No credit limit specified." If the customer has a credit limit that has not been exceeded, the system displays "Credit check passed. Credit limit not exceeded." If the limit has been exceeded, the system displays "Credit check failed. Credit limit has been exceeded."

- Limit
- Exposure
- Available

Note. If you have not set up credit information for this customer in the PeopleSoft EnterpriseOne Accounts Receivable system, the system does not populate these fields when you click the Check Credit button. Also, the values in the credit fields are informational and do not restrict the amount that you can enter in the Potential Amount field, or the total of the line items that you can enter for the opportunity.

If you do not want sales representatives to check credit information, or if you are not tracking credit information for customers, you can disable the Check Credit button by setting a processing option for the Manage Opportunities program (P90CB020).

Lastly, if the user is disconnected from the network, the system displays only the credit limit. The system does not populate the Exposure and Available fields.

See Also

PeopleSoft EnterpriseOne Accounts Receivable 8.11 PeopleBook, “Setting Up Customer Master Information”

Forms Used to Enter Opportunities

Form Name	Form ID	Navigation	Usage
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity Management	Select existing opportunities, or access forms to add new opportunities.
Add Opportunity	W90CB020C	Click Add on the Search for Opportunities form.	Enter basic opportunity information.

Entering Basic Opportunity Information

Access the Add Opportunity form.

Opportunity - Add Opportunity					
Save and Close Save and Continue Save and Add New Cancel					
Description	ABC Inc Opportunity		Number		
Opportunity Type	Direct		Source	CAC California Conference	
Partner			Contact	-- Select One --	
Sold To	333462	ABC Inc.	Contact	John Franks	
Line Of Business	00000 PeopleSoft E1				
Credit Message					
Credit Check	Limit		Exposure		Available
Ship To	333462	ABC Inc.	Contact	John Franks	
Qualification Name	Bike Sales Qualification		Goal	20	Score 0
Sales Methodology	Bike Sales		Probability	0	
Sales Cycle	Revised Proposal		Close Date	29/10/04	
Currency Code	USD U.S. Dollar				
Potential Amount	50000.00				
Budget Amount	50000.00				
Line Item Total	0.00				
Lost To			Lost Reason	-- Select One --	
Save and Close Save and Continue Save and Add New Cancel					

Add Opportunity form

After you enter basic opportunity information, you can click the Save and Close button to exit the program. You can click the Save and Add New button to enter basic information for another opportunity, or you can click the Save and Continue button to continue working with the opportunity record. If you choose to continue working with the opportunity record, proceed to the Managing and Maintaining Opportunities section of this chapter for additional information.

Opportunity Type

Enter the type of opportunity you are entering. Values are stored in UDC 90CB/TC and might include types such as:

DIR: Direct

REF: Referral

PAR: Partner

Source

Enter the manner in which the opportunity was obtained. Values for source are stored in UDC 90CB/LS. You can enter generalized codes or specific codes to track the success of particular marketing campaigns and events. For example, you might set up general codes such as Referral, Advertising, and Event.

To track the success of particular advertising or marketing events, you can enter each advertising campaign or marketing event in the UDC table, such as New York Expo, California Tech Show, or Daily News Ad.

Contact (Partner)	Select the partner contact from the available options. When you enter a partner's address book number in the Partner field, the system makes the contacts associated with that partner available for selection. You can select one partner contact.
Contact (Sold To)	Select the sold to contact from the available options. When you enter a customer number in the Sold To field, the system makes the contacts associated with that customer number available for selection. You can select one sold to contact.
Line of Business	Review the value in this field to determine the company with which the opportunity is associated. If Line of Business is selected on in the Accounts Receivable Constants form, the system uses the branch to retrieve the default line of business company. If Line of Business is not selected, the system uses the default value of 00000. If Line of Business is selected and the company is set up in the F03012 table, the company is used. If the company is not set up, the system uses the default value of 00000.
Contact (Ship To)	Select the ship to contact from the available options. When you enter a customer number in the Ship To field, the system makes the contacts associated with that customer number available in this field. You can select one ship to contact.
Qualification Name	Enter the name of the qualification script that should be used to qualify the opportunity. If you leave this field blank, the system enters the default qualification that is specified in the processing options of the Manage Opportunities program (P90CAB020).
Goal	Review the value in this field to determine the score that the opportunity needs to meet or exceed to be considered qualified. The system populates this field with the value that was entered when the associated qualification script was created.
Score	Review this field after you attempt to qualify an opportunity to determine whether the score meets or exceeds the qualification goal. If the value in this field is greater than or equal to the value in the Goal field, the opportunity is qualified.
Sales Methodology	Enter the sales methodology that should be used by sales representatives who are working on the opportunity. When you enter a new opportunity, this field is populated using the value that you enter in the processing options. If you leave this option blank, the system populates the sales methodology field with the default methodology. You can change the methodology if necessary.
Sales Cycle	Select the current sales cycle step that is associated with the opportunity from the available options. The available options include the sales cycle steps that are associated with the methodology that you enter in the Sales Methodology field. When you add a new opportunity, the system enters the first sales cycle step for the default sales methodology. You can change this value if necessary. Each time the sales cycle step changes, the sales team members associated with the opportunity are notified of the change using email. You specify, in the CRM constants, whether the notification is sent to the internal employee work center or to an external email address.

Probability	Review the value in this field to determine the probability of converting the opportunity to a sale. The system populates this field with the probability that is associated with the current sales cycle step. The probability is used in several ways. First, the probability must be greater than zero (0) to convert the opportunity to a quote, it must be 100 percent to convert the opportunity to a sales order, and it must be zero (0) in order to enter a value in the Lost To field. Additionally, the probability is used in calculating the amount of potential revenue that is entered into the sales pipeline for the opportunity.
Close Date	Review, and if necessary, update the date in this field. This date represents the date by which the opportunity should be closed or finished. The system calculates the close date and populates this field. The date is determined by adding to the system date the months-to-close value that is associated with the current sales cycle step. You can change this date if necessary.
Potential Amount	Enter the monetary value that could potentially be realized by the organization if the opportunity is converted to a sale. If the Line Item Total field is blank, this value is used to determine the amount of revenue when creating sales forecasts, and also to determine the number of gold bars to display for the related customer. However, if there is a value in the Line Item Total field, that value is used to determine the amount of revenue included in a sales forecast and gold bar display. Additionally, you can set the processing options for the Manage Forecasts program (P90CB060) to use the value in this field or the value in the Line Item Total field when calculating revenue.
Budget Amount	Enter either the amount of money that the client has budgeted for this sale, or the monetary amount that is available for the sales team to use when pursuing the opportunity. This value is informational only and can be used by the sales team when setting item prices for the customer, or it can be compared against the costs associated with the opportunity to determine whether the sales team is over or under budget.
Line Item Total	Review the monetary amount that is associated with total number of goods or services entered in the detail area of the form. This field is read-only and is updated each time a line in the detail area is added, changed, or deleted. This value can be used to determine the revenue amount associated with sales forecasts, as well as the number of gold bars that are displayed for the associated customer. If this field is blank, the system uses the value in the Potential Amount field to determine the gold bar display.
Lost To	Enter the competitor that the customer chose to purchase goods and services from. This field is enabled only when a sales cycle with a probability of zero (0) is entered on the opportunity record.
Lost Reason	Enter the reason that the opportunity was not converted to a sale. Four lost reason codes are supplied for you; however, you can add additional codes if necessary. Values are stored in UDC 90CB/LR, and include: <i>CMPT</i>: Competitor Undercut. <i>LOSFB</i>: Loss of Funding/Budget. <i>OVPRC</i>: Pricing too high. <i>PDNMN</i>: Product does not meet needs.

Setting Processing Options for the Manage Opportunities Program (P90CB020)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Display

These processing options specify which tabs are displayed when processing opportunity information.

- 1. Display Influencer Tab** Use this processing option to specify whether the Influencer tab appears on the Opportunity - Manage <Customer Name> form. Values are:
Blank: Yes, display the tab.
1: No, do not display the tab.
- 2. Display Attachments Tab** Use this processing option to specify whether the Attachments tab appears on the Opportunity - Manage <Customer Name> form. Values are:
Blank: Yes, display the tab.
1: No, do not display the tab.

Default

These processing options specify the default values to use when processing opportunity information.

- 1. Default Opportunity Branch Plant** Use this processing option to specify the default branch plant that is associated with the opportunity. This value is used to determine product pricing for the opportunity and line of business company.
- 2. Default Opportunity Type Code** Use this processing option to specify the default opportunity type that is used when entering an opportunity record.
- 3. Sales Methodology ID** Use this processing option to specify the default sales methodology that is used when entering an opportunity record. If you leave this option blank, the system populates the sales methodology field using the methodology that has been set as the default.
- 4. Branch/Plant** Use this processing option to specify how the system selects the default branch/plant for tracking costs. Enter a value in this option only if processing option 1 is blank.

You can set up header branch/plant defaults based on the user ID or terminal, or based on the business unit for the ship to address in Address Book Revisions (P0101). Values are:

Blank: The system uses the default location based on the user ID or terminal ID and displays the branch/plant in the order header form. You set up the

default branch/plant based on the user or terminal ID in Default Location and Printers (P400951).

1: The system uses the business unit that you specify on the Address Book Revisions form for the customer to which you are shipping the goods (ship to).

2: The system uses the business unit that you specify on the Address Book Revisions form for the customer to which you are selling the goods (sold to).

5. Sales Team Employee Search Type

Use this processing option to specify the default search type to use when assigning sales team members to the opportunity record. Values are stored in UDC 01/ST.

Process

These processing options specify the processes that can be performed when working with opportunity information.

1. Opportunity editable

Use this processing option to specify whether existing opportunities can be edited when inquired upon. Values are:

Blank: Allow users to edit existing opportunities.

1: Do not allow users to edit existing opportunities.

2. Allow Credit Check

Use this processing option to specify whether users can perform a credit check on the sold to customer associated with an opportunity. If the credit check is allowed, the Check Credit button is enabled. Values are:

Blank: Allow credit check.

1: Do not allow credit check.

3. Allow Convert to Sales Order

Use this processing option to specify whether users can convert an opportunity to a sales order. If conversion is allowed, the Convert to Sales Order button is enabled. Values are:

Blank: Allow conversion to sales order.

1: Do not allow conversion to sales order.

4. Allow Convert to Quote

Use this processing option to specify whether users can convert an opportunity to a quote. If conversion is allowed, the Convert to Quote button is enabled. Values are:

Blank: Allow conversion to quote.

1: Do not allow conversion to quote.

Versions

These processing options specify the versions of related programs that the system uses when processing opportunity information.

1. Quote Order Entry (P42101)

Use this processing option to specify the version of the Quote Order Entry program (P42101) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0003.

2. Sales Order Entry (P42101)

Use this processing option to specify the version of the Sales Order Entry program (P42101) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

3. Work With Activities (P01301)	Use this processing option to specify the version of the Work With Activities program (P01301) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.
4. Competitor Find Browse (P6917901)	Use this processing option to specify the version of the Competitor Find Browse program (P6917901) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.
5. Item Catalog (P90CA106)	Use this processing option to specify the version of the Item Catalog program (P90CA106) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.
6. Manage Partner (P90CA050)	Use this processing option to specify the version of the Manage Partner program (P90CA050) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.
7. Contact Revisions (P90CA070)	Use this processing option to specify the version of the Contact Revisions program (P90CA070) that the system uses when processing opportunities. If left blank, the system uses version ZJDE0001.

Managing and Maintaining Opportunities

This section provides an overview of opportunity maintenance and discusses how to:

- Qualify opportunities.
- Add products to opportunities.
- Updating sales drivers on opportunities.
- Add new sales drivers to opportunities.
- Add influencers to opportunities.
- Add costs to opportunities.
- Add new activities to opportunities.
- Attach action plans to opportunities.
- Assign sales team members to opportunities.
- Update sales team information.

Understanding Opportunity Maintenance

To successfully manage the sales cycle, you must provide sales representatives with an easy to use method of maintaining and reviewing information that is critical to their sales opportunities. After you enter basic opportunity information, you can add all of the additional information that is necessary to effectively and efficiently manage sales opportunities.

Qualification

After you enter an opportunity, the next step is to qualify the opportunity. When you qualify an opportunity, you determine whether it makes sense for the organization to pursue the opportunity. Using qualification scripts, sales representatives can ask product- or service-related questions to the contact person who is associated with the customer's opportunity. The sales representative enters the answers into the system, and the system calculates the opportunity's qualification score.

If the score meets or exceeds the qualification goal, the opportunity is considered qualified and should be pursued. After you qualify the opportunity, the sales team continues to work through the sales cycle with the hopes of converting the opportunity to a sale.

Note. The qualification score is an informational tool that should be used to assist sales representatives in determining whether to pursue an opportunity. If an opportunity's qualification score is less than the qualification goal, the system does not prohibit the creation of quotes or sales orders associated with the opportunity.

Product Information

You can add products to an opportunity so that each sales representative that views the opportunity is aware of the products that the potential customer is interested in and the quantity that they might want to purchase.

When you add a product to an opportunity, you can enter the quantity for each product. The system uses the information that you entered when you created the product item, calculates the amount of the potential sale, and populates the Line Item Total field on the Opportunity - Manage <Opportunity Name> form.

You can enter specific items on an opportunity or the catalog that contains items in which the customer is interested. If you enter a catalog, you must enter at least one individual item before the opportunity is converted to a sales order. If the item has a base price associated with it, the system populates the price field on the opportunity. For the system to populate the price field, the prices must be set up in the F4106 table. However, you can override the price for items if necessary.

Additionally, you can enter miscellaneous items on the opportunity that have not yet been created in the Item Master. To enter an item that does not have an Item Master record, leave the Item Number field blank, and enter *M* in the Line Type field. You can also enter a request date for the items.

Depending upon how you set the processing options for the Manage Forecasts program (P90CB060), the system uses the amount in the Line Item Total field or the Potential Amount field to calculate revenue in sales forecasts.

The system uses the potential amount to calculate the pipeline amount that is associated with the opportunity. The values in the Line Item Total or Potential Amount fields are also used to determine the number of gold bars that the system displays for the associated customer account.

Lastly, you can enter configured items into the sales opportunity. However, the items are not configured until the opportunity is converted to a quote.

See [Chapter 7, "Managing Sales Data," Forecasting Sales Revenue, page 97](#).

See *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, "Managing Item Information".

See *PeopleSoft EnterpriseOne Configurator 8.11 PeopleBook*, "Working with Configured Items".

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, "Setting Up Base and Standard Pricing".

Sales Drivers and Influencers

To successfully sell products and services, it is critical that sales representatives know who the key players are in a deal, and that they understand their key concerns. For each opportunity record, you can enter the influencers, or key players. You can include information about each influencer, such as their perspective on the sale/purchase, and the role they hold within their organization. For example, you can enter information to specify that one influencer is an enthusiastic executive, and another influencer is a pessimistic financial employee. Sales representatives can use this information to determine how to effectively sell to the customer.

You can also enter sales drivers for each opportunity. Sales drivers are the key factors that a potential client is looking at to determine whether to purchase goods or services. When you enter a sales driver, you can also assign it an importance level, which helps the sales representatives understand which items are most important to the customer, and therefore, are important to the sale.

