

Oracle® Sales
Implementation Guide
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Oracle Sales Implementation Guide, Release 12

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Primary Author: Krishna Subhaga

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Sales Implementation Guide*.

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

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

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

- Oracle Application Framework

To learn more about the Oracle Applications Framework, see the guides available through the Oracle Application Framework Documentation Resources, Release 12, Oracle MetaLink Note 391554.1.

- The Oracle Applications graphical user interface

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

How To Use This Guide

The Oracle Sales Implementation Guide contains the information you need to implement Oracle Sales.

- Chapter 1 provides an overview of Oracle Sales.
- Chapter 2 lists the mandatory and optional dependencies for Oracle Sales.
- Chapter 3 describes the setup tasks that you perform in Oracle Sales.
- Chapter 4 describes the tasks that you can perform to configure Oracle Sales to suit

your business requirements.

- Appendix A lists the profile options necessary to implement Oracle Sales.
- Appendix B lists the lookup types and codes for Oracle Sales.
- Appendix C describes the seeded views used in Oracle Sales.
- Appendix D lists the roles necessary to implement Oracle Sales.
- Appendix E lists the concurrent programs used when implementing Oracle Sales.
- Appendix F provides guidelines for setting up the PLM product hierarchy for forecasting.
- Appendix G provides information on interoperating Oracle Sales and Oracle TeleSales.
- Appendix H provides information on customizing the business activities shown in the Customers and Contacts details pages.
- Appendix I answers frequently asked questions by Oracle Sales users.

See Related Information Sources on page xv for more Oracle Applications product information.

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Structure

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- G Oracle Sales - Oracle TeleSales Interoperability**
- H Customer and Contact Business Activities Plug-Ins**
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Related Information Sources

Other Information Sources

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

If this guide refers you to other Oracle Applications documentation, use only the current release versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation-** See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on OracleMetaLink and is updated frequently.
- **Online Help -** You can refer to the Oracle Applications Help System for current

HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle *MetaLink*.

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Guides Related to This Product

Oracle Sales User Guide

This manual provides information on how to use Oracle Sales. It includes procedural information, describing in detail how to use each functionality.

Oracle Marketing Implementation Guide

This guide contains information on implementing Oracle Marketing. Oracle Marketing automates the entire marketing process from campaign planning, budget management, and list creation to execution and analysis.

Oracle Proposals Implementation Guide

This guide contains information on implementing Oracle Proposals. Oracle Proposals enables you to generate dynamic proposals using templates. Oracle Proposals streamlines proposal creation by automating tasks. You can generate proposals from templates that package recurring proposal elements such as cover letters, executive summaries, and product descriptions.

Oracle Quoting Implementation Guide

This guide contains information on implementing Oracle Quoting. Oracle Quoting enables the creation and management of customer quotes across all sales and interaction channels. Organizations can use Oracle Quoting to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle. Oracle Sales uses Oracle quoting functionality for sales supplements for sales coaches, account plans, and strategic information.

Oracle Territory Manager Implementation Guide

This guide contains information on implementing Oracle Territory Manager. Oracle Territory Management assigns business objects (customers, opportunities, and leads, for example) to resources based on configured business rules.

Oracle TeleSales Implementation Guide

This guide contains information on implementing Oracle TeleSales. Oracle Telesales is an application designed for interaction center professionals, whether they are inbound or outbound agents, providing provides tools to manage the sales cycle, from prospecting to booking orders.

Oracle Daily Business Intelligence Implementation Guide

This guide contains information on implementing the various Daily Business Intelligence Reports, including Daily Business Intelligence for Sales.

Oracle Projects Implementation Guide

This guide contains information on implementing Oracle Projects. In Oracle Sales, Oracle Projects provides visibility of projects related to specific opportunities.

Oracle Partner Management Implementation Guide

This guide contains information on implementing Oracle Partners. Oracle Partners provides sales representatives with the capability to determine the sales channel for a lead or opportunity.

Oracle Incentive Compensation Implementation Guide

This guide contains information on implementing Oracle Incentive Compensation. Oracle Incentive Compensation provides information on sales commissions, bonuses, and payment adjustments.

Oracle Advanced Product Catalog User Guide

This guide provides product category and product hierarchy information.

Oracle Trading Community Architecture User Guide

This guide provides information on using features in the Trading Community Manager and the Resource Manager.

Oracle Trading Community Architecture Reference Guide

This guide contains seeded relationship types, seeded Data Quality Management data, Dun and Bradstreet data elements, import interface tables fields and validations.

Oracle Trading Community Architecture Administration Guide

This guide describes the administration and implementation of Oracle Trading Community Architecture (TCA) and Resource Manager. You set up and manage TCA tools, functionality, and concepts that affect data in the TCA Registry and the Data Quality Management features within the Trading Community Architecture.

Oracle Sales for Handhelds Implementation Guide

The guide contains information on setting up Oracle Sales for Handhelds, an application that enables sales representatives to manage their sales activities using handheld devices.

Oracle Web Applications Desktop Integrator Implementation Guide

This guide contains information on setting up Oracle Web Applications Desktop Integrator, which enables users to control spreadsheet formatting and download.

Oracle XML Publisher User Guide

This guide contains information on using Oracle XML Publisher to convert account plans to PDF document format.

Oracle Common Application Calendar User's Guide

This guide contains information on using Oracle Common Application components, such as Notes and Tasks.

Oracle Workflow User's Guide

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

Oracle General Ledger User Guide

This guide describes how to use the Oracle General Ledger.

Oracle General Ledger Implementation Guide

This guide describes how to implement the Oracle General Ledger.

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 12, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you must perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications to Release 12. This guide describes the upgrade process and lists database and product-specific upgrade tasks.

Maintaining Oracle Applications Documentation Set

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Workflow Administrator's Guide

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

Training and Support

Training

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

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

Support

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

OracleMetaLink

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

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

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

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a

complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

Introduction

This chapter covers the following topics:

- Oracle Sales Overview
- Key Oracle Sales Features
- Access to Oracle Sales

Oracle Sales Overview

Oracle Sales is an enterprise application for sales professionals that simplifies and optimizes the task of planning and managing the sales process. Oracle Sales simplifies the sales process by providing visibility into the sales cycle, helping companies plan and manage effective selling activities. It is integrated in the E-Business Suite and covers key field sales flows from leads to opportunities to quotes. Oracle Sales is integrated with daily business intelligence, territory management, trading community architecture, quoting, inventory, service contracts, order management, proposals, partners, projects, incentive compensation, and marketing. Oracle Sales has been developed using the standard Oracle Applications (OA) Framework. It is optimized for use with wireless.

Key Oracle Sales Features

Oracle Sales includes the following features:

- **Streamlined creation and management of customers, contacts, leads and opportunities:** Oracle Sales supports management of customers of type Organization for B2B and type Person for B2C scenarios. You can create new leads manually, import leads from Oracle Marketing using the sales campaign tool, or use leads entered by TeleSales agents. Oracle Sales assists in tracking these leads and routing them to the appropriate sales representative, enabling the conversion of leads to opportunities. After conversion, you can update opportunity details and track opportunity progress.

- **Ability to track interactions with customers:** Oracle Sales employs notes functionality to track customer interactions. You can enter notes for leads, opportunities, customers, contacts, and forecasts. E-mail interactions are tracked using integration with Oracle Sales for Handhelds.
- **Competitor tracking:** Within each opportunity, at the product level, you can include competitor information such as name, product, and win/loss status. Additionally, Oracle Sales has defaulting capabilities that match products in the opportunity to potential competitor products.
- **Convenient customer analysis:** Important customer information is integrated into the leads and opportunities pages in Oracle Sales. While working on leads or opportunities, you can view information such as a list of all products that a customer has currently purchased that have service contracts, a list of current and past opportunities, a 12 month service summary, and a list of existing service requests. This provides you with background information on the account as you develop leads and opportunities.
- **360 Degree View in Oracle Sales:** The application offers you a view of:
 - Orders and returns
 - Opportunities
 - Leads
 - Proposals
 - Quotes
 - Campaigns
 - Sales Contracts
 - Sales Agreements
 - Service Contracts
 - Service Requests Backlog
- **Integrated product information:** Oracle Sales enables you to add product information to leads and opportunities to track the goods or services customers might want to purchase. The products that you can add are defined and categorized in Oracle Inventory.
- **Sales team management:** Sales team data is integrated into the leads, opportunities, and customer pages in Oracle Sales. Sales team members can be added to a lead,

opportunity, or customer manually, or by using Territory Manager to build the sales team according to predefined business rules.