For example, influencers might specify that price, availability, and customer service are their three main areas of concern when purchasing products from an organization. These are the sales drivers. To ensure that each sales representative that works on the opportunity is aware of these factors, you can add each of the drivers to the opportunity and rank them in order of importance.

Before you can add an influencer to an opportunity record, you must create a contact record for that person.

See *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, “Managing Contacts”.

You can also attach competitors to an opportunity. Attaching competitors enables the sales team to determine who they are competing against.

Note. You can use the processing options for the Manage Opportunities program to specify whether the system displays the Influencer link on the opportunity record. Therefore, if the link does not appear on the Opportunity - Manage <Company Name> Opportunity form, the processing option has been set to hide the link. You can change this processing option at any time.

Track Costs

To determine whether the organization actually makes money on a sale, you must be able to track the costs associated with closing the sale. You can set up cost types, and enter each cost that is directly related to each opportunity. If you choose to use the Budgeted Amount field to track costs associated with sales opportunities, you can then run reports to determine whether opportunities are over budget.

When you enter a cost, you must associate it with a company or contact person for the opportunity. Therefore, you must first verify that a Who's Who record exists for the entity for whom the expense was incurred before entering the cost into the system.

Tracking the costs associated with each opportunity can help you:

- Analyze spending trends.
- Create sales budgets.

See *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, “Managing Contacts”.

Activities and Action Plans

Typically, an organization researches the sales cycle for their products and services and develops sales strategies that representatives can use to help them close sales. Many times, sales strategies include predefined activities that sales representatives can carry out to assist with a sale.

You can create new activities, search on existing activities associated with the opportunity, or delete activities associated with the opportunity. You can also link action plans to the activity. An action plan is a list of activity templates. When you link an action plan to an opportunity, the system creates new activities for the opportunity based on the activity templates associated with the action plan. If you have attached an action plan to the sales cycle that is associated with the opportunity, the activities associated with that action plan are automatically added to the opportunity record. For example, you might have sales representatives attach an action plan that includes these activities to all opportunities associated with widget sales:

- Activity 1 - Qualify opportunity.
- Activity 2 - Send marketing material to customer.
- Activity 3 - Follow up call to customer to schedule demonstration.
- Activity 4 - Generate proposal documents.

After you have attached activities to an opportunity, sales representatives can view the activities in their calendars. Each activity appears on the calendar. You can use this calendar to verify that activities are scheduled properly.

See *PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, “Setting Up Foundation Calendar”.

The Opportunity Sales Team

When you create an opportunity, the system copies the sales team from the associated customer record to the opportunity record. The system uses the CRM Constants to determine whether to copy the sales team from the sold to customer, the ship to customer, or both. For example, the opportunity might have one customer in the Sold To field and another in the Ship To field. If the CRM Constants are set to Ship To, the system copies all of the active sales team members from the ship to customer’s sales team into the opportunity record. After a sales team member has been added to an opportunity record, the system does not make any automated changes to the team, even if the sales team of the associated customer changes.

You can review the sales team for the opportunity, and make manual changes as necessary. You can add additional sales team members to the opportunity and define sales team roles at the opportunity level as well.

You can also enter commission information for each sales team member. You can select the Apply Commissions option for each sales representative on the sales team that should receive commissions. This option is enabled only if commission information for the sales team member exists in the F42140 table.

You can also specify the revenue percentage that each member of the sales team should receive if the opportunity is converted to a sale. The total of the revenue percentages entered for the sales team cannot exceed 100 percent. For example, if three members of a sales team should receive commissions, you must determine the percentage, out of 100, that each sales team member should receive credit for. This example illustrates how you might assign percentages:

- Sales Rep 1 (owner): 40 percent.
- Sales Rep 2: 30 percent.
- Sales Rep 3: 30 percent.

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, “Setting Up the System for Sales Order Management,” Setting Up Commission Information.

Cycle Step History

Typically, as the sales team progresses with a sales opportunity, they move from one sales cycle step to the next. Each time the sales cycle step changes on an opportunity, a record is created on the Cycle Step tab. Additionally, each time the sales cycle step changes, the sales team members associated with the opportunity are notified of the change using email. You specify, in the CRM constants, whether the notification is sent to the internal employee work center or to an external email address.

See [Appendix A, “Delivered Workflow for PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications,” page 129](#).

When you create sales cycle steps, you enter the expected amount of time it should take to close the sale. You can review the information on the Cycle Step tab to determine whether sales opportunities are being closed in the appropriate amount of time. You might also find, by reviewing this information, that the time estimates need to be adjusted. For example, if the majority of the sales opportunities are taking longer to close than the sales cycle step allows, it might be necessary to increase the amount of time associated with the cycle step.

Attachments

You can add multiple attachments to an opportunity record. For example, if you create a proposal for the opportunity, you can attach it to the opportunity to track the information that has been sent to that customer.

Note. You can use the processing options for the Manage Opportunities program to specify whether the system displays the Attachments tab on the opportunity record. Therefore, if the tab does not appear on the Opportunity - Manage <Company Name> Opportunity form, the processing option has been set to hide the tab. You can change this processing option at any time.

Forms Used to Maintain Opportunities

Form Name	Form ID	Navigation	Usage
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity Management	Select existing opportunities, or access forms to add new opportunities.
Opportunity - Manage <Customer Name> Opportunity	W90CB020A	Select a record on the Search for Opportunities form.	Manage and maintain opportunities.
Add Sale Driver	W90CB027D	Select the Opportunity tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Sale Driver link and then click Add.	Add new sales drivers to an opportunity
Add Influencer	W90CB030A	Select the Opportunity tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Influencer link and then click Add.	Add an influencer to an opportunity.

Page Name	Object Name	Navigation	Usage
Add Opportunity Cost	W90CB029A	Select the Opportunity tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Cost link and then click Add.	Add costs to an opportunity.
Assign Competitor	W90CA06CF	Select the Opportunity tab on Opportunity - Manage <Customer Name> Opportunity form. Click the Competitor link and then click Assign Competitor.	Add a Competitor to an opportunity.
Add Activity	W01301B	Select the Activities tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Activities link and then click Add.	Add new activities to an opportunity.
Action Plan Search & Select	W01401A	Select the Activities tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Activities link and then click Link Action Plan.	Link an action plan to an opportunity.
Edit Sales Team	W90CB026B	Select the Sales tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Sales Team link and select a member of the team.	Update sales team information.
Assign Sales Team	W90CA041A	Select the Sales tab on the Opportunity - Manage <Customer Name> Opportunity form. Click the Sales Team link and then click Assign Sales Team.	Add sales people to the sales team.

Qualifying Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Opportunity tab. Click the Qualification link.

Click the Find button to view all of the questions that are associated with the specified qualification. After you have asked and answered all questions, click the Save Changes button. The system automatically calculates the qualification score and populates the Qualification Score field on the Opportunity - Manage <Customer Name> Opportunity form.

Comment

Enter any additional information, other than the specific answer ID, that the opportunity contact provides when answering the specified question.

For example, a sales representative might ask the question, "Are you in the market to buy widgets?" The contact answers, "Maybe, if the price was right." To capture all of the relevant information, you select the *Maybe* answer in

the Answer ID field, and then enter *She is likely to purchase widgets if the price is within their budget.* in the Comment field.

Adding Products to Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Opportunity tab. Click the Detail link.

The screenshot shows a web form titled "Records 1 - 4" with a table of product items. Below the table are buttons for "Delete", "Save Changes", "Undo Changes", "Convert to Quote", "Convert to Sales Order", and "Close".

	Quantity	UOM	Product Catalog	Item Number	Item Description	Line Type	Unit Price	Extended Price
☐	5000	EA		2206	Piston	S	0.9500	4,750.0
☐	6500	EA		2202	O-Ring	S	1.2900	8,385.0
☐	5000	EA		2209	Bracket, Top	S	2.1900	10,950.0
☒	0						0.0000	

Opportunity - Manage <Opportunity Name> form: Opportunity tab: Detail link, product section

Line Item Total

Review the amount in this field to determine the total value of the products or services that are entered in the detail area of the form. The system calculates the extended price for each item, and populates this field with the sum of the extended price column.

Unit Price

Review, and if necessary, update the value in this field. This value represents the base price to be charged for one unit of this item. In the Sales Order Management system all prices must be set up in the F4106 table.

The system multiplies this value by the quantity to determine the extended price for the item.

Updating Sales Drivers on Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Opportunity tab. Click the Sale Driver link.

Opportunity - Opportunity - Manage ABC Inc. Opportunity

Opportunity | Activities | Sales | Attachments

[Detail](#) | [Qualification](#) | **Sale Driver** | [Cost](#) | [Influencer](#) | [Competitor](#) | [Cycle Step](#)

Close

Find | Select | Add

Records 1 - 1

	Short Description	Category	Origin	Importance	Sale Driver
	Budget Concerns	BUDG	User Generated	1	

Opportunity - Manage <Opportunity Name> form: Opportunity tab: Sale Driver link

To update an existing sales driver on an opportunity:

1. Click the Find button.
The system displays a list of the sales drivers that are associated with the sales methodology that was selected when the opportunity was created. If no sales drivers appear, no sales drivers were created for the associated sales methodology.
2. Select a sales driver and then click the Select button.
3. If necessary, click the link in the Short Description field to update information associated with the sales driver.
4. When you have added all of the relevant sales drivers to the opportunity, click the Close button.

Adding New Sales Drivers to Opportunities

Access the Add Sale Driver form.

Add Sale Driver

OK Cancel Tools

Origin: User Generated

Category: CPET

Description: Best bikes on the market?

Importance: 2

Long Description: Client wants to be sure they are buying the best bikes on the market.

User Response:

Add Sale Driver form

- Origin** Review the value in this field to determine where the sales driver originated. When you add a new sales driver to an opportunity the system enters *User Generated* in this field. If a default sales driver was populated from the sales methodology, the system enters *System Generated* in this field.
- Category** Enter the type of sales driver that you are creating. Examples of sales drivers include budget concerns, inventory concerns, or revenue generation. Values are stored in UDC 90CB/CA.
- Importance** Enter the numeric value that corresponds to the importance of the sales driver. Enter a 1 for the most important sales drivers. Values are stored in UDC 90CB/IM.
- User Response** Enter additional information regarding this sales driver. This field is used to store information that the opportunity contact provides to the sales representative.

Adding Influencers to Opportunities

Access the Add Influencer form.

Contact	Enter the name of the contact person that is an influencer on the current opportunity. To add an influencer to the opportunity a contact record must already exist for the person.
Sponsorship Level	Select the value that best describes how the influencer endorses the deal. For example, is this influencer an advocate, an opponent, enthusiastic, or pessimistic about the deal? Values are stored in UDC 90CB/SL.
Sponsorship Type	Select the value that best describes the role that the influencer holds with the account. For example, the influencer might be an executive or a financial employee with the associated account. Values are stored in UDC 90CB/SP.

Adding Costs to Opportunities

Access the Add Opportunity Cost form.

Add Opportunity Cost

OK Cancel Tools

Cost For Allamo, Yasmine

Cost Type Expense

Cost Category Food

Date Cost 15/06/05

Payment Method Corporate Card

Amount 153.35 USD

Short Description Dinner with ABC Inc

Long Description Took J. Franks and S. Smith to dinner to discuss sale.

Add Opportunity Cost form

Cost For	Enter the name of the contact person for whom the cost was incurred. To enter a value in this field, the person must already be entered in the system as a contact.
Cost Type	Specify whether the cost that you are entering is a monetary expense or time spent. Values are stored in UDC 90CB/CT. The system displays fields on this form based on the type of cost you are entering.
Payment Method	Enter a code that represents how the expense was paid. Payment method codes are stored in UDC table 90CB/PM. This field is displayed only when the Cost Type is <i>Expense</i> .
Amount	Enter the total of the expenses for the opportunity. If the cost type is <i>Time</i> , enter the quantity of time. If the cost type is <i>Expense</i> , enter the monetary amount.
Currency Code	Enter the code that represents the currency associated with the amount. This field is displayed only when the cost type is <i>Expense</i> .
Time Type	Enter the type of time that was spent. This field appears only when the cost type code is <i>Time</i> .

Adding New Activities to Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Activities tab. Click the Activities link.

Opportunity - Opportunity - Manage ABC Inc. Opportunity

Opportunity | **Activities** | Sales | Attachments

Activities | [Interactions](#)

[Close](#)

Search

Start Date Range: 15/06/05 End Date Range: 17/06/05

Activity Type: -- Select One -- Calendar Type: -- Select One --

Priority Level: -- Select One -- Date Completed:

[Find](#) [Select](#) [Add](#)

Records 1 - 1

Activity Type	Task	Subject	Start Date	End Date
To-Do or Task	☒	Send proposal documents	16/06/05 00:00:00 UTC	

Opportunity - Manage <Opportunity Name> form: Activities tab: Activities link

To add a new activity to an opportunity:

1. Click the Add button.
2. On the Add Activity form, complete the steps to create a valid activity, and then click the Save and Close button.
3. The system returns you to the Activities tab and displays the new activity in the detail area of the form.

Attaching Action Plans to Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Activities tab. Click the Activities link.

To link an action plan to an opportunity:

1. Click the Link Action Plan button.
2. On the Action Plan Search and Select form, select the action plan that you want to associate with the opportunity, and then click Select.
3. The system returns you to the Activities tab, and displays all of the activities generated from the action plan in the detail area of the form.

Assigning Sales Team Members to Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Sales tab. Click the Sales Team link.

To assign sales team members to an opportunity:

1. Review the existing sales team to determine whether changes are necessary.
The system automatically assigns to the opportunity the sales team members that are actively supporting the customer, based on the system constants, at the time that the opportunity is created.
2. To add additional members to the sales team, click the Assign Sales Team button.
3. On the Sales Team Search and Select form, select the sales team members that you want to add to the opportunity, and then click Select.
4. The system returns you to the Sales tab and lists each member of the sales team in the detail area of the form.

Updating Sales Team Information

Access the Edit Sales Team form.

Edit Sales Team

OK Cancel Tools

Opportunity Number 94 ABC Inc. Opportunity

Sales Person or Group 687 Allarno, Yasmine

Role ACMGR Account Manager

Revenue Percentage 0

Effective Date 16/08/04 00:00:00

End Effective Date 31/12/15 00:00:00

☒ Owner

☐ Apply Commissions

Edit Sales Team form

Role

Enter a value that describes the role that the associated sales team member is performing on this opportunity. Values are stored in UDC H42/RT.

Revenue Percentage

Enter the percentage of the total sale for which the sales team member should receive credit. This value is informational only and does not tie into commissions.

The total of the revenue percentages for all of the members of a sales team cannot exceed 100 percent. For example, if there are two sales team members associated with the opportunity, both cannot have a revenue percentage of 60 percent, as the total would exceed 100 percent.

Owner

Select this option to specify whether the sales team member is the owner of the opportunity. There can be only one owner for each opportunity.

Apply Commissions

Select this option to specify whether the information in the F42140 table is used to calculate commissions for the sales team member. This option is enabled only if a record exists in the F42140 for the sales team member.

Also, this option determines which sales team members are carried forward when an opportunity is converted to a sales order. Only the active members who have the Apply Commissions option selected are added to the sales team of the sales order.

Creating Quotes and Sales Orders for Opportunities

This section provides an overview of quotes and sales orders as they relate to opportunities, lists prerequisites, and discusses how to:

- Edit quotes associated with opportunities.
- Edit sales orders associated with opportunities.

Understanding Quotes and Sales Orders

As the sales team progresses through the sales cycle with an opportunity they might need to provide quotes for products or services in which the customer is interested. Additionally, if the sales cycle is successful, the sales representative might find it necessary to create a sales order to initiate the purchase and shipment process.

You can generate both quotes and sales orders automatically from the opportunity record. To enable the quote and sales order conversion options, you must set the processing options for the Manage Opportunities program. You can then click the Convert to Quote or Convert to Sales Order buttons to create quotes and sales orders directly from the sales opportunity.

After you create quotes or sales orders, you maintain and process those quotes and orders from the PeopleSoft EnterpriseOne Sales Order Management system. You can access the Edit Sales Order form, which is used to update both sales orders and quotes, directly from the opportunity record. You can perform these actions from the Edit Sales Order form:

- Summarize the order.
- Cancel line items.
- Update header information.
- Check the customer's credit.
- Check product availability.
- Check product pricing.
- Reprice the order.
- Review pictures of items.
- Review and update commission information.
- Review price history.
- Review freight information.
- Perform a multi-item search.
- Access the Address Book.
- Submit the order for processing.
- Cancel the order.
- Configure products.

Quotes

When you convert an opportunity record to a quote, the system uses the version of the Sales Order Entry program (P42101) that you specify in the processing options of the Manage Opportunities program to create a quote document. We recommend that you use version ZJDE0003, or a copy of that version, to process sales quotes.

You can create multiple quotes for an opportunity. You can also generate proposal documents, which you can send to the customer, directly from the quote. You can also review all of the quotes associated with an opportunity.

To convert an opportunity to a quote, the opportunity must have a sales cycle step with a probability of greater than zero (0). The quote must also include at least one line item. If a product catalog was selected without an item, the item must be selected. If all of these criteria are not met, you will receive a Cannot Convert error when you click the Convert to Quote button.

When you convert an opportunity to a quote, the system carries forward all of the active sales team members whose Apply Commissions option is selected. The system then calculates commission information, based on the commission constants that are set up for each employee in the F42140.

If the quote has at least one line with a valid item, then that line will be converted. All line items that do not contain valid items will cause the system to produce a warning that all lines cannot be converted. You may choose to ignore this warning and convert only the valid lines into a quote.

After you convert an opportunity to a quote, the system brings you to the Create New Order form, where you can add additional information to the quote, if necessary. You can create multiple quotes for an opportunity. You can also review the quotes from the opportunity forms. When an opportunity is converted to a quote, the system does not copy the media objects associated with the opportunity to the quote.

Sales Orders

When you convert an opportunity record to a sales order, the system uses the version of the Sales Order Entry program (P42101) that you specify in the processing options of the Manage Opportunities program to create a sales order. We recommend that you use version ZJDE0001, or a copy of that version, to process sales orders.

In order to convert an opportunity to a sales order, the opportunity must meet these criteria:

- The opportunity must have a probability of 100 percent.

The opportunity must include a sales cycle that has a probability of 100 percent. If you try to convert the opportunity to a sales order while you are in a sales cycle that has a probability less than 100 percent, you will receive a Cannot Convert error. You must change the sales cycle step for the opportunity to one with a probability of 100 percent to continue with the conversion.

- The opportunity must include at least one line item with an item number (product number).

The line items are used to create the sales order. When the opportunity is converted to a sales order and the product catalog has been selected, but the item has not, the user shall be prompted to select an item. If you attempt to convert an opportunity with no line items to a sales order, you will receive a Cannot Convert error. You must add line items to the opportunity to continue with the conversion.

When you convert an opportunity to a sales order, the system carries forward to the sales order all of the active sales team members whose Apply Commissions option is selected. The system then calculates commission information based on the commission constants that are set up for each sales team member in the F42140 table.

After you convert an opportunity to a sales order, the system brings you to the Create New Order form, where you can add additional information to the sales order, if necessary. You can create multiple sales orders for an opportunity. You can also review the sales orders from the opportunity forms. When an opportunity is converted to a sales order the system does not copy the media objects associated with the opportunity to the sales order.

Prerequisites

Before you complete the tasks in this section:

Set the processing options for the Sales Order Entry program (P42101) versions that are entered in the processing options for the Manage Opportunities program (P90CB020). You enter one version of the Sales Order Entry program to process quotes, and another to process sales orders from the Manage Opportunities program. We recommend using version ZJDE0003 to process quotes, and ZJDE0001 to process sales orders.

You must also set up Document Type Maintenance (P40040) for Sales Quotes. If you do not set this up, the system will not convert opportunities to quotes. To set up document types for Sales Quotes, enter 2 or 3 in the Order Category field on the Sales tab of the Document Type Revisions form.

See Also

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, “Generating Proposals”

PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook, “Setting Up the Inventory Management System,” Setting Up Document Type Information

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook

Forms Used to Create Quotes and Sales Orders for Opportunities

Form Name	Form ID	Navigation	Usage
Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity Management	Select existing opportunities.
Opportunity - Manage <Customer Name> Opportunity	W90CB020A	Select a record on the Search for Opportunities form.	Convert an opportunity to a quote or a sales order.
Edit Sales Order	W42101D	Select a quote or sales order from the Opportunity - Manage <Customer Name> Opportunity form, select the Sales tab, click the Sales Order or Quote link, and then click Select.	Edit a quote or sales order associated with an opportunity.

Editing Quotes Associated with Opportunities

Access the Opportunity - Manage <Customer Name> Opportunity form. Select the Sales tab. Click the Quote link.

Opportunity - Opportunity - Manage ABC Inc. Opportunity

Opportunity | Activities | **Sales** | Attachments

[Sales Team](#) | [Quote](#) | [Sales Order](#)

[Close](#)

Select a Query [Save Query](#) [Edit Queries](#) [View Pending Order](#)

[Find](#) [Select](#)

Records 1 - 1

	Order Number	Order Type	Order Type Description	Sold To Customer	Sold To Customer Name	Ship To Customer	Ship To Customer Name
☐	55	SQ	Sales Quote	333462	ABC Inc.	333462	ABC Inc.

Opportunity - Manage <Opportunity Name> form: Sales tab: Quote link

To review or edit the quote, click the link in the Order Number field. The system brings you to the Edit Sales Order form, where you can review and edit the quote.

Editing Sales Orders Associated with Opportunities

Access the Opportunity - Manage <Opportunity Name> form. Select the Sales tab. Click the Sales Order link.

Opportunity - Opportunity - Manage ABC Inc. Opportunity

Opportunity | Activities | **Sales** | Attachments

[Sales Team](#) | [Quote](#) | **[Sales Order](#)**

[Close](#)

Select a Query [Save Query](#) [Edit Queries](#) [View Pending Order](#)

[Find](#) [Select](#)

Records 1 - 1

	Order Number	Order Type	Order Type Description	Sold To Customer	Sold To Customer Name	Ship To Customer	Ship To Customer Name
☐	1886	SO	Sales Order	333462	ABC Inc.	333462	ABC Inc.

Opportunity - Manage <Opportunity Name> form: Sales tab: Sales Order link

To review or edit the quote, click the link in the Order Number field. The system brings you to the Edit Sales Order form, where you can review and edit the sales order.

CHAPTER 7

Managing Sales Data

This chapter provides an overview of sales data and discusses how to:

- Manage competitor data.
- Forecast sales revenue.

Understanding Sales Data

To be successful, a sales organization must have a comprehensive understanding of the outside forces that contribute to a customer's decision to do business with you. One of the strongest outside forces that can affect a sale is direct competition. If you understand what competitors can deliver, when they can deliver it, and for what price, you can compete effectively.

In addition to understanding the competition, you must also have a complete understating of your own organization, the amount of potential revenue that can be realized in the future, and the amount of demand that exists for your products in the marketplace. Using sales forecasts and sales pipelines, you can determine, with reasonable certainty, the amount of revenue that the organization will generate in the near future. You can also use this information to assist in demand forecasting for products, which enables you to better plan materials and inventory.

Managing Competitor Data

This section provides an overview of competitor data and discusses how to:

- Add a new competitor.
- Enter contact information for a competitor.
- Attach product information to a competitor.
- Add competitor opportunities.
- Set processing options for the Competitor Find Browse program (P6917901).
- Set processing options for the Competitor Detail program (P6917902).

Understanding Competitors

To effectively sell products and services, you must be able to demonstrate to potential customers why an organization's products and services are better than those of competing organizations. To accurately compare an organization against the competition, you must have an understanding of the products and services the competitors provide, their pricing structure, and their business processes.

Using the Competitor Find Browse program (P6917901) and the Competitor Detail program (P6917902), you can track information about competitors. You can attach products to competitor records, and enter information about those products, such as the competitor's price, shipment policies, special product features, or known defects and issues. When you enter a competitor into the system, these tables are updated:

- F90CA060
- F0101
- F0111
- F0116
- F0115
- F01161
- F01151
- F90CA06A

You can also associate a competitor with sales opportunities with which they might be involved. This enables the sales representatives to know who they are competing against when working on a sale. You can then view the pipeline for the competitor. The pipeline gives you an at-a-glance view of the potential revenue that is associated with the sales opportunities in which the organization is competing with a specific competitor.

Lastly, you can use category codes to enter and track information that is specific to the organization's needs. Because the type of competitor information that an organization might want to track varies greatly, we provide you with thirty user-defined category codes that you can configure to track information that is specific to the organization, and the competition. For example, you might want to track how long the competitor has been in business, whether the competitor attended specified marketing events, or if there are internal employees who have worked for the competitor. You can use category codes to track all of this information.

Note. Be aware that category codes are used throughout the PeopleSoft EnterpriseOne system. Therefore, you should work with a system administrator when configuring category code fields to determine which category codes are available for use.

Competitor Products

To fully understand the competition, you must know what they are selling, and what advantages or disadvantages they have when compared to your organization. To track this information, you can attach products to a competitor record, and you can add competitor-specific information to each product.

If your organization sells the same item, or a comparable item, you can attach your organization's item to the competitor record. This enables you to directly compare the competitor's products with the products in your organization that might best compete with the competitor's product.

For example, if your organization sells Widget A, and a competing organization also sells Widget A, you set up Widget A in the system once. You enter your organization's pricing information when you set up the item. You can then attach Widget A to the competitor record, and enter information that is specific to the competitor, such as the pricing the competitor is using when selling the item. Competitor-related item information is stored in the F90CA06A table, and does not affect the setup of the item for your organization.

You enter competitor-specific information about products using the Competitor Item Description and Extended Description fields. These fields are free-form text fields that you can use to hold any alphanumeric data about the competitor's products. Before you can attach a product to a competitor record, you must first create a product item.

Opportunities and Pipeline

Typically, sales representatives find themselves competing against other organizations to win a customer's business. Knowing the competition can be the biggest asset when it comes to closing a sale. If you find that a competitor organization is involved in a sales opportunity, you can associate the competitor with the opportunity.

By associating competitors with opportunity records, you provide sales team members with any easy way to determine which organizations they are competing against. The sales representatives can then look at any product or category code information that might assist them in gaining a competitive edge during the sales cycle. Besides knowing the customer, knowing the competition can be the single most important piece of information when trying to win a sale.

To associate a competitor with an existing opportunity, you access the opportunity record and attach the competitor to the opportunity. At times, you might want to create a new opportunity for a competitor. For example, you might find that one of your customers is working with a competitor organization to purchase products. Now that you are aware that the customer is in the market for the specified product, you might decide to contact them and try and sell them your product. You can create a new opportunity directly from the competitor record. You can then use this opportunity record to track all related sales information.

If you have associated competitors with existing opportunities, or you have added new opportunities to the competitor, you can view the competitor's pipeline. The pipeline displays, at a glance, the amount of potential revenue that the competitor can realize, or that your organization can lose, if the competitor wins the sales. Viewing the competitor's pipeline can also help an organization determine how strong the competition is in the marketplace.

See Also

[Chapter 6, "Managing Sales Opportunities," page 65](#)

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook, "Using the Item Catalog Application"

Forms Used to Manage Competitor Data

Form Name	Form ID	Navigation	Usage
Search for Competitors	W6917901A	Periodic Sales Force Automation Processing (G90CA02), Competitor	Select existing competitors or access forms to add new competitors.
Add Competitor	W6917902B	Click Add on the Search for Competitors form.	Add a new competitor.
Manage <Competitor Name> form	W6917902A	Select a competitor on the Search for Competitors form.	Review and maintain competitor information.
Add Opportunity	W90CB020C	Click the Opportunity link on the Manage <Competitor Name> form, Sales tab, and then click the Add button.	Add a competitor opportunity.

Adding a New Competitor

Access the Add Competitor form.

Competitor - Add Competitor

Save and Close

Save and Continue

Save and Add New

Cancel

Address Number

Search Type

D

Competitor

Name

Bike Palace

Annual Revenue

0.00

Currency Code

USD

US Dollars

Number Of Employees

300

Primary Address

Address Line 1

45 Bike Lane

Address Line 2

Address Line 3

Address Line 4

City

Manchester

State

NH

New Hampshire

Postal Code

03024

Country

USA

County

Add Competitor form

Entering Contact Information for a Competitor

Access the Manage <Competitor Name> form. Select the Competitor tab. Click the Addresses/Phones link.

Attaching Product Information to a Competitor

Access the Manage <Competitor Name> form. Select the Competitor tab. Click the Product link.

Competitor - Competitor - Manage Bike Palace

Competitor Sales Attachments

Detail | Addresses/Phones | **Products**

Save Changes Undo Changes Close

Records 1 - 3				
	Seq No	Short Item No	Description	Competitor Item Description
☐		60011	Mountain Bike, Red	Selling Price - 799.99 (LOWER THAN OURS)
☐		60046	Touring Bike, Blue	Selling Price - 899.99 (HIGHER THAN OURS)
☒				

Delete

Competitor - Manage <Competitor Name> form: Competitor tab: Products link

Competitor Item Description

Enter a brief description of the most important competitor-related information. The system displays text that you enter in this field on the Competitor tab of the Competitor - Manage <Competitor Name> form when you click the Product link. This description should give the sales representative the most important piece of information that they will need when trying to compete against this organization. For example, if you are aware that the competitor's product has a defect, you might enter *DEFECT - handle breaks often* in this field. Alternatively, you might want to display the competitor's price so the sales representative knows, at a glance, whether they can beat the competitor's price. The information that you enter in this field is stored in the F90CA06A table.

Extended Description

Click the link in this field to enter detailed information about the competitor's product. This is a free-form text field that enables you to enter any information that might assist the sales team when competing with this organization for sales of the specified product. The information that you enter in this field is stored in the F90CA06A table.

Adding Competitor Opportunities

Access the Add Opportunity form.