- **Customized flexfields:** Salespeople can use global and context-sensitive descriptive flexfields to enter additional information for leads, opportunities, customers, and contacts. Flexfields are defined by your organization, and enable unique information to be entered, stored, and managed using the Oracle Sales application.
- **Forecasting:** Oracle Sales provides sales organizations with flexibility in managing their forecasts. Sales organizations can analyze their forecast data at opportunity and product levels, enabling management teams to judge the overall health of their organization.
- **Attachments:** Sales representatives and managers can add external documents, web addresses, and text to opportunities, leads, customers, contacts, and forecasts.
- **History Tracking:** Oracle Sales enables history tracking for leads and opportunities (including product and non-revenue opportunities).
- **Account Plans:** Complete plans to enable you to manage your customer relationships to produce sales.
- **Reporting:** Oracle Sales provides opportunity reports.
- **Business hierarchy:** A display of the structure and relationships of a business give you a view into your customer.
- **Advanced search tools:** You can search leads, opportunities, customers, and contacts using powerful search tools. For leads and opportunities, you can save the search results for future use.
- **Sales Offline:** Oracle Sales integrates with Oracle Sales Offline, to enable sales representatives to manage sales efforts remotely.
- **Proposals:** Oracle Sales integrates with Oracle Proposals to provide sales representatives with the ability to create proposals and send collateral.
- **Quoting:** Oracle Sales integrates with Oracle Quoting to provide sales representatives with the ability to create a quote from an opportunity.
- **Partners:** Oracle Sales integrates with Oracle Partners to provide sales representatives with the ability to determine the sales channel for a lead or opportunity.
- **Projects:** Oracle Sales integrates with Oracle Projects to capture project costs related to the pursuit of opportunities.

- **Incentive Compensation:** Oracle Sales integrates with Oracle Incentive Compensation to enable you to view sales commissions, earnings statements, attainment summaries, and year to date summaries.
- **Preference settings:** Preferences for defaults for key values for leads, opportunities, forecasting, sales coach and account planning.
- **Multi-operating unit access:** Access to business objects across operating units based on your access rights. These include selected business activities, products added to leads or opportunities, quotes, and products under service contract.

Access to Oracle Sales

User Access to Oracle Sales

To access Oracle Sales, log in to Oracle Self-Service Applications, using the Sales User or the Sales Manager responsibility. The Sales User responsibility takes you directly to the Oracle Sales Dashboard. The Sales Manager responsibility takes you to the Sales Manager Dashboard. The Sales Manager dashboard displays Daily Business Intelligence information. Managers can access Oracle Sales functionality from the links listed in the Shortcuts.

If your business has more than one operating unit or organization, the Multiple Organization Access Control (MOAC) feature enables you to access more than one operating unit at a time. This means that you can access multiple operating units while logged in under a single responsibility. You can perform business tasks across any of the operating units to which you have access without having to switch responsibilities.

Navigation for Sales Representatives, Sales Admins, and Sales Managers

Sales Representative users access the application through the Sales Dashboard page. This page provides a summary of the sales representative's business activities as well as links to other portions of Oracle Sales. For example, if the user wants to see leads data, the user can access the Sales Dashboard and then click the Leads link in the Shortcuts.

Sales Admin and Sales Manager users access the application through the Sales Manager Dashboard. The Sales Manager Dashboard includes information on pipeline, weighted pipeline, sales forecasts, and won and lost opportunities. Also included are booked orders and recognized revenue information.

Verifying Dependencies and Integrations

This chapter covers the following topics:

- Oracle Sales Mandatory Dependencies
- Oracle Sales Conditional Dependencies
- Oracle Sales Optional Integrations

Oracle Sales Mandatory Dependencies

Oracle Sales depends on other Oracle applications to provide additional functionality. Some of these are mandatory dependencies that are required for Oracle Sales to function properly.

Oracle Sales requires that the following applications be completely installed and implemented:

- **Oracle Applications Framework:** Provides the framework and user interface for Oracle Sales. Enables personalization of the Oracle Sales user interface. To learn more about the Oracle Applications Framework, see the guides available through the Oracle Application Framework Documentation Resources, Release 12, Oracle MetaLink Note 391554.1.
- **Oracle General Ledger:** Provides daily conversion rates for currency conversion. Refer to the *Oracle General Ledger User Guide* for complete setup information.
- **Oracle Inventory:** Provides all product information. Refer to the *Oracle Inventory User's Guide* for complete setup information.
- **Oracle Product Lifecycle Management:** Provides product category and product hierarchy information. Refer to the *Oracle Advanced Product Catalog User's Guide* for complete setup information.
- **Oracle Sales Daily Business Intelligence:** Refer to the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* for information on setting up and

enabling Sales DBI.

- **Oracle Trading Community Architecture:** Provides customer and contact information. Refer to the *Oracle Trading Community Architecture Administration Guide*.
- **Oracle CRM Application Foundation:** Refer to the *Oracle Applications CRM System Administration Guide*.
- **Oracle Common Application Calendar:** Provides calendar, notes, and tasks information. Refer to the *Oracle Common Application Calendar Implementation Guide*.

Oracle Sales Conditional Dependencies

Conditional dependencies are modules or applications that you must set up if you want to expose a particular feature of Oracle Sales. For example, for your users to see partner information, you must implement Oracle Partners.

- **Oracle Daily Business Intelligence:**
 - Data for the Dashboard Top Customers table
 - Revenue amounts for the account plan revenue objectives (DBI Customer Fulfillment Management)
 - Service and Service Contracts

You must implement the following DBI areas to view this information:

Service: Provides information for the Service Requests Summary bin.

Service Contracts and Supply Chain: Provides information for the Top Customers table and the Products Under Contracts bin, account plans, and Revenue Objectives.

Refer to the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* for setup information.

- **Oracle Marketing:** Provides marketing campaign data and competitor information. Refer to the *Oracle Marketing Implementation Guide* for complete setup information.
- **Oracle Proposals:** Allows sales representatives to create customized proposals to distribute to customers. Refer to the *Oracle Proposals Implementation Guide* for setup information.
- **Oracle Quoting:** Allows sales representatives to create quotes from opportunities and enables sales supplement creation for sales coach, account plan, and contact strategic information. Refer to the *Oracle Quoting Implementation Guide* for setup information.

- **Oracle Partners:** Provides sales representatives with the capability to determine the sales channel for a lead or opportunity and customer external sales team. Refer to the *Oracle Partner Management Implementation Guide* for setup information.
- **Oracle Projects:** Provides visibility of projects related to specific opportunities. Refer to the *Oracle Projects Implementation Guide* for setup information.
- **Oracle Incentive Compensation:** Provides information on sales commissions, year to date summaries, earnings statements, and attainment summaries. Refer to the *Oracle Incentive Compensation Implementation Guide* for setup information.
- **Oracle Service:** Provides a list of all customer's service requests. Refer to the *Oracle Field Service Implementation Guide* for setup information.
- **Oracle Service Contracts:** Provides service contract details for service items. Refer to the *Oracle Contracts Core Implementation Guide* for complete setup information.
- **Oracle Territory Manager:** Assigns sales teams to leads, opportunities, and customers based on sales territory definitions. Refer to the *Oracle Territory Manager Implementation Guide* for complete setup information.
- **Oracle Sales Offline:** Provides sales representatives with mobile sales information management functionality. Refer to the *Oracle Sales Offline Implementation Guide* for complete setup information.
- **Oracle Web Applications Desktop Integrator:** On the Forecast page (through the Export Opportunities button), you can download opportunities into a Web Applications Desktop Integrator (Web ADI) driven spreadsheet with download capability. Refer to the *Web Applications Desktop Integrator Implementation Guide* for details.
- **Oracle XML Publisher:** Used for the printing of sales coach and account plan output. Refer to the *XML Publisher User Guide* for details.
- **Oracle Sales for Handhelds:** Provides e-mail interactions for customers that are organizations and also for contacts. Refer to the *Oracle Sales for Handhelds Implementation Guide* for details.

Oracle Sales Optional Integrations

You can integrate Oracle Sales with Pumatech's Intellisync, a third-party application. This application is a desktop tool for synchronizing the calendar with external calendar applications such as Outlook.

Implementation Overview

This chapter covers the following topics:

- Implementation Task Sequence

Implementation Task Sequence

Oracle recommends that you implement Oracle Sales features in the order listed. Table 3-1, page 3-1 lists the steps.

Table 3-1 Oracle Sales Implementation

| Mandatory | Description |
|-----------|--|
| Yes | Setting Up Users and Reporting Hierarchy, page 4-2 Setting Up a Group, page 4-4 Verify Group Setup, page 4-6 Setting Up Manager Roles, page 4-6 Creating a Resource, and Assigning Roles and Resource Groups, page 4-7 Setting Up Employees as FND Users and Assigning Responsibilities, page 4-3 |
| No | Setting Up Sales Admin Role, page 4-6 |
| Yes | Setting Up Product Hierarchies, page 4-8 |
| Yes | Setting Up Data Quality Management in the Trading Community Architecture, page 4-8 |

| Mandatory | Description |
|------------------|---|
| Yes | Setting Up Preferred Currency, page 4-9 |
| Yes | Setting Up and Enabling Currency Conversion, page 4-9 Setting Up Currency Codes, page 4-10 Setting Up the Accounting Calendar, page 4-10 Setting Up Calendar Types, page 4-10 Setting Up Period Type Mapping, page 4-10 Setting Profile Options for Multiple Currency, page 4-11 Setting Up Reporting Currencies, page 4-11 Setting Up Quarters as a Time Period in the General Ledger, page 4-12 Entering GL Daily Conversion Rates, page 4-12 Running Concurrent Programs to Set Up Pseudo Period Rates, page 4-12 |
| Yes | Setting Up Leads Management, page 4-13 |
| Yes | Setting Up the Lead Rules Engines, page 4-14 |
| Yes | Creating Win Probabilities, page 4-15 |
| Yes | Setting Up Notes, Tasks, and Calendar, page 4-31 |
| Yes | Enabling Multi-Organization Access, page 4-32 |
| No | Setting Up Sales Stages, page 4-15 |
| No | Setting Up Sales Coaches (Sales Supplements), page 4-15 |
| No | Setting Up Sales Methodologies, page 4-16 |
| Yes | Creating and Modifying Status Codes, page 4-16 |
| Yes | Setting Up Forecast Categories, page 4-17 |
| Yes | Setting Up Forecast Category Mappings, page 4-17 |
| Yes | Setting the Defaults for Forecast Amounts, page 4-17 |