Complete the steps for entering an opportunity. With the exception of the method with which you access the Add Opportunity form, the steps to enter an opportunity for a competitor are the same as those you complete when entering an opportunity for your own organization.

Setting Processing Options for the Competitor Find Browse Program (P6917901)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default settings that are used to process competitor information.

- 1. Competitor Search Type** Use this processing option to specify the search type that the system uses to define competitor records in the address book.

Versions

These processing options specify default versions that are used to process competitor information.

- 1. Address Book MBF (P0100041) Version** Use this processing option to specify the version of the Address Book MBF (P0100041) that the system uses when searching for, and working with competitor records. If you leave this option blank, the system uses version ZJDE0001.

Setting Processing Options for the Competitor Detail Program (P6917902)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Warning! The Competitor Find Browse program is hard-coded to call Version ZJDE0001 of the Competitor Detail program. Therefore, you should use the ZJDE0001 version and you should not create additional versions of this program. You can change the values in the processing options of the ZJDE0001 version.

If you must create a version other than ZJDE0001, you must modify the Competitor Find Browse program to call the newly-created version. Contact the system administrator or PeopleSoft technical support for additional information.

Defaults

These processing options specify default settings that are used to process competitor information.

- 1. Competitor Search Type** Use this processing option to specify the search type that the system uses to define competitor records in the address book.

Versions

These processing options specify default versions that are used to process competitor information.

1. Address Book MBF (P0100041) Version

Use this processing option to specify the version of the Address Book MBF (P0100041) that the system uses when searching for, and working with competitor records. If you leave this option blank, the system uses version ZJDE0001.

Forecasting Sales Revenue

This section provides overviews of sales forecasts and pipelines, lists a prerequisite, and discusses how to:

- Create a sales forecast.
- Associate opportunities with a forecast.
- Set processing options for the Manage Forecasts program (P90CB060).

Understanding Sales Forecasts

To successfully manage the business, you must be able to forecast, or estimate with reasonable certainty, the amount of business that the organization will close in the upcoming months. Using the Manage Forecasts program (P90CB060), you can create sales forecasts that can help you project what the organization's sales will be.

Sales forecasts enable you to review the amount of potential revenue for a specified group of opportunities. You can specify search criteria, and then click the Generate button to automatically generate a group of opportunities. You can enter any of these search criteria to generate the list of opportunities:

- Opportunity Type.
- Sales Team/Sales Team Member.

You can enter the address book number of a sales team or sales team member. The system searches for opportunities that include the specified address book number on the sales team:

- Industry.

The system searches for opportunities whose associated Sold To customer record includes the specified industry.

- Close Date.

The system searches for opportunities whose close date falls within the specified date range.

- Probability.

The system searched for opportunities whose probability is greater than or equal to the value that you enter in the Probability field.

You can also manually select opportunities to add to the forecast. For example, you might want to create a sales forecast that includes all of the opportunities that are associated with a particular customer. Therefore, you can search for, and assign opportunities to the forecast based on the customer number. If necessary, you can also remove opportunities from the forecast.

Lastly, you create a combined list of system-generated and manually-selected opportunities to create a sales forecast. However, if you click the Generate button after you manually add opportunities to the list, the system regenerates the list according to the current search criteria, and all manual changes are lost.

When you create a sales forecast, the system calculates the amount of potential revenue for the selected opportunities. The system calculates the revenue amount for each selected opportunity by multiplying the opportunity's probability by the value in either the Line Item Total or the Potential Amount field. You specify which field is used in the processing options of the Manage Forecasts program. The system then totals the calculated revenue for the selected opportunities and populates the Revenue field. If necessary, you can override this amount by entering an amount in the Override Revenue field.

If you feel that the forecast is an accurate depiction of upcoming sales, you can specify that the forecast should be included in demand forecasting by selecting the Approve for Demand Management option. The organization's manufacturing department can then run the SCBM Outbound Processor program (R34A700) which provides them with information in one of these formats, depending on how the program's processing options are set:

- Information about all opportunities that meet the selection criteria.
- Information about all opportunities that are associated with any sales forecast with the Approve for Demand Management option selected.
- Information about all opportunities that are associated with a frozen sales forecast with the Approve for Demand Management option selected.

See the PeopleSoft EnterpriseOne Advanced Planning Systems documentation on the PeopleSoft Customer Connection website.

After you create, review, and if necessary, update a sales forecast, you can freeze the forecast. When you freeze the forecast, the system disables all of the information on the forecast so that it cannot be changed. The system also creates a point-in-time snapshot of the forecast. The snapshot includes the associated opportunities, as they are at the time the forecast is frozen. If these opportunities change after the forecast is frozen, the snapshot does not change, which provides you with an audit trail of the actual data that was used to create the forecast.

For example, you might create a forecast for Employee A for the month of August. The forecast includes an opportunity with a large amount of potential revenue. You freeze the forecast. After the forecast is frozen, the large opportunity is lost. At the end of the month, you determine that Employee A's actual revenue was far less than the forecasted amount. When you review the forecast, you can see all of the opportunities that were active at the time the forecast was frozen. These opportunity records appear as they were at the time the forecast was frozen. You can then compare the forecast opportunity records against the current records for these same opportunities to determine the cause of the revenue discrepancy.

When you create a sales forecast, the system creates records in these tables:

- F90CB060
- F90CB06A
- F90CB060Z

When you freeze a forecast, the system deletes the record in the F90CB06A table and creates records in these tables:

- F90CB06B
- F90CB06C

Forecast Dates

When you create a new sales forecast, the system automatically populates the date range fields to encompass one month, using the system date as the From Date. You can change the dates if you want to create a forecast for a different period of time.

Revenue Calculation Methods

Sales forecasts include the amount of potential revenue that an organization can expect to generate from a selected group of opportunities during the specified date range. Using the processing options for the Manage Forecasts program, you specify how the system calculates revenue amounts. You can use any of these methods:

- Calculate forecast revenue based on the Potential Revenue field from opportunities.
- Calculate forecast revenue based on the Line Item Total field from opportunities.
- Enter the revenue amount on the forecast.

If you use the Potential Revenue field, the system multiplies the probability of each selected opportunity by the value in the Potential Revenue field. The system then adds these amounts for all of the selected opportunities together and populates the Revenue field with the total.

If you use the Line Item Total field, the system multiplies the probability of each selected opportunity by the value in the Line Item Total field. The system then adds these amounts for all of the selected opportunities together and populates the Revenue field with the total.

Lastly, you can enter a revenue amount directly on the sales forecast. If you enter an amount in the Override Revenue field, the system uses the override value instead of the calculated value, when creating the forecast.

Understanding Sales Pipelines

You can also use sales pipelines to help you forecast the amount of revenue that is associated with active sales opportunities. Active sales opportunities are those that have a probability greater than zero, and less than 100. You can review the sales pipeline for these entities:

- Employees
- Customers
- Contacts
- Competitors
- Forecasts
- Territories
- Industry Groupings

Pipeline Amounts

Sales pipelines are divided into sections by probability percentages. Each pipeline includes these percentage groupings:

- Pipeline Total
- 90-99 percent
- 80-89 percent
- 70-79 percent
- 60-69 percent

- 50-59 percent
- 40-49 percent
- 30-39 percent
- 20-29 percent
- 10-19 percent
- 1-9 percent

The system uses the probability associated with the sales cycle steps on the opportunity to calculate the amount of revenue to enter into the pipeline. The probability is multiplied by the amount in the Potential Amount field. The system then inserts the calculated amount into the pipeline section that is associated with the opportunity's probability. The Line Item Total field is not used to calculate pipeline amounts.

This table illustrates how pipeline amounts are calculated for opportunities:

Opportunity Probability	Line Item Total	Potential Amount	Calculation	Effect on Pipeline
55 percent	Blank	100,000 USD	$100,000 * .55 = 55,000$	55,000 USD is entered into the 50-59 percent section of the pipeline.
55 percent	100,000 USD	Blank	$\text{Blank} * .55 = 0$	Nothing is entered into the pipeline because the calculation resulted in a zero amount.

Prerequisite

To view pipeline amounts, you must have active opportunities in the system. An active opportunity is one with a probability greater than zero and less than 100.

See [Chapter 6, "Managing Sales Opportunities,"](#) page 65.

Forms Used to Forecast Sales Revenue

Form Name	Form ID	Navigation	Usage
Search for Forecasts	W90CB060A	Periodic Sales Force Automation Processing (G90CA02), Forecast	Review existing forecasts or access forms to add new forecasts.
Add Forecast	W90CB060C	Click Add on Search for Forecasts.	Create a new forecast.
Forecast - Manage <Forecast Name> Forecast	W90CB060B	Select a forecast from the Search for Forecasts form.	Review forecast information, including the sales pipeline, and assign opportunities to the forecast.
Search for Competitors	W6917901A	Periodic Sales Force Automation Processing (G90CA02), Competitor	Select existing competitors.

Page Name	Object Name	Navigation	Usage
Manage <Competitor Name> form	W6917902A	Select a competitor on the Search for Competitors form. Click the Pipeline link on the Sales tab.	Review the pipeline for a competitor.
Search for Employees	W90CA040F	Periodic Sales Force Automation Processing (G90CA02), Employee Management	Select an employee.
Employee - Manage <Employee Name>	W90CA040A	Select the employee on the Search for Employees form. Click the Pipeline link on the Sales tab.	Review the pipeline for an employee.
Search for Customers	W90CA080D	Daily Sales Force Automation Processing (G90CA01), Customer Management	Select a customer.
Customer - Manage <Customer Name>	W90CA08AA	Select the customer on the Search for Customers form. Click the Pipeline link on the Sales tab.	Review the pipeline for a customer.
Search for Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact Management	Select a contact.
Contact - Manage <Contact Name>	W90CA07PA	Select the contact on the Search for Contacts form. Click the Pipeline link on the Sales tab.	Review the pipeline for a contact.
Search for Territories	W90CA140K	Sales Force Automation Setup (G90CA03), Territory	Select a territory.
Territory - Manage <Territory Name>	W90CA140A	Select a territory on the Search for Territories form. Click the Pipeline link on the Sales tab.	Review the pipeline for a territory.
Search for Industry Groupings	W90CA12AB	Sales Force Automation Setup (G90CA03), Industry Groupings	Select an industry grouping.
Industry Grouping - Manage <Industry Grouping Name>	W90CA12AA	Select an industry grouping on Search for Industry Groupings. Click the Pipeline link on the Sales tab.	Review the pipeline for an industry grouping.

Creating a Sales Forecast

Access the Add Forecast form.

Forecast - Add Forecast

Description

Comments

Start Date End Date

Revenue Override Revenue

Forecast For *Smith, Heather* Forecast For Contact

Entered By Date Entered

Last Modified Submitted Date

☐ Approved for Demand Management

Add Forecast form

After you have completed this information, click Save and Continue, and proceed to the next task to complete the sales forecast.

Revenue

Review the amount of revenue that the system calculated for selected group of opportunities. This value is calculated using the Potential Revenue field or the Line Item Total field on the opportunities that are associated with the forecast. You specify which field the system uses in the processing options for the Manage Forecast program.

Override Revenue

Enter the amount of revenue that you want to use to create the sales forecast. If you enter a value in this field, the system does not use the value in the Revenue field when creating the forecast. You might enter a value in this field if you have a reason to believe that the calculated amount of revenue is incorrect for some reason.

For example, you might have an opportunity that is very early in the sales cycle, and therefore, has a low probability of closing. However, you might have information that makes you very confident that the sale will close. Therefore, you might want to enter a value that is greater than the value in the Revenue field, as this might more accurately reflect the amount of revenue that should be included in the forecast.

Forecast For

Enter the address book number of the person for whom you are creating the forecast. You can enter any entity that has a record in the F0111 table.

This field is not used when determining which opportunities to associate with the forecast. This field is informational only.

Forecast For Contact

Enter the contact person that is associated with the organization that you entered in the Forecast For field. Enter a value in this field only if you enter an organization in the Forecast For field. If you enter an individual in the Forecast For field, leave this field blank.

Approve for Demand Management

Select this option to specify that this forecast is accurate enough to be considered in demand forecasting and planning. You should select this option only if you believe that the forecast and the associated opportunities are an accurate indication of future demand and could therefore be used for demand calculations.

Associating Opportunities with a Forecast

Access the Forecast - Manage <Forecast Name> Forecast form. Select the Sales tab. Click the Opportunity link.

Forecast - Forecast - Manage Quarterly Forecast

Forecast | **Sales**

Opportunity | [Pipeline](#)

Save Changes | Undo Changes | Close

Criteria

Start Date: 01/07/05 Opportunity Type:

End Date: 30/09/05 Industry:

Probability >= 0 Sales Team: 0

Generate

Assigned Opportunities

Records 1 - 10

	Description	Customer Name	Sales Cycle Step	Close Date	P
☐	Capital System Opportunity	Capital System567	Purchase Bid	23/09/05	▲
☐	2Marshall Bikes Opportunity	2Marshall Bikes	Proposal	18/09/05	
☐	2Holmes Bikes Opportunity	2Holmes Bikes	Proposal	18/09/05	
☐	2Fox Industries Opportunity	2Fox Industries	Proposal	19/09/05	
☐	Capital Bikes	Capital System567	Proposal	21/09/05	
☐	Bikes Galore Opportunity	Bikes Galore	Proposal	26/09/05	▼

Assign Opportunity | Remove

Forecast - Manage <Forecast Name> form: Sales tab: Opportunity link

To associate opportunities with a forecast:

1. Enter a date range.

The system includes the opportunities with a close date that falls within the date range that you specify. If you do not enter a date range, the system includes all active opportunities that have not closed as of the date the forecast is created.

2. To narrow the search for opportunities, complete any of these fields:

- Opportunity Type
- Industry

- Probability

3. Specify the sales team or sales team member that is associated with the opportunities that you want to include in the forecast in the Sales Team field.

The system searches for opportunities that contain the specified address number on the sales team.

4. Click the Generate button to display a list of opportunities that meet the criteria that you entered.

These opportunities are now associated with the forecast.

5. To add additional opportunities to the forecast, click the Assign Opportunity button.
6. On Opportunity Search and Select, locate and select the opportunities that you want to include in the forecast, and then click Select.

If you generated a list of opportunities, the opportunities that you select here are added to the generated list of opportunities. Be aware, if you click the Generate button again, the system regenerates the list of opportunities for the forecast based on the criteria that you define in steps 1 and 2, and discards any manual additions or deletions.

7. To remove an opportunity from the forecast, select the records that you want to remove in the Assigned Opportunities section of the form, and then click the Remove button.
8. When the Assigned Opportunities section of the form includes all of the opportunities that you want to associate with the forecast, click the Save Changes button.

Setting Processing Options for the Manage Forecasts Program (P90CB060)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

These processing options specify how the system processes forecast information.

1. Basis for Revenue Calculation

Use this processing option to specify which field the system uses to calculate the revenue amount for a sales forecast. You can use the Potential Amount field or the Line Item Total field from the selected opportunities. Values are:

1: Potential Amount field

0: Line Item Total field

Version

These processing options specify the version that the system uses to process forecast information.

1. Opportunity

Use this processing option to specify the version of the Manage Opportunity program (P90CB020) that the system uses when creating sales forecasts. If you leave this option blank, the system uses version ZJDE0001.

CHAPTER 8

Using the Mobile Sales Applications

This chapter provides an overview of Mobile Sales applications and discusses how to:

- Set up Mobile Sales.
- Run applications in disconnected mode.
- Work with sales orders in disconnected mode.

Understanding Mobile Sales

PeopleSoft EnterpriseOne Mobile Sales was created to support sales personnel who need to create and modify sales orders on their laptops when they are disconnected from the enterprise server. For example, a sales representative can enter or update order, customer, lead or contact information on a plane, in a hotel room, or at a client site, and then synchronize the data entered when she or he is able to connect to the server.

Data transfer is bi-directional, which means that during synchronization the laptop receives updated information from the server as well as sending new or modified information to the server.

With minor exceptions, applications in disconnected mode look and function almost identically to the way they look and function in connected mode. Some fields or tabs might be disabled or hidden because they are not applicable to a disconnected user. Users must perform these functions when they are working in connected mode.

You can use these PeopleSoft EnterpriseOne applications in disconnected mode:

- Activity
- Calendar
- Lead
- Opportunity
- Customer
- Contact
- Quote Order
- Sales Order
- Forecast
- Item Catalog
- Item Inquiry
- Competitor

- Employee
- Work Center

Mobile Sales Configuration and Setup

Before you can use Mobile Sales applications, each laptop must be configured for Mobile Sales operation. Configuration includes installing and setting up the Intellisync (formerly Synchrologic) software and setting up distributed next numbers for the laptop.

See *PeopleSoft EnterpriseOne PeopleTools 8.94: Mobile Client Installation*

Mobile Sales Processing Overview

Users run in disconnected mode by launching a special version of PeopleSoft EnterpriseOne that is created during Mobile Sales installation. Each Mobile Sales laptop must also contain an installation of the Intellisync data synchronization software, which handles the synchronization between the enterprise server and each laptop.

This sequence of events summarizes the data synchronization process:

1. In disconnected mode, the Intellisync software on the laptop *listens* for changes.
2. In most cases, changes are stored in temporary files on the laptop.
3. Upon synchronization, the changed information is uploaded from the laptop's temporary files to the Intellisync server.
4. During synchronization Intellisync checks for relevant information on the server that was entered since the last synchronization.

Note. Only data that is pertinent to the specific laptop's owner (such as an address change for one of his customers) is transferred from the server.

5. If there is new information on the server, that information is sent from the enterprise server to the Intellisync server, and then to the sales representative's laptop.

Mobile Sales Limitations

Although PeopleSoft EnterpriseOne applications look nearly identical when they are used in disconnected mode, there are some minor limitations. The table lists the limitations and the application affected:

PeopleSoft EnterpriseOne Application	Mobile Sales Limitation
Item Inquiry	• Availability information is not displayed. • The Related Objects tab is disabled. • Service related information is not available for viewing.
Product Catalog	Image media objects are not synchronized.
Employees	• The Search for Employees and Employee - Manage <Employee Name> forms are read-only. • Synchronization rules specify synchronizing only F0101 records with search type E.

PeopleSoft EnterpriseOne Application	Mobile Sales Limitation
Contacts	• The Contact Search and Select form's Delete button applies only to records that exist on the Mobile Sale user's laptop and have not been synchronized to the server. Mobile Sales users cannot delete contacts if the record also exists on the server. • The Contact - Manage <Contact Name> form's Service tab is disabled. • The Email and Mail Merge utilities are not available. • Contact information is disabled on the disconnected laptop during the period after synchronization when information has not been processed on the server.
Customers	• Disconnected users cannot manually enter a new customer number. • Disconnected users cannot create a new line of business, because enabling this might cause duplication errors. • Mobile Sales does not fully support workflow, although Credit Limit workflow is supported as part of the post-synchronization process. • Third-party products such as Vertex are not supported on the disconnected laptop. However, during post-synchronization there is a default Vertex tax area if the Tax Area field is blank or has a valid Vertex tax area. • The Currency Code and Long Address fields are disabled for records that also exist on the enterprise server. • The Account field is hidden for Mobile Sales users because the GL tables are not included in the synchronization process. • Some links on the Related Links tab are not available to Mobile Sales users. • Service-related information is not displayed for Mobile Sales users. • The Parent Number for a customer cannot be edited after synchronization (although it can be edited before synchronizing).
Leads	There is a slightly increased risk of data duplication on the server because during the lead conversion process the duplication check is performed against a subset of Address Book data.

PeopleSoft EnterpriseOne Application	Mobile Sales Limitation
Opportunities	- Mobile Sales does not fully support workflow, although sales cycle step notification in the Opportunity application is supported as part of the post-synchronization process. - The Exposure and Available fields for Credit Check are not displayed in disconnected mode.
Quote Order or Sales Order	- The Order Number, Order Type, and Key Company fields are disabled. - The Credit Check link is disabled. - The Check Availability and Price History buttons are disabled. - Some options are hidden in the Go To and More Row Actions menus. - The Line Availability tab information is hidden.

- Some tabs (such as the Item Inquiry application's Related Objects tab) do not appear in disconnected mode, because its functions can be performed only when connected.
- In the Catalog application and other applications where image media objects are used, images are not synchronized to the disconnected laptop.
- Some columns (such as the Item Inquiry applications' Availability column) do not appear in disconnected mode.

Temporary Tables

In applications other than sales and quote order entry, changes are made directly to live tables during synchronization. Sales orders and quotes created or modified while disconnected from the enterprise server have a pending status and are stored in temporary tables (also called pending tables). During synchronization, these changes are sent to the server for processing, and the live tables are updated.

These pending tables are stored in the local database called Synched Tables. Pending tables are identifiable by *Z1* at the end of the table name. This table lists the pending tables used to create or modify a sales order or quote:

Pending Table Name	Table Description
F4201Z1	Sales order header unedited transaction file.
F4211Z1	Sales order detail unedited transaction file.
F4211CZ1	Sales order detail tag unedited transaction file.
F42150Z1	Header commission unedited transaction file.
F42160Z1	Detail commission unedited transaction file.
F0041Z1	Transaction control file.

Synchronization and Post-Synchronization

During data synchronization, information in the temporary files is sent to the Intellisync server. The Intellisync server in turn sends the temporary file information to the enterprise server, where PeopleSoft EnterpriseOne tables are updated. (In some cases, the live files on the server are updated during synchronization with changes made while disconnected.)

While the laptop is still connected to the Intellisync server, information that was sent to the enterprise server since the last time the user performed a synchronization is sent from the enterprise server to the Intellisync server, and then to the laptop.

During synchronization, a set of synchronization rules built into the software determines which fields are updated on the enterprise server, and which fields on the disconnected laptop are updated from the enterprise server. Synchronization rules ensure that only the changes from the enterprise server that pertain to the laptop owner are updated. These rules also help minimize connection time during synchronization, and manage temporary file size on the disconnected laptop.

In some cases, post-synchronization processing might be required to complete changes initiated during the synchronization process. Since one goal is to minimize connection time during synchronization, post-synchronization finishes the processes begun during synchronization. For example, after a new sales order is created and uploaded, after the Mobile Sales user finishes synchronizing, post-synchronization processing finishes by allocating inventory and updating credit exposure. Connection time would be increased significantly if the Mobile Sales user had to remain connected waiting for these processes to complete.

Any errors that occur during the synchronization and post-synchronization processes (regardless of the Mobile Sales application where the error occurred) are listed in the Work Center application's Mobile Sales queue.

Server and Synchronization Status Codes

Server and synchronization status codes help Mobile Sales users understand the relationship between their disconnected laptop and the enterprise server. The Synchronization Status and Server Status fields appear on the Search for Contacts and Search for Customers forms in the Contact and Customer applications.

The server status code is a flag on the disconnected laptop that determines whether you are able to perform data actions on a record you previously created on the disconnected laptop. When a new record resides only on the disconnected laptop you can modify it as much as you like, but once you synchronize with the enterprise server you cannot make additional changes to the record until you receive a response from the server that you can modify the record. (That is, the server status flag on the disconnected laptop is updated from the server, so you can now perform data actions to the record.)

If you start Mobile Sales and launch an application immediately after you synchronize, the message "Waiting for response from the server" appears on the application form. You will not be able to modify any of the orders you submitted until processing on the server is complete.

Address Book Status Codes

The table summarizes the server status codes and their meanings:

Server Status	Definition
0: Modified on the server	The record with this status was modified on the server side.

Server Status	Definition
1: Modified on the mobile machine	The record with this status was modified on the disconnected laptop side.
2: Synchronized to the server	The record with this code was synchronized from the disconnected laptop to the server. Records with this server status cannot be modified on the disconnected laptop.

These tables have a server status for Mobile Sales users; all are owned by system code 01:

- F0101
- F03012
- F0111
- F0115
- F01151
- F0116
- F01161
- F01112

These business functions have logic that manipulates the server status. Unless otherwise indicated, all business functions are owned by system code 01 and contain logic to update the server status for records that successfully pass validation:

- N0100041 - Address Book master business function (MBF).
- N0100042 - Customer Master MBF.
- N0100059 - AB Effective Address MBF.
- B0100087 - Who's Who MBF.
- B0100090 - Phones MBF.
- B0100089 - Electronic Address MBF.
- B0100071 - Related Person MBF.
- B0100072 - Alternate Address.
- B90CA008 - Update Synchronization and Server Status.

Owned by system code 90CA and called during post-synchronization processing to update the server status for records in error.

The synchronization status code is a flag used to indicate a record's current state in relation to the server. This code determines the post-synchronization processing that should occur on the server. For example, many Address Book business functions validate business functions differently depending on whether the record is in Add mode rather than Change mode.

This table summarizes the synchronization status codes and their meanings:

Synchronization Status	Definition
0: Success	Data synchronization was successful. This status is set on the enterprise server from Address Book business function calls.
1: Add pending server response	The add request was received by the server and is awaiting post-synchronization processing to conduct add validation. This status is set on the disconnected laptop from Address Book business function calls.
2: Change pending server response	The change request was received by the server and is awaiting post-synchronization processing to conduct change validation. This status is set on the disconnected laptop from Address Book business function calls.
3: Add error on server	This status indicates that an error occurred on the server during the add validation process. This status is set on the enterprise server from a post-synchronization business function.
4: Change error on server	This status indicates that an error occurred on the server during the change validation process. This status is set on the enterprise server from a post-synchronization business function.
5: AB at error status	This status indicates that the F0101 record is in error, and therefore the child record is in error. These child records could be marked in error: • All associated Customer Master records (F03012). • All associated Address by Date records (F0116). • Who's Who record line 0 (F0111). This status is set on the enterprise server from a post-synchronization business function.

Synchronization Status	Definition
6: AB error and add pending	This status indicates that the F0101 record is in error, and therefore the child record is in error and pending add validation. These child records could be marked in error: • All associated Customer Master records (F03012). • All associated Address by Date records (F0116). • Who's Who record line 0 (F0111). This status is set on the enterprise server from a post-synchronization business function.
7: AB error and change pending	This status indicates that the F0101 record is in error, and therefore the child record is in error and pending change validation. These child records could be marked in error: • All associated Customer Master records (F03012). • All associated Address by Date records (F0116). • Who's Who record line 0 (F0111). This status is set on the enterprise server from a post-synchronization business function.

These tables have a synchronization status for Mobile Sales users; all are owned by system code 01:

- F0101
- F03012
- F0111
- F0115
- F01151
- F0116
- F01161
- F01112
- F0150

Sales Order Status Codes

The Manage Pending Order form is used to create a new pending order or modify an existing pending order that has not completed processing on the enterprise server. The table lists status codes that appear in the Manage Pending Order form's Pending Order Status column:

Pending Order Status	Definition
1: Available for processing	The pending order can be modified. The order has either not been sent to the server, or was sent to the server and errors were corrected.
2: Edited with errors	The pending order was sent to the server and returned with errors, and can be modified.

Pending Order Status	Definition
3: Currently being worked on	The pending order was sent to the server and is being processed; it cannot be modified.
4: Upload transaction active	The synchronization process has been completed and post-synchronization processing is in process; the pending order cannot be modified.
6: Complete	The synchronization and post-synchronization processing are complete; the order is now live and cannot be modified as a pending order.

Distributed Next Numbers

To enable sales personnel to perform new tasks such as creating new sales orders and assigning order numbers while disconnected from the server, each laptop user is assigned a pool of unique order numbers (distributed next numbers) which are copied to the enterprise server during synchronization. You use the Distributed Next Numbers Refresh program (R0002D1) to assign these numbers. This program should be processed periodically to ensure that all disconnected users have an adequate amount of next numbers available.

Since each laptop user has his own set of unique numbers which are automatically assigned sequentially when he creates new sales orders, there is no possibility of orders erroneously sharing the same order number.

After synchronization and post-synchronization processing when a pending order changes to a live order, the pending order is replaced by a live order number. The new live order includes the pending order number for cross reference purposes.

See *EnterpriseOne Tools 8.94 PeopleBook: System Administration*

Setting Up Mobile Sales

This section provides an overview of Mobile Sales setup and discusses how to:

- Set mobile sales processing options for the CRM Customer Detail program (P90CA080).
- Set mobile sales processing options for the CRM Contact program (P90CA070).
- Set mobile sales processing options for the Recurring Orders Edited Creation program (R40211Z).
- Set processing options for the Mobile Sales Processing Options program (P90CA001).
- Run UBEs that support Mobile Sales.

Understanding Mobile Sales Setup

The processing options in the Customer application determine whether to allow duplicate data entry and duplicate tax ID validation. These customer processing options also determine whether disconnected users have permission to add, change, and in some cases, delete:

- Customers.
- Primary address information.
- Alternate address information.

- Phone and fax information.
- Electronic address information.

The processing option values in the Contact application determine whether disconnected users have permission to add, change, or delete:

- Contacts.
- Alternate addresses.
- Phone and fax information.
- Electronic addresses.
- Related people information.
- Related people phone and fax information.

Understanding Processing Options for Mobile Sales

To use several of the EnterpriseOne applications in disconnected mode, you must set the Mobile Sales processing options associated with those programs. The programs that include Mobile Sales processing options are:

- P90CA080 - CRM Customer Detail program.
- P90CA070 - CRM Contact program.
- R40211Z - Recurring Orders Edited Creation program.
- P90CA001 - Mobile Sales Processing Options program.