| Mandatory | Description |
|------------------|--|
| Yes | Setting Up Daily Business Intelligence, page 4-19 Mandatory DBI Setups, page 4-19 Optional DBI Setups, page 4-19 |
| No | Importing Leads, page 4-19 |
| No | Setting Up Dashboard Tables, page 4-20 |
| Yes | Defining the Sales Funnel, page 4-20 |
| No | Setting Up Security, page 4-22 |
| Yes | Setting Up Time Zones, page 4-26 |
| No | Setting Up the Territory Assignment Program, page 4-27 |
| No | Setting Up Marketing Source Codes, page 4-27 |
| No | Setting Up Sales Campaigns, page 4-27 |
| No | Setting Up Competitor Information, page 4-29 |
| No | Setting Up Quoting, page 4-29 |
| No | Setting Up Proposals, page 4-29 |
| No | Setting Up Projects, page 4-30 |
| No | Setting Up Partners, page 4-30 |
| No | Setting Up Incentive Compensation, page 4-30 |
| No | Setting Up Attachments, page 4-31 |
| No | Setting Up Customer Classifications, page 4-32 |
| No | Setting Up Web ADI to Enable Forecast Opportunity Export, page 4-33 |
| No | Implementing Oracle Sales Opportunity Transaction Reports, page 4-34 |

| Mandatory | Description |
|------------------|---|
| No | Setting Up Account Plans, page 4-35 |
| No | Setting Up Strategic Information, page 4-37 |
| No | Setting Up Opportunity History Tracking, page 4-37 |
| No | Defining Descriptive Flexfields, page 4-39 |
| No | Setting Up Lead and Opportunity Searches, page 4-40 |
| No | Personalizing the User Interface, page 4-41 |

Implementation Tasks for Oracle Sales

This chapter covers the following topics:

- Setting Up Users and Reporting Hierarchy
- Setting Up Product Hierarchies
- Setting Up Data Quality Management in Trading Community Architecture
- Enabling Address Validation
- Setting Up Preferred Currency
- Setting Up and Enabling Currency Conversion
- Setting Up Leads Management in Marketing
- Setting Up the Lead Rules Engines
- Creating Win Probabilities
- Setting Up Sales Stages
- Setting Up Sales Coaches (Sales Supplements)
- Setting Up Sales Methodologies
- Creating and Modifying Status Codes
- Setting Up Forecast Categories
- Setting Up Forecast Category Mappings
- Setting the Defaults for Forecast Amounts
- Setting Up Daily Business Intelligence
- Importing Leads
- Setting Up Dashboard Tables - Leads by Age and Cross-Sell/Up-Sell Campaigns
- Defining the Sales Funnel
- About Sales Security
- Setting Up Time Zones

- Setting Up the Territory Assignment Program (TAP)
- Setting Up Marketing Source Codes
- Setting Up Sales Campaigns
- Setting Up Competitor Information
- Setting Up Quoting
- Setting Up Proposals
- Setting Up Projects
- Setting Up Partners
- Setting Up Incentive Compensation
- Setting Up Attachments
- Setting Up Notes, Tasks, and Calendar
- Setting Up Customer Classifications
- Enabling Multi-Organization Access
- Setting Up Web ADI to Enable Forecast Opportunity Export
- Implementing Oracle Sales Opportunity Transaction Reports
- Setting Up Account Plans
- Setting Up Strategic Information
- Setting Up Opportunity History Tracking
- Defining Descriptive Flexfields
- Setting Up Lead and Opportunity Searches
- Personalizing the User Interface

Setting Up Users and Reporting Hierarchy

To access Oracle Sales, users must be set up as valid resources. Resources are then assigned responsibilities and roles within a group. Setting the security profile options for a resource determines what customers, leads, and opportunities the resource can access and the level of access.

Perform the procedures in the following list to create users and assign them roles and responsibilities:

- Creating an Employee User, page 4-3
- Setting Up Employees as FND Users and Assigning Responsibilities, page 4-3
- Setting Up a Group, page 4-4

- Verify Group Setup, page 4-6
- Setting Up Manager Roles, page 4-6
- Setting Up the Sales Admin Role, page 4-6
- Creating a Resource and Assigning Roles and Resource Groups, page 4-7

Creating an Employee User

You must first create a user of type employee. You must create an employee user for each resource in the resource hierarchy.

Notes

- Login to Oracle Forms with the US Super HRMS Manager responsibility.
- Navigate to People >Enter and Maintain.
- Action
Select Create Employee
- Person Type of Action
Select Employee.

Please refer the *Oracle HRMS Enterprise and Workforce Management Guide (Global)* for more details on creating an employee.

Setting Up Employees as FND Users and Assigning Responsibilities

You must set up employees as users and assign them certain responsibilities to access Oracle Sales.

Responsibilities determine the user's access to application functions and data. For more information, refer to the *Oracle Applications System Administrator's Guide*.

Prerequisites

The person must be set up as an employee in Oracle Human Resources. Refer to *Managing Your Workforce Using HRMS (US)* for more information on setting up employees.

Log in to Self Service applications with the System Administrator responsibility. Navigate to Security > User > Define.

Steps

1. Follow the steps for creating a user listed in the *Oracle Applications System Administrator's Guide - Security*.

2. Assign one or more of the seeded responsibilities or any customized responsibilities. For example, you should assign a sales representative with the Sales User responsibility, a sales manager or sales admin with the Sales Manager responsibility, and a system administrator with both the Sales Administrator and the Oracle Sales Administrator responsibilities.

The Sales Administrator responsibility differs from the Sales Admin role. Sales Admin is a special role for someone designated to act for the sales manager in a group, not a system administrator.

Refer to Seeded Roles and Responsibilities, page D-1 for details on seeded responsibilities.

Setting Up a Group

Oracle Sales security uses groups to determine the resource hierarchy. The manager in a group is considered the manager of all resources in child groups.

Note: Each sales group can have only one manager. Additionally, the manager role must be active in the roles table in Resource Manager.

A resource can belong to multiple groups. Only one resource with a manager role should be in each group. If you are defining group hierarchies, set up the Parent group first.

Log in to Self Service applications with the CRM Resource Manager responsibility. Navigate to Resources Manager > Maintain Resources > Groups.

Set up a group and select Sales and TeleSales from the Role Type list of values.

Note: A Sales Representative or a Sales Manager user cannot have multiple roles of type 'Sales and Telesales'.

See the *Oracle Trading Community Architecture Administrator's Guide* for details on Resource Manager.

Changes in Resource Hierarchy

If groups change within your existing resource hierarchy, be sure to use Move Member in the Resource Manager to move group members before taking any other action, such as providing an end date for the group. After making resource hierarchy changes, sales representatives and sales managers might have to resubmit their forecasts.

Note: Do not end date a group member role to remove the member from a group hierarchy. Always use Move Member to move a group member out of a group and into a new group.

Here are resource hierarchy change scenarios and how to manage them:

Sales Representative moves to another Sales Group

1. Move the sales representative using Move Member.
2. The previous manager must save the forecast worksheet and resubmit the forecast for the group.
3. The sales representative and the new manager must save their forecast worksheets and resubmit them.

All members of a sales group move to another Sales Group

1. Move all of the sales representatives using Move Member.

Note: The profile option OS: Move Opportunities must be set to Open in order for you to be able to use Move Member to move the sales representatives.

2. Have the previous manager save his forecast worksheet and resubmit the forecast for the group.
3. Move the sales manager using Move Member.
4. End date the sales manager role for one sales manager, and give that manager a sales representative role.
5. End date the old sales group after moving all of the members.
6. Have the sales representatives and the new manager save their forecast worksheets and resubmit their forecasts.

Sales Manager Leaves - All Sales Representatives Move to a New Manager

1. Move the sales representatives to the new manager's group using Move Member.
2. End date the previous manager.
3. Add the new manager to the old sales group.
4. Have the new manager save the forecast worksheet and submit a forecast for the old sales group.
5. End date the old sales group.
6. Have the sales representatives save their forecast worksheets and resubmit their forecasts.

7. Have the sales manager save his forecast worksheet and submit a forecast for his new group.

Verifying Group Setup

To verify that you have set up your groups correctly:

Log in to Self Service applications with the CRM Resource Manager responsibility.
 Navigate to Resource Manager > Maintain Resources > Group Hierarchy.

Setting Up Manager Roles

Oracle Sales security uses roles to determine which resources are managers. A manager must have an active role, of any role type, with the Manager flag checked. In addition, a manager must have the appropriate role in the context of a group.

Note: To perform forecast, a user must have the role type of Sales.

A manager's access level to leads, opportunities, and customers depends on the security profile options. Refer to Setting Up Security, page 4-22 and Security Profile Options, page A-23 for more information.

Table 4-1 lists examples of users, roles, roles attributes, and role types.

Table 4-1 Role Type Example

| User | Role | Role Attribute | Role Type |
|----------------|------------------------|----------------|-----------|
| Bob Jones | Regional Sales Manager | Manager | Sales |
| Jane Adams | District Sales Manager | Manager | Sales |
| John Franklin | Sales Agent | Member | Sales |
| Jennifer Moore | Sales Agent | Member | Sales |

Setting Up the Sales Admin Role

The Sales Admin role enables a sales group member (such as an administrative assistant, or other support team member) to have access to all leads, opportunities, customers, and contacts to which the manager of the sales group has access. A user with this role can act for the sales manager when necessary.

The level of access for the Sales Admin is based on the settings of the ASN: Sales Admin Update Access and the ASN: Sales Admin Forecast Update Access profiles.

- ASN: Sales Admin Update Access

Set this profile to Yes to provide create and update access to the lead, opportunity, and customer data.

- ASN: Sales Admin Forecast Update Access

Set this profile to Yes to enable the Sales Admin to create, update, or submit a forecast for the sales manager. Note that even with this profile set to Yes, the Sales Admin will not be able edit the sales manager's owned opportunities on the Forecast page. The Sales Admin can edit the opportunities only when the ASN: Sales Admin Update Access profile is set to Yes.

You can specify that a sales group member is the Sales Admin by setting the role attribute for that user to Admin=Yes. Sales Admin is not a seeded role. If you want to restrict the role of Sales Admin (for example, removing business object creation capacity) you can do this through personalization.

A user acting as Sales Admin must log in using the Sales Manager responsibility.

Creating a Resource, and Assigning Roles and Resource Groups

All Oracle Sales users must be set up as valid resources in Oracle Resource Manager. Users who are not valid resources cannot log in to Oracle Sales. To set up users, use the CRM Resource Manager responsibility. See the *Oracle Trading Community Architecture Administrator's Guide* for details on Resource Manager.

When you create a resource, you assign roles to the resource. To belong to a sales group a user should be a member of the sales group and have at least one active role of any role type.

- To perform forecast, a user must have the role type of Sales.
- A Sales Representative or a Sales Manager user cannot have multiple roles of type 'Sales and Telesales'.

You can create a resource either by entering the user information into Resource Manager or by importing an employee from Oracle Human Resources into Resource Manager.

Log in to Self Service applications with the CRM Resource Manager responsibility. Navigate to Maintain Resources > Import Resources.

Setting Up Product Hierarchies

Oracle Sales uses a product catalog common to all applications across the Oracle eBusiness Suite. Within the product catalog, administrators must create a product catalog hierarchy, assigning first level catalog categories as components. Within each component, the administrator assigns categories and items.

For information on creating product catalog hierarchies, refer to the *Advanced Product Catalog User's Guide*.

For information on the guidelines for using product hierarchies with forecasting, see Product Hierarchies and Forecasting, page F-1.

Setting Up Data Quality Management in Trading Community Architecture

Data Quality Management (DQM) minimizes the creation of duplicate parties. The match rules that are set for the following profile options determine the search criteria available to users:

- HZ: Match Rule for Contact Simple Search
- HZ: Match Rule for Contact Advanced Search
- HZ: Match Rule for Organization Advanced Search
- HZ: Match Rule for Person Advanced Search
- HZ: Match Rule for Organization Simple Search
- HZ: Match Rule for Person Simple Search
- HZ: Match Rule for Organization Duplicate Prevention
- HZ: Match Rule for Person Duplicate Prevention
- HZ: Match Rule for Contact Duplicate Prevention

You can change the profile option setting to a different match rule, or modify the currently-set match rule.

The match rules associated with these profile options determine which records trigger an interruption to the create flow for organizations, contacts or persons. The user is warned that the new record resembles one or more existing records and is given the option to select one of the presented existing records instead, if applicable.

Setting Up DQM for customer searches includes administrative tasks such as running concurrent programs and setting up the DQM synchronization method to keep the staging schema up-to-date. See the *Oracle Trading Community Architecture Administration*

Guide for more information.

Enabling Address Validation

When an address is created or updated through Oracle Sales, the address is validated. Similarly, the address is validated when selecting a customer or contact address from an opportunity or a lead details page.

To enable address validation, log in to Oracle Forms with the Trading Community Manager responsibility.

Navigate to the Geographic Setup form from Trading Community > Administration > Geography Hierarchy.

Address validation is determined by country level setup done through Geography Setup UI. New application level profile is also available that will override country level settings. For more information, please refer the Setting Up Real-Time Address Validation section in the *Oracle Trading Community Architecture Administration Guide*.

Setting Up Preferred Currency

You must set up a preferred currency for Oracle Sales. Oracle Sales uses this default currency for the Sales Dashboard, lead, opportunity, and forecast amounts. To set up your preferred currency, set the profile option ICX: Preferred Currency. Users can set this profile at the User level to specify their own preference.

After setting up your preferred currency, you must set up and enable currency conversions. Refer to Setting Up and Enabling Currency Conversion, page 4-9 for more information.

Setting Up and Enabling Currency Conversion

You must enable currency conversions to allow users to create opportunities, account plans, and forecasts in the necessary currency, and amounts can be displayed correctly on the Sales Dashboard.

Note: Pseudo rates are currency conversion rates used for a specific period. While daily rates can fluctuate, pseudo rates maintain one conversion rate for the entire period.

Use the following topics to enable currency conversions:

- Setting Up Currency Codes, page 4-10
- Setting Up the Accounting Calendar, page 4-10
- Setting Up Calendar Types, page 4-10

- Setting Up Period Type Mapping, page 4-10
- Setting Up Profile Options for Multiple Currency, page 4-11
- Setting Up Reporting Currencies, page 4-11
- Setting Up Quarters as a Time Period in the General Ledger, page 4-12
- Entering GL Daily Conversion Rates, page 4-12
- Running Concurrent Programs to Set Up Pseudo Period Rates, page 4-12

Setting Up Currency Codes

To set up currency codes:

Log in to Self Service applications with the System Administrator responsibility.
Navigate to Application > Currency.

Refer to the *Oracle General Ledger User Guide* for information on setting up currency codes.

Setting Up the Accounting Calendar

To set up the accounting calendar:

Log in to Self Service applications with the General Ledger Super User responsibility.
Navigate to General Ledger > Setup > Financials > Calendars > Accounting.

For information on setting up the accounting calendar, refer to the *Oracle General Ledger User Guide*.

Setting Up Calendar Types

To set up calendar types:

Log in to Self Service applications with the General Ledger Super User responsibility.
Navigate to General Ledger > Setup > Financials > Calendars > Types.

For information on setting up calendar types, refer to the *Oracle General Ledger User Guide*.

Setting Up Period Type Mapping

To set up type mapping for period types for which pseudo period rates can be set:

Steps

1. Log in to Oracle Sales with the Sales Administrator responsibility.

2. Navigate to Globalization > Type Mapping.
3. Select the same calendar you designated in the profile option OS: Forecast Calendar.
4. In the first blank Period Type field, select a period type for which you want to set the conversion rates.
5. Select the Conversion Type.
6. Enter a description.
7. Select the *Updateable* and *Deletable* boxes if you want to enable the currency conversion rates to be changed in the Pseudo Period Rates window.

Setting Profile Options for Multiple Currency

Certain profile options are required for multiple currency.

Log in to Self Service applications with the System Administrator responsibility.
Navigate to Profiles > System.

Set the following profile options:

- OS: Date Mapping Type
- OS: Forecast Calendar
- OS: Maximum Roll Days for Converting Amount

Refer to Profile Options, page A-1 for more information on the profile options required for multiple currency.

Setting Up Reporting Currencies

Currency conversions in sales applications are based on reporting currency setups.

Note: When selecting values for the REPORTING_CURRENCY lookup, you must select all FND currencies that you are currently using in the application.

Log in to Self Service applications with the Oracle Sales Administrator responsibility.
Navigate to Oracle Sales Setup > Lookup Codes > Sales.

Steps

1. Query for the Lookup Type REPORTING_CURRENCY.
2. Enter additional currency codes that you want available when a user is creating an

opportunity.

3. Enter the effective dates.
4. Select the **Enabled** check box.
5. Save your work.

Setting Up Quarters as a Time Period in the General Ledger

To make Close Date Quarter available for lead and opportunity searches and forecasting, you must set up Quarter as a time period in the General Ledger. See the *General Ledger User Guide* for details.

Entering GL Daily Conversion Rates

To search for and enter GL daily conversion rates:

Log in to Self Service applications with the General Ledger Super User responsibility. Navigate to General Ledger > Setup > Currencies > Rates > Daily.

For information on entering GL daily conversion rates, refer to the *Oracle General Ledger User Guide*.

Running Concurrent Programs to Set Up Pseudo Period Rates

To forecast in multiple currencies, you must enter pseudo period rates for periods by running two concurrent programs.

Before running the concurrent programs, ensure that you have completed the following set ups:

- Setting Up Period Type Mapping, page 4-10
- Setting Profile Options for Multiple Currency, page 4-11
- Setting Up Reporting Currencies, page 4-11
- Entering GL Daily Conversion Rate, page 4-12

Defining Currency Rates for Periods

Optionally, you can search for and edit the pseudo period rate. It is a good practice to check the pseudo period rates through a search for the rates before you run the concurrent programs.