Setting Mobile Sales Processing Options for the CRM Customer Detail Program (P90CA080)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Mobile Client

- | | |
|---|---|
| 1. Customer Action Security (Add and Change) | Use this processing option to specify whether a user has the authority to add customers while running on a mobile client. |
| 2. Primary Address Action Security (Add and Change) | Use this processing option to specify whether a user has the authority to add and change primary addresses while running on a mobile client. |
| 3. Alternate Address Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, and delete alternate addresses while running on a mobile client. |
| 4. Phone and Fax Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, and delete phone and fax numbers while running on a mobile client. |

- | | |
|--|---|
| 5. Electronic Address Action Security (Add, Change, and Delete) | Use this processing option to designate whether a user has the authority to add, change, and delete electronic addresses while running on a mobile client. |
| 6. Mobile Duplicate Data Entry | Use this processing option to enable or prevent data entry on the Mobile Client if you use the Address Book system's duplicate data entry feature. If you set this processing option to <i>1</i> , the customer Name, City, and State fields are disabled on the mobile client when maintaining an existing customer. |
| 7. Mobile Duplicate Tax ID Validation | Use this processing option to enable or prevent data entry on the Mobile Client if you use the Address Book system's duplicate data entry feature. If you set this processing option to <i>1</i> , the customer Tax ID and Country fields are disabled on the mobile client when maintaining an existing customer. |

Setting Mobile Sales Processing Options for the CRM Contact Program (P90CA070)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Mobile Client

- | | |
|--|---|
| 1. Contact Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, or delete contact information while running on a mobile client. |
| 2. Alternate Address Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, or delete alternate addresses while running on a mobile client. |
| 3. Phone and Fax Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, or delete contact phone and fax numbers while running on a mobile client. |
| 4. Electronic Address Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, or delete electronic addresses while running on a mobile client. |
| 5. Related People Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, or delete related people while running on a mobile client. |
| 6. Related People Phone and Fax Action Security (Add, Change, and Delete) | Use this processing option to specify whether a user has the authority to add, change, or delete phone and fax numbers for related people while running on a mobile client. |

Setting Mobile Sales Processing Options for the Recurring Orders Edited Creation Program (R40211Z)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

1. Enter '1' to Perform Availability Check and Kit Balancing

Use this processing option to specify whether you want the system to check for item availability and perform kit balancing. Values are:

1: The system checks for item availability and performs kit balancing.

Blank: Availability checking and kit balancing do not occur.

2. Enter '1' to override prices, if ' ' use the Unit Price in F4106

Use this processing option to specify whether you want the option of overriding prices. Values are:

1: The price override option is enabled.

Blank: The price override option is disabled and the values for unit price in the F4106 table are used.

3. Orders to process

Use this processing option to specify whether you want to run this application to process recurring orders or pending sales orders. Values are:

Blank: Process recurring orders.

1: Process pending sales orders.

This option must be set to *1* for Mobile Sales users who want to create and process pending sales orders and quotes.

Version

1. Enter the Version ID of the Sales Order Entry

Use this processing option to enter the user-defined set of specifications that controls how Sales Order Entry applications and reports run.

2. Quote Order Version

Use this processing option to specify the version used to process quote orders. If this option is left blank, the default version (P4210, *ZJDE0003*) is used.

Setting Processing Options for the Mobile Sales Processing Options program (P90CA001)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Versions

- 1. Address Book MBF (P0100041) Version** Use this processing option to specify the version of the Address Book MBF (P0100041) to use when synchronizing disconnected data to the server. If you leave this field blank, the system uses version *ZJDE0001*.
- 2. Customer Master MBF (P0100042) Version** Use this processing option to specify the version of the Customer Master MBF (P0100042) to use when synchronizing disconnected data to the server. If you leave this field blank, the system uses version *ZJDE0001*.
- 3. Who's Who MBF (P0100087) Version** Use this processing option to specify the version of the Who's Who MBF (P0100087) to use when synchronizing disconnected data to the server. If you leave this field blank, the system uses version *ZJDE0001*.
- 4. Batch Sales Order Create (R40211Z) Version** Use this processing option to specify the version of the Batch Sales Order Create (R40211Z) to use when synchronizing disconnected data to the server. If you leave this field blank, the system uses version *ZJDE0007*.

Running UBEs that Support Mobile Sales

Due to some limitations in the third-party application Intellisync, you must run several Universal Batch Engines (UBEs) on a regularly scheduled basis to ensure that Mobile Sales performs optimally. These UBEs can be scheduled to run automatically through the R90CA00 batch process.

Schedule and run these UBEs regularly:

UBE Name	Purpose
R0002D1 Distributed Next Numbers Refresh	To enable each sales representative to have a unique set of next numbers available, you run the R0002D1 program. Running this program enables sales representatives to add and maintain sales data while in disconnected mode, without the possibility of using duplicate next numbers. Running this program on a regular basis ensures that each representative has an adequate amount of next numbers available.
R90CA042 Flat Employee Hierarchy	Because Intellisync cannot use recursive data relationships to subset data, this UBE flattens out employee reporting relationships. For example, an employee might report to different managers on different dates, so the flatten hierarchy needs to be updated routinely. Consequently, Mobile Sales users must exist in the F0150 table either as having subordinates or having a reports-to relationship. Sales Teams Groups from the F42003 table are flattened out. These relationships are stored in the F90CA042 Flat Employee Hierarchy table.

UBE Name	Purpose
R90CA002 Effective Dating for Sales Teams	This UBE reads the F42140 (Customer Master Commission Information) table and creates a list of effective sales team members which is stored in F90CA003 - (F42140) Mirror Table for Synch Filtering. Effective sales team member relationships are also maintained on a realtime basis when sales team alignment occurs, or when the user manually changes sales team members.
R90CA086 Flat Customer Related Address	This UBE stores related address relationships in a flat view in the F90CA086 table (Flat Customer Related Address). This supports, for example, different ship to and sold to addresses. The initial run of the UBE loads the F90CA086, and subsequent changes are captured by running the UBE on a scheduled basis.

Running Applications in Disconnected Mode

This section discusses how to:

- Launch Mobile Sales
- Synchronize data

When you install the Mobile Sales software, the installation tool creates an icon in the laptop's system tray. From this icon, you can start or stop Mobile Sales and also request synchronization.

PeopleSoft EnterpriseOne applications running in disconnected mode look and operate virtually the same as when they are run in connected mode, except for the limitations listed previously.

See *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, "Managing Item Information"; *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, "Using the Item Catalog Application"; *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, "Managing Customer Information"; *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook*, "Managing Item Information"; [Chapter 5, "Managing Sales Leads," page 49](#); [Chapter 6, "Managing Sales Opportunities," page 65](#); [Chapter 7, "Managing Sales Data," Managing Competitor Data, page 91](#); [Chapter 7, "Managing Sales Data," Forecasting Sales Revenue, page 97](#) and *PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, "Using Foundation Calendar".

Forms Used When Running Applications in Disconnected Mode

Form Name	Form ID	Navigation	Usage
Activity - Search for Activities	W01301E	Daily Sales Force Automation Processing (GM90CA01), Activity	Search for, add, delete, or modify activities.
Calendar	W01311E	Daily Sales Force Automation Processing (GM90CA01), Calendar	View, modify, or add activities and appointments on a calendar.
Lead - Search for Leads	W90CB010A	Daily Sales Force Automation Processing (GM90CA01), Leads	Search for or add leads.
Opportunity - Search for Opportunities	W90CB020D	Daily Sales Force Automation Processing (GM90CA01), Opportunity	Search for or add opportunities.
Customer - Search for Customers	W90CA080D	Daily Sales Force Automation Processing (GM90CA01), Customer	Search for or add customers.
Contact - Search for Contacts	W90CA070C	Daily Sales Force Automation Processing (GM90CA01), Contact	Search for or add contacts.
Forecast - Search for Forecasts	W90CB060A	Periodic Sales Force Automation Processing (GM90CA02), Forecast	Search for or add forecasts.
Item Catalog - Select From Catalog	W90CA106B	Periodic Sales Force Automation Processing (GM90CA02), Item Catalog	Find, view, and add catalog items.
Item Inquiry - Search for Items	W90CA100D	Periodic Sales Force Automation Processing (GM90CA02), Item Inquiry	Search for items.
Competitor - Search for Competitors	W6917901A	Periodic Sales Force Automation Processing (GM90CA02), Competitor	Search for or add competitors.
Employee - Search for Employees	W90CA040F	Periodic Sales Force Automation Processing (GM90CA02), Employee	Search for or add employees.
Work Center	W012503F	Foundation (GM90CA04), Work Center	Find or add work center messages.

Launching Mobile Sales

Access the laptop's desktop.

1. Locate the Mobile Sales icon in the system tray and right-click to display options.
2. Select Start Mobile Client to launch Mobile Sales.
3. Use the EnterpriseOne Mobile Sales menu to select the application you want to use.

4. To exit Mobile Sales, close all applications, right-click the Mobile Sales icon, and select Stop Mobile Client.

Synchronizing Data

Access the laptop's desktop.

1. Locate the Mobile Sales icon in the system tray and right-click to display options.
2. Select Synchronize.
3. Monitor synchronization and server status by starting Mobile Sales and accessing the Customer or Contact application.

Current status is displayed in the Server Status and Synchronization Status fields.

Remember that you cannot modify a new sales order after synchronizing it until processing on the server is complete.

Working with Sales Orders in Disconnected Mode

This section provides an overview of disconnected sales orders and the Work Center for mobile sales, and discusses how to:

- Add a new pending quote or order.
- View, change, or delete a pending quote or order.
- View, change, or cancel a live quote or order.

Understanding Disconnected Sales Order Entry and Modification

Sales orders and quotes entered in disconnected mode have a pending status (as opposed to a live status for orders and quotes entered while connected to the enterprise server) and are always stored in pending tables on the Mobile Sales laptop.

Mobile Sales uses four main forms for sales order and quote entry and modification:

- Manage Existing Order
- Manage Pending Order
- Enter New Order
- Edit Sales Order

New Pending Orders

Click Add on the Manage Existing Order form or the Manage Pending Order form to add a new pending quote or sales order. Regardless of which method you use, whenever you add a new order in disconnected mode you create a pending order that is stored in the pending tables awaiting synchronization.

Existing Pending Orders

Mobile Sales includes a new form called Manage Pending Orders. This form lets you modify pending orders, and displays orders that have been entered in disconnected mode and are awaiting synchronization. The Pending Order Status column on this form displays whether the order is available for processing or has already been synchronized and, therefore, cannot be modified as a pending order. (This kind of order must be modified as a live order.)

Pending orders that have been processed with errors (status 2) are highlighted in red in the grid. After you make changes to an order whose status is 2, the status is automatically reset to Available for Processing (status 1). Note that only pending orders with a status of 1 or 2 can be modified.

Unlike live orders, which are canceled, pending orders are deleted. Data for a deleted order is not preserved.

Live Orders

The Manage Existing Order form lets you make modifications to live orders that were previously synchronized to the Mobile Sales laptop, such as a pending order created in disconnected mode that has been successfully synchronized and converted to a live order. That is, when you search for live orders or quotes in disconnected mode, only live orders synchronized to the Mobile Sales laptop are returned in the search results.

When an order is converted from a pending order to a live order, the temporary order number assigned to the pending order is replaced with a permanent order number. This means that if you run a search for a pending order number on the Manage Existing Order form, you will not find the order because the temporary number was replaced with a permanent order number. To help you identify live orders that were converted from pending orders, the Manage Existing Order form includes a field called Original Order Number that contains the temporary number assigned to a pending order before the order was synchronized and converted to a live order.

The Manage Pending Order form also contains a link called View Live Orders that lets you view orders that are no longer pending. After you click this link, you can select a live order to view, modify, or delete on the Edit Sales Order form. You view, change, or cancel a live order in the same way you would while connected to the enterprise server.

Any changes you make to live orders are stored in pending tables until the next synchronization. While in disconnected mode, live orders are canceled, not deleted. Data for a canceled order is not removed.

Work Center for Mobile Sales

The Work Center application contains a new queue for Mobile Sales users. By viewing the Mobile Sales queue, you can find information about synchronization status and any errors that occurred during synchronization.

Forms Used to Work with Sales Orders in Disconnected Mode

Form Name	Form ID	Navigation	Usage
Quote Order - Manage Existing Order	W42101C	Daily Sales Force Automation Processing (GM90CA01), Quote Order	Search for or add quotes.
Quote Order - Enter New Order	W42101D	On Quote Order - Manage Existing Order, click Add.	Add a new sales quote.
Sales Order - Manage Existing Order	W42101C	Daily Sales Force Automation Processing (GM90CA01), Sales Order	Search for or add sales orders.
Sales Order - Enter New Order	W42101D	On Sales Order - Manage Existing Order, click Add.	Add a new sales order.
Manage Pending Orders	W42101A	Click the View Pending Orders link on Manage Existing Order.	Select a pending order to view, modify, or delete.
Edit Sales Order	W42101D	Select a pending order.	View, modify, or delete pending order information for configured items.

Adding a New Pending Quote or Order

Access the Quote Order - Enter New Order or Sales Order - Enter New Order form.

1. Enter information for the new quote or order as you would in connected mode.
2. Click one of these buttons:
 - Summarize Order
 - Submit and Enter New
Submits and clears the fields on the form so you can enter a new quote or order.
 - Submit and Close
Submits and exits the form.
 - Cancel

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, “Entering Sales Orders”.

Sales Order - Enter New Order

[Summarize Order](#)
[Submit and Enter New](#)
[Submit and Close](#)
[Cancel](#)

[Sales Order Header](#)
[Order Summary](#)

Order Number	80	Previous Order Number	
Sold To		Hold Code	
Ship To		Order Date	10/21/04
Branch/Plant		Credit Message	
Customer PO		Temporary Credit Msg	
Currency		Exchange Rate	
		Base Currency	☒ Foreign

[Edit Full Header](#)
[Order Address](#)
[Credit Check](#)
[Attachments](#)
Go To

[Sales Order Detail](#)
[Line Availability](#)
[Free Goods](#)
[Line Defaults](#)

More Row Actions

Records 1 - 1 [Customize Grid](#) > Basic

	Quantity Ordered	UOM	Item Number	Line Type	Requested Date	Unit Price	Extended Price	Last Status	Next Status	Branch/Plant	Location
☐				S							

Enter New Order form

Viewing, Changing, or Deleting a Pending Quote or Order

Access the Manage Pending Orders form.

1. Select the record that you want to view, modify, or delete.
2. Click the link in the Order Number column and make any changes on the Edit Sales Order form.
For a configured item, configured component lines are disabled in the form grid. Any changes are propagated to the components after the order is saved. You can also click the Kit/Configurator button to change the configuration.
3. To delete a pending record, select in the grid the pending orders you want to delete, and then click Delete Line.

Manage Pending Order

Select a Query: SO [Save Query](#) [Edit Queries](#)

Customer Service Inquiry **Additional Selections** Previous Order:

Order Number: * SO * [View Live Orders](#)

Item Number: *

Customer PO: *

Branch/Plant: *

Sold To: *

Ship To: *

☐ Extend Back Order Quantity

☐ Customer Item

Find

No records fetched. [Customize Grid](#)

Order Number	Order Type	Order Co	Line Number	Pending Order Status	Hold Code	Sold To	Sold To Name	Item Number	Description 1	Quantity Ordered	UOM
--------------	------------	----------	-------------	----------------------	-----------	---------	--------------	-------------	---------------	------------------	-----

Manage Pending Order form

Customer Service Inquiry

Order Number

Enter the number that identifies the order.

Item Number

Enter the system-assigned number for the item.

Customer PO

Enter the customer number used as a cross-reference or secondary reference number.

Branch/Plant

Enter the alphanumeric code that identifies the branch or plant.

Sold To

Enter the address book number that corresponds to the customer to whom the order was sold.

Ship To

Enter the address book number that corresponds to the customer to whom the order is shipped.