Log in to Self Service applications with the Sales Administrator responsibility. Navigate to Administration > Globalization > Period Rate.

To search for existing pseudo period rates before running the concurrent programs:

1. Select a calendar.
2. Enter the full or partial name of the period name, using % as a wildcard, and click **Go**.
3. Select the period name and click **Select**.
4. Select Start or End date from the Mapping Date radio buttons.
5. Click **Search**.

To edit a pseudo period rate (optional):

1. Select the Period Name.
2. Select the currency to convert From.
3. Select the currency to convert To.
The Conversion Type is automatically populated based on the Period Name list of values.
4. Enter a rate.
5. The *Updateable* and *Deletable* boxes display if the pseudo period rates can be changed. If you must change the status of these boxes, click the Type Mapping link.
6. Click **Update**.

Mandatory Step: Run the following concurrent programs to set up the pseudo period rates:

- Refresh AS_PERIOD_DAYS table
- Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)
- Refresh AS_SALES_CREDITS_DENORM in complete or partial refresh mode.

For detailed information on running concurrent programs, refer to the *Oracle Applications System Administrator's Guide - Maintenance*.

Setting Up Leads Management in Marketing

Leads Management is an Oracle Marketing module that enables users to capture, evaluate, and distribute leads for follow up. Leads help to identify a customer's level of interest by tracking customer and contact information, product interest information, and ranking information. The Oracle Leads Management Rules Engine evaluates the quality and priority of leads, and then routes leads based on business workflow and best practices.

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

Setting Up the Lead Rules Engines

In Oracle Sales, leads are ranked to indicate their likelihood of converting to opportunities. For example, a hot lead might be ranked *A*, whereas a cold lead is ranked *D*.

To use the lead ranking functionality in Oracle Sales, you must set up and enable the Lead Rules Engine in Oracle Leads Management. The Lead Rules Engine does the following:

- Determines whether there is sufficient interest
- Grades leads
- Determines the sales channel for the lead, if it is not specified

For information on implementing the Lead Rules Engine, refer to the *Oracle Leads Management Implementation and Administration Guide*.

Note: The Lead Rules Engine provides functionality to automatically route a lead to Oracle Marketing. Oracle Sales does not support this functionality.

Additionally, you must set the following profile options:

- OS: Default Qualified Flag for Lead Qualification Engine
- OS: Enable Rule Engine Log
- OS: Execute customer code from lead import
- OS: Escalation Manager for Leads
- OS: Run Lead Monitor Engine
- OS: Maximum Reroutes per leads
- OS: Lead View scorecard data
- OS: Default Channel for Lead Channel Selection Engine
- OS: Default Rating for Lead Rating Engine
- OS: Default Resource ID used for Sales Lead Assignment

- PV: Run lead duplication rule

Creating Win Probabilities

Win probabilities represent the likelihood of an opportunity closing. You can use predefined win probabilities or define your own.

To create new win probabilities:

Notes

- Log in to Oracle Sales using the Sales Administrator responsibility.
- Navigate to Opportunity > Win Probability.
- Enter a value for the win probability. The Win Probability can be any number between 0 and 100. Earlier numbers represent weak opportunities, and higher numbers represent opportunities that are more likely to close. Enter a meaning and a start date. The To date determines when the win probability is invalid.
- If you want to remove a win probability, you can end date it or use the enable flag. Click **Update** when complete.

Setting Up Sales Stages

Sales stages represent the state of an opportunity or lead in the sales cycle. You can choose to use predefined sales stages or create your own.

To create a new sales stage:

Notes

- Log in to Oracle Sales with the Sales Administrator responsibility.
- Navigate to Opportunities > Sales Stage

Setting Up Sales Coaches (Sales Supplements)

Sales Coaches are created by setting up Sales Supplements in Oracle Quoting.

Note: When you create sales supplement templates to use as sales coaches, you must ensure that the templates are created for the application Oracle Sales by selecting the value Oracle Sales - Sales Coach from the Application menu.

After sales stages are defined, you can define a sales coach, or multiple sales coaches, for each stage. The sales coach:

- Provides text instructions on how the step must be accomplished
- Helps the sales representative capture important information about the lead or opportunity

For details on setting up sales supplements, see the *Oracle Quoting Implementation Guide*.

Setting Up Sales Methodologies

Sales Methodologies are used to capture essential information throughout the sales cycle of leads and opportunities.

To set up a sales methodology:

Notes

- Log in to Oracle Sales with the Sales Administrator responsibility.
- Navigate to Opportunities > Sales Methodology

Creating and Modifying Status Codes

Status codes are used to determine the status of a lead or opportunity.

Note: In order for an opportunity to be included in a forecast, the status code must be an Opportunity status and must be Forecastable. You cannot modify the Status Code name after you create the status code.

To create new status codes:

Notes

- Log in to Oracle Sales with the Sales Administrator responsibility.
- Navigate to Opportunities > Status Code
- Click Create to create a status code.
- Select the Enabled check box to enable the status code.
- Select the Open check box to signify that the lead/opportunity is open. If this box is not checked, a lead/opportunity having this status will be closed and the application will require a Close Reason to be specified for the lead/opportunity.
- Select the Include in Forecast check box if you want opportunities that have this status to be included in the forecast.
- Choose to apply this status to Opportunity, Sales Lead, or both.

- Indicate whether this status shows that the deal has been Won, Lost, or Neither.

Setting Up Forecast Categories

Forecast categories enable users to designate the product or service families to be included in a forecast.

Forecast categories are comprised of product categories. Refer to Setting Up Forecast Category Mappings, page 4-17 for more information.

Opportunities are only included in forecasts if the product category on the opportunity line is mapped to the forecast category selected for the forecast.

To set up forecast categories:

Notes

- Log in to Oracle Sales with the Sales Administrator responsibility.
- Navigate to Forecast > Forecast Category
- Stop and restart the web server to display the forecast category.

Setting Up Forecast Category Mappings

Forecast category mappings group together product categories for a specific forecast category. Typically, the highest level product category is mapped to the forecast category.

To add product categories to a particular forecast category:

Notes

- Log in to Oracle Sales with the Sales Administrator responsibility.
- Navigate to Forecast > Forecast Category Mapping.

Setting the Defaults for Forecast Amounts

You can set the defaults for forecast amounts (Best, Forecast, Worst) for opportunity lines using the ASN: Forecast Defaulting Type profile option. The default for this profile option is Pipeline; the other valid value is Win Probability.

Opportunity product line forecasts default amounts are calculated using pipeline or win probability range.

If the pipeline is used to calculate forecast amounts, it is used as shown in the following table:

Pipeline and Forecast Amounts

| Status | Best | Forecast | Worst |
|-----------------------|------------------------|-----------------------------------|------------------------|
| Forecastable, Not Won | Pipeline Amount | Pipeline Amount * Win Probability | 0 |
| Forecastable, Won | Pipeline Amount | Pipeline Amount | Pipeline Amount |
| Not Forecastable | Blank and not editable | Blank and not editable | Blank and not editable |

If the win probability range is used to calculate forecast amounts, it is used as shown in the following table:

Win Probability Ranges and Forecast Amounts

| Status and Win Probability Range | Best | Forecast | Worst |
|---|------------------------|------------------------|------------------------|
| Forecastable, Not Won, Win Probability < 40% | 0 | 0 | 0 |
| Forecastable, Not Won, 40% <= Win Probability < 60% | Pipeline Amount | 0 | 0 |
| Forecastable, Not Won, 60% <= Win Probability < 80% | Pipeline Amount | Pipeline Amount | 0 |
| Forecastable, Not Won, 80% <= Win Probability | Pipeline Amount | Pipeline Amount | Pipeline Amount |
| Forecastable, Won, Win Probability is not applicable in this case | Pipeline Amount | Pipeline Amount | Pipeline Amount |
| Not Forecastable, Win Probability is not applicable in this case | Blank and not editable | Blank and not editable | Blank and not editable |

Any manual updates that you make to the Best, Forecast, and Worst amounts will override the values that result from any defaulting that has been set for your organization.

Setting Up Daily Business Intelligence

Oracle Daily Business Intelligence (DBI) is a reporting framework that enables managers to see information on their employees' sales activities.

- Mandatory DBI Steps, page 4-19
- Optional DBI Steps, page 4-19

Mandatory DBI Setups

Oracle Sales requires that you implement Daily Business Intelligence (DBI) for Sales. DBI for Sales is a mandatory entry point for sales managers and Sales Admins using Oracle Sales.

For information on implementing DBI for Sales, refer to the *Daily Business Intelligence for Sales* chapter of the *Oracle Daily Business Intelligence Implementation Guide*.

Optional DBI Setups

Optionally, you can also implement the following DBI areas:

- Service Intelligence - for Service Summary region
- Service Contracts Intelligence, Supply Chain - for the Top Customers bin and the Products Under Contract bin

Also, if your users are creating Account Plans, you must set the DBI profile option BIS: Primary Currency (Site level) to enable currency conversions for the revenue amount to display in the Revenue Objectives for account plans.

You can enable these DBI areas through personalization:

- Top Customers bin on the Dashboard
- Products Under Contract bin on the Update Opportunity, Update Lead, and View/Update Customer pages
- Service Summary region on the Update Opportunity and Update Lead pages

Importing Leads

You can import leads using the Oracle Leads Management concurrent program *Import*

Sales Leads. The program also imports customers, contacts, and addresses into the Trading Community Architecture tables, if the data does not already exist.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for information on importing leads.

Setting Up Dashboard Tables - Leads by Age and Cross-Sell/Up-Sell Campaigns

You can improve application performance by restricting the number of leads displayed in the Leads by Age table in the Dashboard page. You can do so by specifying a shorter historical period in the system profile ASN: Sales Dashboard Leads Aging Bin Period (Days). By default, this system profile is set to 90 days.

Note: If you set the profile to 31 days or less, you may want to hide the column in the table which displays leads older than one month

The Cross-Sell/Up-Sell Sales Campaigns table is controlled by the ASN: Sales Dashboard Sales Campaign Bin Period (Days) profile option. This profile option determines the age of the sales campaign's leads and opportunities that are displayed in this table. The default value for this profile option is 90. You can modify this value to meet your business needs. You can consider the average length of time between lead generation, conversion to opportunity, and opportunity closure when defining this profile option. Make sure you provide enough time for the sales cycle to complete for your sales campaigns before they are omitted from the table.

Defining the Sales Funnel

The sales funnel displayed on the Sales Dashboard is divided into four sections that can be linked to sales stages of a sales methodology. When your users click the link in the funnel section, they see a list of opportunities that are in that particular sales stage.

The funnel graphic is limited to four sections, and if this does not meet your business needs, you can hide the funnel using personalization.

You can assign one or more sales stages to each section of the funnel graphic.

Steps

1. Determine whether you want to assign sales stages from a single sales methodology to the funnel or if you want to assign stages from more than one methodology:

Single methodology: If there is a single methodology that you want to link to the funnel, go to the Sales Methodology Details page and look at the details for that methodology (see Setting Up Sales Methodologies for more details). Determine which individual sales stages of the methodology must be mapped to each of the four funnel sections. While on this page, note the stage sequence numbers that are

displayed for each of the sales stages you want to assign to the funnel. Be sure to write down these numbers and their associated stages. You must enter these numbers in step 3 of this process.

Multiple methodologies: If you want to link more than one sales methodology to the funnel, you can create a placeholder methodology that contains links to the multiple sales methodologies. The placeholder methodology is not a real sales methodology, but will act as a container for the sales stages that you want to link to the sections of the funnel.

To do this, go to the Create Sales Methodology page and create a new sales methodology. You do not want this methodology to be available to your users, so be sure to enter effective dates (from and to) for this placeholder methodology that are in the past. This automatically makes the new methodology inactive in the system, and your users will not see it in the list of available sale methodologies.

Now that you have created this inactive sales methodology, you must assign all of the sales stages to it that you will eventually link to the sales funnel. As you assign the sales stages to your new methodology, you must enter minimum and maximum win probability numbers for each stage. Win probability values are required; enter any value (these values do not have any impact on the sales funnel). Also, enter the stage sequence numbers for each of the sales stages assigned to the methodology. After assigning sales stages to your new methodology, note the stage sequence numbers that are displayed for each of the sales stages you want to assign to the funnel. Be sure to write down these numbers and their associated stages. You must enter these numbers in step 3 of this process.

2. Link the sales methodology from step 1 to the sales funnel. To do this, use the profile ASN: Dashboard Funnel Assigned Methodology. Users cannot have their own sales funnels with a different sales methodology since the profile is enabled only at the site level. This profile option enables you to search all sales methodologies (both active and inactive) in the system and select which methodology you want to link to the sales funnel. Search and select the sales methodology defined in step 1 and add it to the profile option. The funnel is then linked to this sales methodology.
3. Designate which stages of the methodology must be mapped to corresponding sections of the funnel. Use the lookup ASN: Dashboard Funnel Assigned Stages to accomplish this. You must be logged in using the Application Developer responsibility to access this lookup.

Enter this information into the lookup table:

- In the "Code" column of the lookup, enter the sales stage sequence numbers that you wrote down in step 1 that will be associated with a funnel section. Entered stage sequence numbers are separated by commas (for example, 5, 10, 15 would assign stages with sequence numbers 5, 10, and 15 from the designated sales methodology). You must set up four sales stages.

- In the "Meaning" column of the lookup, enter the text that will be displayed to users in each funnel section. Note that you must keep the text very short so that it will fit in the limited space in the funnel graphic.
- In the "Tag" column of the lookup, enter the section number of the funnel (this will be a value between 1 and 4 and these values cannot be changed). This will tie the sales stages and display text (described earlier) to each individual funnel section. Table 4-3 shows the contents of a completed lookup table.

Table 4-3 Lookup Codes

| Code | Meaning | Description | Tag | From | To |
|---------|----------|-------------|-----|-------------|----|
| 1, 2, 3 | Assess | | 1 | 01-Feb-2005 | |
| 4,5 | Identify | | 2 | 01-Feb-2005 | |
| 6 | Propose | | 3 | 01-Feb-2005 | |
| 7 | Close | | 4 | 01-Feb-2005 | |

The first row of the table corresponds to the first section of the funnel. In this example, the first row of the table shows the use of sales stages from multiple methodologies. The values in the Code column assign sales stages with sequence numbers 1, 2, and 3 to the first section of the sales funnel. The first section of the funnel is labeled Assess as shown in the Meaning column. The Description column is not used; ignore this column. The Tag column has a value of 1, indicating that all of the data in this row corresponds to the first section of the sales funnel. Ignore the From and To columns as they have no impact on the funnel.

Note: You must complete all of the steps described in Setting Up and Enabling Currency Conversion, page 4-9 to display data in the sales funnel.

About Sales Security

Oracle Sales security is controlled by a set of profile options that are grouped into the following categories:

- Customer Access Security

- Lead Access Security
- Opportunity Access Security
- Forecast Security

Additionally, security differs based on whether the user is a sales representative or a sales manager. Refer to Security Profile Options, page A-23 for more information on the security profile options.

Sales Team

Customers, opportunities, and leads have separate sales teams. Any valid resource can be added to these sales teams, as long as the resource is part of a sales group with the usage type Sales and TeleSales. Note that customer, opportunity, and lead sales teams are separate entities and that you cannot move one type of sales team to another type. For example, you cannot move the customer sales team to be the lead or opportunity sales team.

Additionally, the resource must have at least one active role in that group.

Sales teams are either assigned manually or using the Territory Assignment Program (TAP). The *Do Not Reassign* flag prevents TAP from reassigning sales team members. If a user is added to the sales team when creating a lead or opportunity, the *Do Not Reassign* flag is selected. The *Do Not Reassign* flag is controlled by the profile ASN: Default Value for Sales Team Do Not Reassign Flag. If the profile is not set, the flag is enabled by default. The value in the profile is used while adding a sales team to customers, leads, and opportunities. Refer to Setting Up the Territory Assignment Program (TAP), page 4-27 for more information on automatically assigning sales teams.

Note: A user-group combination can only be added to a sales team once. A user can be on the sales team multiple times, as long as each instance is for a separate group.

Owner

When a user creates a lead or opportunity, the user is automatically added to the sales team, with the *Do Not Reassign* flag selected, as the *owner*. The *Full Access* flag is automatically checked as well, unless otherwise specified.

Note: A user with access to the lead or opportunity sales teams can check or clear the Owner check box to designate if a particular resource must be the *owner* of the lead or opportunity.

Oracle Sales also supports product-level forecasting within an opportunity. This means that if multiple sales representatives have worked on an opportunity that contains multiple products, the opportunity is forecasted showing all of the product lines and the representative for each product line. As a result, multiple sales representatives can

forecast on a single opportunity. This product level forecasting can occur within a sales group, and also across multiple sales groups for the distribution of sales credits.

The type of revenue or non-revenue sales credits is based on the setting of the profile option ASN: Forecast Sales Credit Type. Refer to System Profile Options, page A-1 for more information on this profile option.

Note: On an opportunity, if the *owner* receiving revenue forecast credits is removed from the sales team, the forecast credits are passed on to the subsequent *owner*.

In opportunities, the sales team *owner* is mandatory. The Do Not Reassign Flag is automatically checked, ensuring that the owner is not removed by TAP.

Owners are optional for Leads. If an owner is not specified by the user, the *owner* is assigned using TAP.

Customer Access Security

Customer Access is controlled by the ASN: Customer Access Privilege profile. This enables users to view or update customer information for their customers. A user can only drill into customer and contact details, if that user has access to that customer. Additionally, the user can only update the customer or contact if the user has *Update* access.

- **Full:** The user has Update access for all customers
- **Sales Team:** The user has Update access to all customers for which the sales representative is on the Customer sales team with the Full Access flag selected and read-only access to all customers where the user is on the Customer sales team with the Full Access flag deselected.