Transaction Currency Code

Enter the code that indicates the type of currency used for the transaction.

Extend Back Order Quantity

Select this option to indicate whether the system includes the back order quantity as part of the order detail line's total amount.

Customer Item

Select this option to specify whether the customer or supplier cross-reference item number appears. When this option is selected, the cross-reference item number appears.

Additional Selections

From Status Range

Enter the code that indicates the step in the processing cycle that was last completed successfully for this order line.

To Status Range

Enter the user-defined code (system 40, type AT) that indicates the next standard step in the processing cycle for this order type. You set up the steps for the processing cycle on the Order Activity Rules form.

Last or Next	Select Last or Next to indicate which status codes you want the system to use when it selects information to display on this screen. The system retrieves this code from the processing options (if entered). Options are: <i>Last:</i> Display all orders whose last status falls within this range. <i>Next:</i> Display all orders whose next status falls within this range.
From Date Range	Enter the beginning date for the type of date specified in the Date field.
To Date Range	Enter the ending date for the type of date specified in the Date field.
Date	Specify the type of date you entered in the date range. Values are: <i>Order Date</i> <i>Requested Date</i> <i>Scheduled Pick Date</i> <i>Promised Ship Date</i> <i>Promised Delivery Date</i> <i>Original Promised Delivery</i> <i>Actual Ship Date</i> <i>Invoice Date</i> <i>GL Date</i> <i>Cancel Date</i>
Sold To Contact	Enter the number of the contact to whom the order is sold as entered in the Who's Who table.
Ship To Contact	Enter the number of the contact to whom the order is shipped as entered in the Who's Who table.

Viewing, Changing, or Cancelling a Live Quote or Order

Access the Manage Existing Order form.

1. Select the order you want to view, modify, or cancel.
2. Make any desired changes.
3. To cancel an order, select a sales order line and then select Cancel Line from the More Row Actions menu.
4. Click Submit and Close.

Sales Order - Manage Existing Order i ?

Select Find Add Copy Close Form Row Tools

Select a Query Save Query Edit Queries

Customer Service Inquiry Additional Selections Previous Order

Order Number * SO *

Item Number *

Customer PO *

Branch/Plant *

Sold To *

Ship To *

☐ Extend Back Order Quantity

☐ Customer Item

Find

Records 1 - 10 Customize Grid > Basic

	Order Number	Order Type	Order Co	Line Number	Hold Code	Sold To	Sold To Name	Quantity	UOM	Extended Amount	Requested Date	Ship To	Ship To Description
☐	1	SO	00006	1.000		33427	Cliente de Factura	2.0000	EA	51,600	05/19/04	33427	Cliente de Factura Chile
☐	1	SO	04000	1.000		40869	Yelena's Custome	10.0000	EA		06/21/04	40869	Yelena's Customer
☐	2	SO	00200	1.000		4242	Capital System56		EA			4242	Capital System5678901234
☐	3	SO	00200	1.000	C1	4242	Capital System56	1.0000	EA	798.00	07/21/04	4242	Capital System5678901234
☐	4	SO	00006	1.000		33427	Cliente de Factura	1.0000	EA	25,800	05/19/04	33427	Cliente de Factura Chile
☐	4	SO	00010	1.000		87453	Colombia Custom	1.0000	EA	0.15	09/01/04	87453	Colombia Customer
☐	4	SO	00028	1.000		822557	GMF Ecuadorian C	10.0000	KG	100.00	09/07/04	822557	GMF Ecuadorian Customer

Manage Existing Order form

APPENDIX A

Delivered Workflow for PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications

This appendix discusses the delivered workflow for PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools

Delivered Workflow for PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications

This section discusses the PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications workflow.

Opportunity Creation and Sales Cycle Step Change Notification

This section discusses the Opportunity Creation and Sales Cycle Step Change Notification workflow.

Description

Workflow Description	The system sends a workflow message to the active sales team members to notify them when a new opportunity is created, or if the cycle step changes on an existing opportunity.
Workflow Trigger	An opportunity record is created or the sales cycle step on an existing opportunity record changes.
Workflow Action	The active sales team members receive a message in the workcenter, notifying them that a new opportunity has been created or that the sales cycle step of an existing opportunity has changed. The message includes the opportunity description, ID number, previous sales cycle step, current sales cycle step, sales methodology, sold to customer, and the ship to customer.

Workflow Objects

System	90CB
Workflow Object Name	JDECRMCHG
Object ID	N90CB137
Event Description / Function Name	OpportunityWFProcessinginCRM
Sequence / Line Number	3

APPENDIX B

PeopleSoft EnterpriseOne CRM Sales Application Reports

This appendix provides an overview of CRM Sales application reports and allows you to:

- View summary tables of all reports.
- View detail information about selected reports.

PeopleSoft EnterpriseOne CRM Sales Application Reports: A to Z

These tables list the CRM Sales application reports, sorted alphanumerically by report ID. The report tables are broken down into these categories:

- Lead
- Opportunity
- Forecast
- Action Plan/Activity
- Competitor
- Customer
- Employee
- Partner
- Contact
- Product Catalog

Lead

These reports are available for sales leads:

Report ID and Report Name	Description	Navigation
R90CB010A Lead Tracking Report	This report includes all leads that have been entered during the specified date range, organized by lead status.	Leads (G90CA0201), select Lead Tracking

Report ID and Report Name	Description	Navigation
R90CB010B Lead By Product Category Report	This report includes a list of leads for each product line. The report includes the lead name, company, city, and qualification score.	Leads (G90CA0201), select Lead By Product
R90CB010C Lead By Lead Source Report	This report includes a list of leads, organized by lead source. The report includes each lead's name, company, city, state, and phone number. The report also includes the total number of leads per lead source.	Leads (G90CA0201), select Lead By Lead Source
R90CB5161, Version XJDE5160 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5160 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5160)
R90CB5161, Version XJDE5161 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5161 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5161)
R90CB5161, Version XJDE5163 Lead Address Avery Report	This report produces shipping labels for each active lead in the system in Avery 5163 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Shipping Address (Avery 5163)
R90CB5161, Version XJDE5389 Lead Address Avery Report	This report produces index post card labels for each active lead in the system in Avery 5389 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Index Post Card (Avery 5389)
R90CB5161, Version XJDE5663 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5663 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Clear Address (Avery 5663)

Opportunity

These reports are available for sales opportunities:

Report ID and Report Name	Description	Navigation
R90CB020A Opportunities by Channels Report	This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel
R90CB020B Opportunities by Probability Report	This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability
R90CB020C Opportunities by Probability for a Sales Rep Report	This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability For Selected Sales Representatives
R90CB020D Opportunities by Territories Report	This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Territory

Report ID and Report Name	Description	Navigation
R90CB020E Opportunities by Channels for a Sales Rep Report	This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel For Selected Sales Representatives
R90CB020I Opportunity Summary Report	This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.	Opportunity (G90CA0202), select Opportunity Summary

Forecast

These reports are available for sales forecasts:

Report ID and Report Name	Description	Navigation
R90CB06A Forecast - Frozen Forecast Status Report	This report displays a frozen forecast with all of the forecast's associated opportunities as of the current date. The report enables users to review the change, if any, in the dollar amounts for opportunities between the current date and the date the forecast was frozen.	Forecast (G90CA0203), select Frozen Forecast Status
R90CB020F Opportunity Pipeline Review by Close Date Report	This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.	Forecast (G90CA0203), select Pipeline Review By Close Date

Action Plan/Activity

These reports are available for activities and action plans:

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CA0204), select Action Plan Listing

Report ID and Report Name	Description	Navigation
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/Activity (G90CA0204), select Activity - Periodic Planner

Competitor

These reports are available for competitors:

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail Report	This report includes all information about a competitor and their products. You can use this report to compare the products from your organization with those of the competitors.	Competitor (G90CA0205), select Competitor Product Selected

Customer

These reports are available for customers:

Report ID and Report Name	Description	Navigation
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer

Employee

These reports are available for employees:

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List

Partner

These reports are available for partners:

Report ID and Report Name	Description	Navigation
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

Contact

These reports are available for contacts:

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)

Product Catalog

These reports are available for product catalogs:

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

PeopleSoft EnterpriseOne CRM Sales Applications: Selected Reports

These reports are listed alphanumerically by report ID in this appendix.

R90CA1301B - Activities For A Customer Contact Report

This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.

Processing Options for the Activities For A Customer Contact Report (R90CA1301B)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number	Use this processing option to specify which customer phone number to print
Type for Business phone:	on the report. Values are stored in UDC (01/PH).

R90CA13D - Periodic Planner Report

This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.

Processing Options for the Periodic Planner Report (R90CA13D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

These processing options specify the dates that are used when creating the report.

- 1. Begin Date:** Use this processing option to specify the beginning date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.
- 2. End Date:** Use this processing option to specify the end date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.

Print

These processing options specify the types of information to print on the report.

- 1. Include "To Do" Section:** Use this processing option to specify whether the system prints the To Do section on the report. If you leave this option blank, the system includes the To Do section and the Activities section on the report. If you enter 1 in this option, the system includes only the Activities section on the report. Values are:
 Blank: Include To Do Section.
 1: Do Not Include To Do Section.

R90CA080B - Customer/Contact Summary Report

This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.

Processing Options for the Customer/Contact Summary Report (R90CA080B)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default information that is used to process the report.

- 1. Enter Phone Number Type for Business phone:** Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).
- 2. Enter Electronic Address Type for Internet Address (url):** Use this processing option to specify which customer URL to print on the report. Values are stored in UDC (01/ET).

- | | |
|--|--|
| 3. Enter Electronic Address Type for Email address: | Use this processing option to specify which customer email address to print on the report. Values are stored in UDC (01/ET). |
| 4. Enter Type - Address for Work address: | Use this processing option to specify which customer address to print on the report. Values are stored in UDC (01/AT). |

R90CA0101E - Employee Phone List Report

This report includes all active employees in the system, along with their titles and phone numbers.

Processing Options for the Employee Phone List Report (R90CA0101E)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default information that is used to process the report.

- | | |
|---|---|
| 1. Enter Search Type for an Employee: | Use this processing option to specify the search type that is used to identify employees. Values are stored in UDC (01/ST). |
| 2. Enter Phone Number Type for Business Phone: | Use this processing option to specify the phone number type that is used to specify the employee phone number that you want to print on the report. Values are stored in UDC (01/PH). |

R90CA0111A - Contacts for a Customer Report

This report lists each contact, along with the associated contact information for each selected customer.

Processing Options for the Contacts for a Customer Report (R90CA0111A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default information that is used to process the report.

- | | |
|---|---|
| 1. Enter Phone Number Type for Business phone: | Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH). |
| 2. Enter Phone Number Type for Fax number: | Use this processing option to specify which customer fax number to print on the report. Values are stored in UDC (01/PH). |
| 3. Enter Type - Address for Work address: | Use this processing option to specify which customer address to print on the report. Values are stored in UDC (01/AT). |

R90CB010A - Lead Tracking Report

This report includes all leads that have been entered during the specified date range, organized by lead status.

Processing Options for the Lead Tracking Report (R90CB010A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

These processing options specify the date range to use for lead tracking.

- | | |
|-----------------------|--|
| 1. Begin Date: | Use this processing option to specify the beginning date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date. |
| 2. End Date: | Use this processing option to specify the end date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date. |

R90CB020A - Opportunities by Channel Report

This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.

Processing Options for the Opportunities by Channel Report (R90CB020A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Channel report. If you leave this option blank, the system uses USD (United States Dollars).

R90CB020B - Opportunities by Probability Report

This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.

Processing Options for the Opportunities by Probability Report (R90CB020B)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Probability report. If you leave this option blank, the system uses USD (United States Dollars).

R90CB020C - Opportunities by Probability for a Sales Rep Report

This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.

Processing Options for the Opportunities by Probability for a Sales Rep Report (R90CB020C)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default information that the system uses to process opportunity information.

- | | |
|---|---|
| <p>1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:</p> | <p>Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Probability for a Sales Rep report. If you leave this option blank, the system uses USD (United States Dollars).</p> |
|---|---|

R90CB020D - Opportunities by Territories Report

This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.

Processing Options for the Opportunities by Territories Report (R90CB020D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Territories report. If you leave this option blank, the system uses USD (United States Dollars).

R90CB020E - Opportunities by Channels for a Sales Rep Report

This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.

Processing Options for the Opportunities by Channels for a Sales Rep Report (R90CB020E)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunities by Channels for a Sales Rep report. If you leave this option blank, the system uses USD (United States Dollars).

R90CB020F - Pipeline Review By Close Date Report

This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.

Processing Options for the Pipeline Review By Close Date Report (R90CB020F)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Default

These processing options specify the default information that the system uses to process opportunity information.

- | | |
|--|---|
| 1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts: | Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Pipeline Review By Close Date report. If you leave this option blank, the system uses USD (United States Dollars). |
|--|---|

Process

These processing options specify the date range to use for opportunity pipelines.

- | | |
|-----------------------|---|
| 1. Begin Date: | Use this processing option to specify the beginning date in the opportunity close date range. If you leave this option blank, the system uses today's date. |
| 2. End Date: | Use this processing option to specify the end date in the opportunity close date range. If you leave this option blank, the system uses today's date. |

R90CB020I - Opportunity Summary Report

This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.

Processing Options for the Opportunity Summary Report (R90CB020I)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options specify the default information that the system uses to process opportunity information.

1. Provide a Currency Code (for e.g. USD) for calculating Potential and Weighted Potential amounts:

Use this processing option to specify the currency code that is used to determine potential and weighted amounts for the Opportunity Summary report. If you leave this option blank, the system uses USD (United States Dollars).

Glossary of PeopleSoft Terms

activity	A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction. In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.
batch processing	A process of transferring records from a third-party system to PeopleSoft EnterpriseOne. In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect and store-and-forward.
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through

	event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	See named event rule (NER).
business view	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in PeopleSoft EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in PeopleSoft EnterpriseOne General Accounting.
Control Table Workbench	An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
enterprise server	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
EnterpriseOne object	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
EnterpriseOne process	A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System-release number data source. It also updates the Environment Plan detail record to reflect completion.
escalation monitor	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a <i>business unit</i> .
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
interface table	See Z tables.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
in-your-face-error	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	Developed by PeopleSoft, this internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
jargon	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object.
Java application server	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log	The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.
JDENET	PeopleSoft proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all PeopleSoft EnterpriseOne supported platforms.
Location Workbench	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<i>nota fiscal</i>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<i>nota fiscal factura</i>	In Brazil, a <i>nota fiscal</i> with invoice information. See also <i>nota fiscal</i> .