Sales Manager Access Levels

Sales manager access is controlled by the ASN: Manager Update Access profile. There are three additional levels of access:

- **Update data:** Update access to all business objects where the user's subordinates are on the business object sales team
- **Inherit data:** Update access to all business objects where the user's subordinates are on the business object sales team with the Full Access flag selected and Read-only access to all business objects where the user's subordinates are on the business objects sales team with the Full Access flag deselected
- **View data:** Read-only access to all customers where the user's subordinates are on the business objects sales team

Sales Admin Access Levels

Sales Admin access is controlled by the ASN: Sales Admin Update Access profile. There

are three additional levels of access, as there are for the sales manager:

- **Update data:** Update access to all business objects where the manager's subordinates are on the business object sales team
- **Inherit data:** Update access to all business objects where the manager's subordinates are on the business object sales team with the Full Access flag selected and Read-only access to all business objects where the user's subordinates are on the business objects sales team with the Full Access flag deselected
- **View data:** Read-only access to all customers where the manager's subordinates are on the business objects sales team

The Sales Admin can have an access level that is the same as, but not higher than, that of the sales manager. When setting the ASN: Sales Admin Update Access, take into account the setting for the ASN: Manager Update Access profile. Be sure that the Sales Admin has access that is either equal to or less than that of the sales manager. Table 4-2 lists examples of relative settings of these two profiles that can result in the Sales Admin role having higher access than the sales manager.

Table 4-2 Sales Manager and Sales Admin Access Profile Settings

| Profiles | Profile Settings | Results |
|--|-------------------|--|
| ASN: Sales Admin Update Access ASN: Manager Update Access | Update View | Sales Admin has Update access, which is a higher access level than the sales manager's View access. Change the sales manager's access to Update, or change the Sales Admin's access to View. |
| ASN: Sales Admin Update Access ASN: Manager Update Access | Update Inherit | Sales Admin might have a higher level of access depending on what level inherited by the sales manager. Change the sales manager's access to Update, or change the Sales Admin's access to View. |
| ASN: Sales Admin Update Access ASN: Manager Update Access | Inherit View | Sales Admin might have a higher level of access depending on what level inherited by the sales admin. Change the sales manager's access to Update, or change the Sales Admin's access to View |

Lead Access Security

Lead access security is governed by the ASN: Lead Access Privilege profile. There are two levels of access to leads:

- **Full:** The user has Update access for all leads
- **Sales Team:** The user has Update access to all leads where the user is on the Lead sales team with the Full Access flag selected, read-only access to all leads where the user is on the Lead sales team with the Full Access flag deselected.

If the user is a sales manager, there are three additional levels of access. See Sales Manager Access Levels , page 4-24 for details. Also, there are three additional levels of access for the Sales Admin. See Sales Admin Access Levels, page 4-24 for details.

Opportunity Access Security

Opportunity access security is governed by the ASN: Opportunity Access Privilege profile. There are two levels of access to opportunities:

- **Full:** The user has Update access for all opportunities.
- **Sales Team:** The user has Update access to all opportunities for which the user is on the opportunity sales team with the Full Access flag selected and read-only access for all opportunities where the user is on the Opportunity sales team with the Full Access flag deselected.

If the user is a sales manager, there are three additional levels of access. See Sales Manager Access Levels , page 4-24 for details. Also, there are three additional levels of access for the Sales Admin. See Sales Admin Access Levels, page 4-24 for details.

Forecast Security

- **Sales Manager Access:** A sales manager can always view the subordinate's opportunities on the forecast pages. The sales manager cannot update the subordinate's opportunities in the forecast pages, unless the sales manager owns the opportunities or has update access to the opportunities as per the ASN: Manager Update Access profile setup. The sales manager can edit the opportunities by drilling down to the opportunity page.
- **Sales Admin Access:** The Sales Admin has view only access to a manager's forecast details unless the profile option ASN: Sales Admin Forecast Update Access is set to Yes. Note that even with the ASN: Sales Admin Forecast Update Access profile set to Yes, the Sales Admin will not be able edit the sales manager's owned opportunities on the Forecast page. The Sales Admin can edit the opportunities by drilling down to the opportunity page depending on the setting of the ASN: Sales Admin Update Access profile.

Setting Up Time Zones

You can define time zone information for phone number area codes for all phone numbers used in Oracle Sales. This is achieved by creating or updating area codes for a specific country in Oracle Trading Community Architecture.

Here you are using the area code to set up the time zone that is used for a lead to opportunity conversion. The profile FND: Framework Compatibility Mode is used in this conversion.

Log in to Self Service applications with the Trading Community Manager responsibility. Navigate to Trading Community > Administration > Phones.

Steps

1. Search for phone code (area code).
2. Map area code to time zone.

For complete information on setting up setting up time zone information, refer to the *Oracle Trading Community Architecture Administration User Guide*.

Note: Be sure that the profile option FND: Framework Compatibility Mode is set to ensure proper setting of time zones.

Setting Up the Territory Assignment Program (TAP)

Oracle Sales uses the Territory Assignment Program (TAP) to automatically assign sales teams to opportunities, leads, and customers based on preset rules. If you choose not to implement TAP, you can manually enter sales team members and owners.

See the *Oracle TeleSales Implementation Guide* for details on setting up TAP.

Setting Up Marketing Source Codes

Source codes are unique identifiers that indicate the source of a lead or opportunity. For example, *Campaign for Upgrades* would be the source code for a lead generated based on a marketing campaign. Users can access sales campaign details from the Source field on the Lead and Opportunity Update pages, as well as the Lead and Opportunity View pages.

You can set up additional source codes in Oracle Marketing. For more information, see the *Oracle Marketing Implementation Guide*.

Setting Up Sales Campaigns

Sales campaigns are marketing tools that help to disseminate information about a company's products, services, offers, and messages to existing and potential customers. Campaigns consist of a campaign and a campaign activity. Campaign activities indicate the start and duration of an active sales campaign. Campaign activities can be set up to repeat weekly, monthly, quarterly, or yearly. Refer to the *Oracle Marketing Implementation Guide* for more information.

Oracle Sales users can create sales campaign activities within Oracle Sales, but the roll-up campaigns referenced in these schedules are created in Oracle Marketing. The Create Campaign page enables users to create and carry out campaign activities through a variety of marketing channels. Although users can create campaign activities in Oracle Sales, administration tasks are performed within the Campaign Workbench in Oracle Marketing. To access the Campaign Workbench for administration purposes, administrators must be assigned the Campaign Workbench Super User responsibility.

Campaign activities use templates that are purpose and channel driven. The Campaign Workbench provides a seeded Sales template, which defaults into the Oracle Sales user interface.

Note: Although you can define new, sales-related campaign activity templates in the Campaign Workbench, you can only use the seeded Sales template in Oracle Sales.

Administrators can customize this template in the Campaign Workbench by:

- **Adding or changing the Activity Purpose:** The Activity purpose for the seeded sales template is hard coded to the value Cross-Sell. If you do not customize this template, the Cross-Sell activity purpose is always selected for your campaign activities
- **Selecting a Default List Template for each Activity Purpose:** Includes lists from Audience Workbench setup
- **Adding or removing components:** Determine which tabs appear and what actions users can or cannot perform

When a sales representative is creating a campaign activity, they have the option to include:

- Products
- Target Accounts
- Sales Kits

In the Target Accounts region, users can select a list template. List templates are defined in the Audience Workbench of Oracle Marketing. Lists enable users to determine the audience for a campaign.

Note: If a list template is defaulted in the Target Accounts region, the activity template has been set up with a default list template.

Administrators must be assigned the following responsibility to administer lists:

- Audience Super User

When a user is creating a campaign activity, they have the option of associating Sales Kits, also known as collaboration content, from Oracle Content Manager or Oracle Proposals. This content is set up in the respective applications, and these modules must be properly implemented for the content to be available for campaign activities. For information on setting up content in Oracle Content Manager, refer to the *Oracle Marketing Implementation Guide*. For information on setting up Proposals, refer to the *Oracle Proposals Implementation Guide*.

Setting Up Competitor Information

Within an opportunity, a sales representative can select competitor information for a product. Competitor product information is set up in Oracle Trade Management, and can be defined for a particular inventory item, for an entire category of products, or for both.

For information on setting up competitor information, refer to the *Oracle Trade Management User Guide*.

Setting Up Quoting

Oracle Sales integrates with Oracle Quoting to enable users to convert opportunities to quotes, and eventually orders. If integrated, a Create Quote button appears in the Proposals and Quotes tab in the Opportunity Details page and in the Quotes bin of the Sales Dashboard. After you click this button, you are taken to Quoting. You can also use the Quoting link in the Shortcuts bin of the Sales Dashboard to access Oracle Quoting.

Note: You can create multiple quotes from a single opportunity.

After the quote is created, you can access it through a link in Oracle Sales. The opportunity name is referenced in the quote as well.

For complete information on implementing and setting up Oracle Quoting, refer to the *Oracle Quoting Implementation Guide*.

Note: You can use personalization to disable the Create Quote selection in the Action pull down menu on the Customer Update and Contact Update pages. Also, you can disable the Create Quote button for opportunities.

Setting Up Proposals

Oracle Sales integrates with Oracle Proposals to enable users to generate proposals from leads or opportunities. With Oracle Proposals, Oracle Sales users can create and send proposals to customers, including opportunity information and customized collateral.

After the proposal is created, users can access it through a link in Oracle Sales. The opportunity name is referenced in the proposal as well.

You can create proposals or access the Proposals application from the following pages: Sales Dashboard, Lead Details, Opportunity Details, Customer Details and Contact Details.

For information on setting up Oracle Proposals, refer to the *Oracle Proposals Implementation Guide*.

Note: You can use personalization to disable the Create Proposal selection in the Action pull down menu on the Customer Update and Contact Update pages.