Object Configuration Manager (OCM)	In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
Object Librarian	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build. Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
Package Workbench	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the System-release number data source. It also updates the Package Plan detail record to reflect completion.
PeopleSoft Database	See JDEBASE Database Middleware.
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
pristine environment	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
production environment	A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.
production-grade file server	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.
project	In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
promotion path	The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path): 11>21>26>28>38>01 In this path, 11 equals new project pending review, 21 equals programming, 26 equals QA test/review, 28 equals QA test/review complete, 38 equals in production, 01 equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.
proxy server	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
published table	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
QBE	An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
real-time event	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.
refresh	A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
replication server	A server that is responsible for replicating central objects to client machines.
quote order	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the System-release number data source. It also updates the Server Plan detail record to reflect completion.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems.
table access management (TAM)	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
three-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) monitor	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.
Version List merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

work day calendar	In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
workflow	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
workgroup server	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

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PeopleSoft EnterpriseOne CRM Sales Applications 8.11 Reports

November 2004

PeopleSoft EnterpriseOne CRM Sales Applications 8.1.1 Reports
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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

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While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft EnterpriseOne CRM Sales Application Reports

This appendix provides an overview of CRM Sales application reports and allows you to view summary tables of all reports.

PeopleSoft EnterpriseOne CRM Sales Application Reports: A to Z

These tables list the CRM Sales application reports, sorted alphanumerically by report ID.

Lead

These reports are available for sales leads:

Report ID and Report Name	Description	Navigation
R90CB010A Lead Tracking Report	This report includes all leads that have been entered during the specified date range, organized by lead status.	Leads (G90CA0201), select Lead Tracking
R90CB010B Lead By Product Category Report	This report includes a list of leads for each product line. The report includes the lead name, company, city, and qualification score.	Leads (G90CA0201), select Lead By Product
R90CB010C Lead By Lead Source Report	This report includes a list of leads, organized by lead source. The report includes each lead's name, company, city, state, and phone number. The report also includes the total number of leads per lead source.	Leads (G90CA0201), select Lead By Lead Source
R90CB5161, Version XJDE5160 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5160 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5160)

Report ID and Report Name	Description	Navigation
R90CB5161, Version XJDE5161 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5161 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5161)
R90CB5161, Version XJDE5163 Lead Address Avery Report	This report produces shipping labels for each active lead in the system in Avery 5163 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Shipping Address (Avery 5163)
R90CB5161, Version XJDE5389 Lead Address Avery Report	This report produces index post card labels for each active lead in the system in Avery 5389 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Index Post Card (Avery 5389)
R90CB5161, Version XJDE5663 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5663 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Clear Address (Avery 5663)

Opportunity

These reports are available for sales opportunities:

Report ID and Report Name	Description	Navigation
R90CB020A Opportunities by Channels Report	This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel
R90CB020B Opportunities by Probability Report	This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability

Report ID and Report Name	Description	Navigation
R90CB020C Opportunities by Probability for a Sales Rep Report	This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability For Selected Sales Representatives
R90CB020D Opportunities by Territories Report	This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Territory
R90CB020E Opportunities by Channels for a Sales Rep Report	This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel For Selected Sales Representatives
R90CB020I Opportunity Summary Report	This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.	Opportunity (G90CA0202), select Opportunity Summary

Forecast

These reports are available for sales forecasts:

Report ID and Report Name	Description	Navigation
R90CB06A Forecast - Frozen Forecast Status Report	This report displays a frozen forecast with all of the forecast's associated opportunities as of the current date. The report enables users to review the change, if any, in the dollar amounts for opportunities between the current date and the date the forecast was frozen.	Forecast (G90CA0203), select Frozen Forecast Status
R90CB020F Opportunity Pipeline Review by Close Date Report	This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.	Forecast (G90CA0203), select Pipeline Review By Close Date

Action Plan/Activity

These reports are available for activities and action plans:

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CA0204), select Action Plan Listing
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/Activity (G90CA0204), select Activity - Periodic Planner

Competitor

These reports are available for competitors:

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail Report	This report includes all information about a competitor and their products. You can use this report to compare the products from your organization with those of the competitors.	Competitor (G90CA0205), select Competitor Product Selected

Customer

These reports are available for customers:

Report ID and Report Name	Description	Navigation
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer

Employee

These reports are available for employees:

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List

Partner

These reports are available for partners:

Report ID and Report Name	Description	Navigation
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

Contact

These reports are available for contacts:

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)

Product Catalog

These reports are available for product catalogs:

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

PeopleSoft E1

Lead Tracking Report

From Date: 01/01/99 Through Date: 31/12/05

CON Converted

Company	Name	Lead Owner	Lead Source	Date Received	Qualification	Qualification Goal	Qualification Score
Fox Industries	Fox, Kevin	McLind, Rod		26/04/04	Heath 4/21/2004	12.00	0
2Holmes Bikes	Holmes, Jim	Padmini Company		18/05/04		0.00	0
Howard Spencer Bikes	Spencer, Howard	Suresh Joshi	California Conference	26/05/04	Bike Sales	40.00	0
Best Bikes	Smith, John	Capital System5678901234567890	California Conference	01/06/04	Bike Sales Qualification	15.00	0
Stevens Bikes	Stevens, Bill	Capital System5678901234567890	California Conference	16/06/04	Bike Sales Qualification	15.00	0
Bike Avalanche	Mason, Archie	Capital System5678901234567890	New York Expo	18/06/04	Bike Sales Qualification	15.00	0

Lead by Product Category Report

Product Category: Touring Bikes

Date Received	Lead Name	Company	Location	Status Description	Qualification	
					Goal	Qualification Score
01/06/04	Smith, John	Best Bikes	Denver CO	Converted	15	0
26/05/04	Spencer, Howard	Howard Spencer Bikes	Denver CO	Converted	40	0
Count of Leads:		2				

PeopleSoft E1
Lead By Lead Source Report

Name	Company	City	Phone
Alok Tyagi	PeopleSoft	Charlotte	()
Barbara Jones	Hewlitt	WESTMINSTER	()
Bill Stevens	Stevens Bikes	Denver	()
Elliot Franklin	Hardware Associates	SHERIDAN	()
George Smith	Bikes Galore	Denver	()
Howard Roberts	Granger Enterprises	Boulder	()
JD Sampson	Olson MicroSystems	CENTENNIAL	()
Jim Holmes	2Holmes Bikes	Denver	()
Jim Holmes	Dirty Mountain Cycles	Denver	()
Jim Holmes	Holmes Bikes	Denver	()
Joe Allen	Joe the Stuff	ABC City	()
Joe Groshong	Agilent Technologies	Fort Collins	()
Joe Smith	dddd	denver	()
John Marshall	2Marshall Bikes	Denver	()
John Marshall	Marshall Bikes	Denver	()
John Smith	Best Bikes	Denver	()
Kevin Fox	Fox Industries	charlotte	()
Kevin Fox	Blood Sweat and Tears Cycle Supplier	Charlotte	()

Opportunities by Probability Report
All Amounts on the report are displayed in U.S. Dollar

Probability of 10%

Customer	Opportunity Description	Probability %	Potential Amount	Weighted Potential Amount
Agilent Technologies	Agilent	10%	30,000.00	3,000.00
Bikes Galore	Bikes Galore Opportunity	10%	10,000.00	1,000.00
Capital	Capital System Opportunity	10%	10,000.00	1,000.00
System567890123456789012345				
Howard Spencer Bikes	Howard Spencer Bikes Opportunity	10%	100,000.00	10,000.00
Lewis Bike Company	Lewis Bike Company Opportunity	10%	10,000.00	1,000.00
Stevens Bikes	Stevens Bikes Opportunity	10%	10,000.00	1,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	10,000.00	1,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	50,000.00	5,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	10,000.00	1,000.00
Number of Opportunities: 9			Totals: 240,000.00	24,000.00

Opportunities by Territories Report

All Amounts on the report are displayed in U.S. Dollar

Teng Territory

Customer	Opportunity Description	Probability %	Potential Amount	Weighted Potential Amount
ABC Inc.	ABC Inc, Opportunity 2	20%	12,000.00	2,400.00
Agilent Technologies	Agilent	10%	30,000.00	3,000.00
Bikes Galore	Bikes Galore Opportunity	10%	10,000.00	1,000.00
Cat Food Inc.	Cat Food Inc. Opportunity	40%	1,000.00	400.00
Howard Spencer Bikes	Howard Spencer Bikes Opportunity	10%	100,000.00	10,000.00
Lewis Bike Company	Lewis Bike Company Opportunity	10%	10,000.00	1,000.00
Mass Harbor Technology	Technology for Mass Harbor	20%	15,000.00	3,000.00
Mass Harbor Technology	Mass Harbor Inside Sales	20%	20,000.00	4,000.00
Number of Opportunities: 8		Totals:	198,000.00	24,800.00
Total Number of Opportunities: 8		Grand Totals:	198,000.00	24,800.00

Opportunities by Channels for a Sales Rep. Report

All Amounts on the report are displayed in U.S. Dollar

Sales Rep: Allen,Ray

AB #: 6001

Opportunity Channel Type: Direct DIR

Customer	Opportunity Description	Probability%	Budget Amount	Potential Amount	Weighted Potential Amount
William Smith Bikes	William Smith Bikes Opportunity	10%	50,000.00	50,000.00	5,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	10,000.00	10,000.00	1,000.00
Number of Opportunities: 2			Totals: 60,000.00	60,000.00	6,000.00
Total Number of Opportunities for Allen,Ray 2			Totals: 60,000.00	60,000.00	6,000.00
Total Number of Opportunities: 2			Grand Totals: 60,000.00	60,000.00	6,000.00

Opportunity Pipeline Review by Close Date Report

From Date: 01/01/99 Through Date: 31/12/05

All Amounts on the report are displayed in U.S. Dollar

Probability of 10%

Customer	Opportunity Description	Sales Methodology	Sales Cycle	Owner	Lead Source	Prob %	Date Created	Closed Date	Potential Amount
Capital	Capital System Opportunity	Bike Sales	Proposal	Not Assigned		10%	18/08/04	27/09/04	10,000.00
System567890123456789012345									
Bikes Galore	Bikes Galore Opportunity	Bike Sales	Proposal	Not Assigned	California Conference	10%	26/05/04	26/09/04	10,000.00
Howard Spencer Bikes	Howard Spencer Bikes Opportunity	Bike Sales	Proposal	Not Assigned	California Conference	10%	26/05/04	26/09/04	100,000.00
Stevens Bikes	Stevens Bikes Opportunity	Bike Sales	Proposal	Not Assigned	California Conference	10%	19/08/04	16/10/04	10,000.00
Agilent Technologies	Agilent	Bike Sales	Proposal	Not Assigned		10%	21/06/04	17/10/04	30,000.00
William Smith Bikes	William Smith Bikes Opportunity	Bike Sales	Proposal	Not Assigned	Purchased list	10%	24/08/04	24/10/04	10,000.00
William Smith Bikes	William Smith Bikes Opportunity	Bike Sales	Proposal	Not Assigned	Purchased list	10%	24/06/04	24/10/04	50,000.00
William Smith Bikes	William Smith Bikes Opportunity	Bike Sales	Proposal	Not Assigned	Purchased list	10%	24/06/04	24/10/04	10,000.00
Lewis Bike Company	Lewis Bike Company Opportunity	Bike Sales	Proposal	Not Assigned		10%	28/06/04	28/10/04	10,000.00
Number of Opportunities: 9								Totals:	240,000.00
								Averages:	26,666.67
Total Number of Opportunities: 16								Grand Totals:	291,600.00
								Grand Average:	18,225.00

PeopleSoft E1
Opportunity Summary Report

All the Currency Amounts displayed in Canadian Dollar

Opportunity Number:	40	Owner:	Not Assigned
Description:	Bikes Galore Opportunity		
Opportunity Type:	Direct	Lead Source:	California Conference
Partner:		Partner Contact:	
Sold To Customer:	Bikes Galore	Sold To Customer Contact:	George Smith
Ship To Customer:	Bikes Galore	Ship To Customer Contact:	Not Assigned
Qualification Id:	Bike Sales	Potential Amount:	14,220.00
Qualification Goal:	50	Budget Amount:	14,220.00
Qualification Score:	0	Line Item Total:	
Sales Methodology:	Bike Sales	Associated Cost:	
Sales Cycle Name:	Proposal	Total Expense:	
Probability:	10%	Total Time (HRS):	
		Date Entered:	26/05/04
		Close Date:	26/09/04

Sales Drivers

Qualifications

Activities

Forecast - Frozen Forecast Status Report

Forecast: Sales Forecast 2004 Q3 and Q4

Id: 33

Customer	Opportunity Description	Owner	Close Date	Probability%	Potential Amount	Weighted Potential Amount	Currency Code
Bikes Galore	Bikes Galore Opportunity		26/09/04	10%	10000.00	1,000.00	U.S. Dollar
Howard Spencer Bikes	Howard Spencer Bikes Opportunity		26/09/04	10%	100000.00	10,000.00	U.S. Dollar
Stevens Bikes	Stevens Bikes Opportunity		16/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/06/04	100	10000.00	10,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	50000.00	5,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/06/04	100	10000.00	10,000.00	U.S. Dollar
Global Enterprises	Global Ent - Increased Storage Requirements		27/08/04	0	65000.00		U.S. Dollar
ABC Inc.	ABC Inc, Opportunity 2		18/08/04	20%	12000.00	2,400.00	U.S. Dollar
Mass Harbor Technology	Commercial Technology Division		24/08/04	0	500000.00		U.S. Dollar
Agilent Technologies	Agilent Commercial Opportunity		24/08/04	0	500000.00		U.S. Dollar
Howard & Assoc	Howard's South Eastern Opportunity		24/08/04	0	600000.00		U.S. Dollar
Mass Harbor Technology	Technology for Mass Harbor		30/12/04	20%	15000.00	3,000.00	U.S. Dollar
Mass Harbor Technology	Mass Harbor Inside Sales		30/12/04	20%	20000.00	4,000.00	U.S. Dollar
Mass Harbor Technology	Mass Harbor HR		30/08/04	0	36000.00		U.S. Dollar
Mass Harbor Technology	Mass Harbor Sales		30/08/04	0	36000.00		U.S. Dollar
DNT Customer	DNT Spring Sale		01/09/04	0	12000.00		U.S. Dollar

Opportunity Status as of: 26/10/04 8:47:31

Customer	Opportunity Description	Owner	Close Date	Probability%	Potential Amount	Weighted Potential Amount	Currency Code
Bikes Galore	Bikes Galore Opportunity		26/09/04	10%	10000.00	1,000.00	U.S. Dollar
Howard Spencer Bikes	Howard Spencer Bikes Opportunity		26/09/04	10%	100000.00	10,000.00	U.S. Dollar
Stevens Bikes	Stevens Bikes Opportunity		16/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/06/04	100	10000.00	10,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	50000.00	5,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/06/04	100	10000.00	10,000.00	U.S. Dollar
Global Enterprises	Global Ent - Increased Storage Requirements		27/08/04	0	65000.00		U.S. Dollar
ABC Inc.	ABC Inc, Opportunity 2		18/08/04	20%	12000.00	2,400.00	U.S. Dollar
Mass Harbor Technology	Commercial Technology Division		24/08/04	0	500000.00		U.S. Dollar
Agilent Technologies	Agilent Commercial Opportunity		24/08/04	0	500000.00		U.S. Dollar
Howard & Assoc	Howard's South Eastern Opportunity		24/08/04	0	600000.00		U.S. Dollar
Mass Harbor Technology	Technology for Mass Harbor		30/12/04	20%	15000.00	3,000.00	U.S. Dollar