Setting Up Projects

Oracle Projects provides project managers with the ability to manage the schedule, resources, finances, issues, and other aspects of their projects. Oracle Sales integrates with Oracle Projects allowing project managers view projects associated with an opportunity and to capture the costs related to the pursuit of opportunities.

You must use personalization to enable the Projects table on the Proposals and Quotes Tab on the Update Opportunities page.

For information on setting up Oracle Projects, refer to the *Oracle Projects Implementation Guide*.

Setting Up Partners

Oracle Sales integrates with Oracle Partners to provide sales representatives with the capability to determine the sales channel for a lead or opportunity. Partners functionality is available through personalization and can appear on the Partners Tab and the header section on the Update Opportunity page. Partner sales team information is also displayed on the Sales Team tab on the Lead and Customer details pages.

For steps for setting up Oracle Partners to integrate with Oracle Sales, refer to the *Oracle Partner Management Implementation Guide*.

Setting Up Incentive Compensation

Oracle Sales uses the functionality of Oracle Incentive Compensation to enable users to view sales commissions, earnings statements, attainment summaries, and year to date summaries. For steps for setting up Incentive Compensation, refer to the *Oracle Incentive Compensation Implementation Guide*.

Setting Up Attachments

Oracle Sales uses the attachments functionality provided by Oracle Common Application calendar to provide users with attachments capability for opportunities, leads, customers, contacts, and forecasts. These attachments can include text, external documents and web addresses. You can provide access to attachments through personalization.

Setting Up Notes, Tasks, and Calendar

Oracle Common Applications provides a set of components that can be used by all Oracle CRM applications. Sales applications use the Oracle Common Application Calendar, Notes, and Tasks to help sales representatives manage daily activities. Implementation of these modules is optional. Refer to the *Oracle Common Application Calendar Implementation Guide* for complete setup information.

- Setting Up Notes, page 4-31
- Setting Up Tasks, page 4-31
- Setting Up Calendar, page 4-32

Through integration with Pumatech, Inc.'s IntelliSync® for Oracle, you can synchronize the Oracle Calendar and tasks with your Outlook calendars and handheld devices.

Setting Up Notes

Through integration with Notes, Oracle Sales users can enter notes regarding leads, opportunities, customers, contacts, and forecasts so that all members of the sales teams can view the latest information.

Notes are categorized into note types. You can select to use predefined note types or create your own.

For complete information on implementing and setting up Notes, refer to *Oracle Common Application Calendar Implementation Guide*.

Log in to Oracle Forms with the CRM Administrator responsibility. Navigate to Notes Setup > Note Type Setup.

Setting Up Tasks

Through integration with Tasks, users can both create and view existing tasks that are associated with leads, opportunities, customers, or contacts. Users can also create tasks on the Sales Dashboard.

Tasks are categorized into task types. You can choose to use predefined task types or create your own.

Do not perform personalization in both the task region in the Details Tab and in the Notes and Tasks tab. Perform personalization in either area, but not both. You can personalize the display of Description and Name information shown in the References table for the task.

For complete information on implementing and setting up Tasks, refer to *Oracle Common Application Calendar Implementation Guide*.

Log in to Oracle Forms with the CRM Administrator responsibility. Navigate to Task and Escalation Manager > Setup.

Setting Up Calendar

Integration with Calendar enables users to conveniently access appointments on the Sales Dashboard. The Sales Dashboard displays the full list of appointments for a given date and enables users to create new appointments by selecting a link to Oracle's calendar tool.

For complete information on implementing and setting up Calendar, refer to *Oracle Common Application Calendar Implementation Guide*.

Log in to Oracle Forms with the CRM Administrator responsibility. Navigate to Calendar > Calendar Setup.

Setting Up Customer Classifications

Responsibility

Trading Community Manager

Navigation

Trading Community > Administration > Classifications

Oracle Sales applications use the seeded general and industrial classifications that are set up in Oracle Trading Community Architecture. These classifications are based on lists of government-generated classifications for types of businesses, and are listed in the Classifications Tab on the Customer Update page. Refer to the *Oracle Trading Community Architecture Administration Guide* for details.

Note: You can create general classifications to use in addition to the provided classifications.

Enabling Multi-Organization Access

The Multi-Organization Access Control (MOAC) functionality enables users to access secure data in one or more operating units within the context of a single responsibility. Thus, users logged in under a single responsibility can perform business tasks on entities belonging to all of the operating units to which they have access. For example, a

user can add products associated with multiple operating units to the same opportunity or lead. Since product categories are not restricted by organization, users can add any product category at any level in the product category hierarchy.

Users can access multiple operating units, so there is a default operating unit that a user will work with most frequently. This default operating unit, which can be set at the user and responsibility levels is the operating unit that defaults in the user interface when a user is able to select an operating unit. It is also the operating unit that is stamped on new opportunities when they are created. To enable the stamping of opportunities with the user's default operating unit, you must set the profile option MO: Default Operating Unit and MO: Security profile to valid values. This profile option setting is mandatory. Stamping the user's new opportunity with the default operating unit does not limit user access to the opportunity and the operating unit stamp is not exposed to the user.

Note: If you are not implementing multiple organization functionality, you must set the profile option MO: Operating Unit.

See the *Oracle Applications Multiple Organizations Implementation Guide* for information on setting the profile MO: Default Operating Unit and MO: Security Profile, as well as implementation considerations for operating unit security, and other details on enabling Oracle Sales users to access multiple operating units.

Setting Up Web ADI to Enable Forecast Opportunity Export

Oracle Sales enables users to export opportunities from the Forecast page to a spreadsheet using Web ADI functionality. This enables the users to quickly download to a spreadsheet all opportunities that match the forecast parameters criteria using the Export Opportunities button.

Note: Be sure that the Web ADI profile option BNE_UIX_PHYSICAL_DIRECTORY is set to contain the path to the UIX (Cabo) libraries that are used to generate the Web ADI user interface. Also, be sure to have your users set their Internet browser security setting for "Initialize and script ActiveX controls not marked as safe" to "Prompt". Ensure that the Microsoft Excel macro security is set to Medium.

For details on the purpose of setting the ActiveX controls, refer to the *Web Applications Desktop Integrator Implementation Guide* Frequently Asked Questions for more information.

Refer to the *Oracle Web Applications Desktop Integrator Implementation Guide* for more information.

Implementing Oracle Sales Opportunity Transaction Reports

Oracle Sales provides these reports to give users access to sales transaction information:

- Opportunity Summary
- Opportunity List
- Opportunity Detail
- Opportunity Aging

Users can send these reports as e-mail to specified recipients.

To implement the opportunity reports you must:

1. Set these profile options:

Profile Options for Opportunity Reports

| Profile Name | Description | Level | Default |
|---------------------------------|---|--------------|----------------|
| ASN: Forecast Sales Credit Type | Determines the credit type used for revenue forecasting. | S | N/A |
| BIS: Base Domain Name Value | Sets the domain name (DNS) value. Enables users to e-mail Oracle Sales Reports. | S | N/A |
| BIS: Mailing LDAP Server | Sets the LDAP server name. Enables users to e-mail Oracle Sales Reports. | S | N/A |
| BIS: Mailing SMTP Server | Sets the SMTP server name. Enables users to e-mail Oracle Sales Reports. | S | N/A |

| Profile Name | Description | Level | Default |
|-----------------------------|---|-------|---------|
| CRM BIS: GL Conversion Type | Determines the currency conversion type execute for each currency conversion rate. For example, Corporate. Normally, this is set at site level. | S | N/A |
| CRM BIS: Period Set Name | Determines the period set name for currency conversion rate. For example Accounting. Normally, this is set at site level. | S | N/A |

2. Set these lookups:
 - **BIL_TX-WIN_PROB**: Used to create the operator drop-down parameter for the Win Probability parameter in Opportunity List, Opportunity Aging and Opportunity Summary reports.
 - **BIL_TX_WIN_PROB_LK**: Used to create the operator drop-down parameter for Total Amount parameter in Opportunity List report.
3. Run the concurrent program Refresh of Opportunity Status Aging Summary Table. Run this concurrent program to supply the data for the Days in Status field in the Opportunity Aging report. Oracle recommends that you run this concurrent program daily. This concurrent program is used for initial data load as well as for incremental updates.

Setting Up Account Plans

Account plans contain information about key customers and are used to maintain long-term relationships with them. An Account Plan contains Sales Supplement sections, Business Drivers and Selling Plan. All three sections are personalizable.

To set up an account plan:

1. **Create the sales supplement template for the account plan:** You can create parts of an account plan by setting up sales supplements in Oracle Quoting. The Business Drivers and Selling Plan sections of the account plan are provided by default (not

through a sales supplement template) and can be customized or personalized through Oracle Applications Framework personalizations.

Note: When you create sales supplement templates to use in an account plan, ensure that the templates are created for the application Oracle Sales – Account Planning.

Note: For details on setting up sales supplements, see the *Oracle Quoting Implementation Guide*.

- 2. Set the profile option ASN: Account Plan Sales Supplement Template:** The template accessed by your users for account plan creation is based on the setting of the profile option ASN: Account Plan Sales Supplement Template.

Oracle recommends that you set up a new customized sales supplement template based on your user's needs rather than rely on the provided Account Plan Worksheet, which is a generic template. Also, it could be undesirable to have some users with account plans created in one template, and other users with plans that were based on another template.

When you create a new template for your users, be sure to set the value for the ASN: Account Plan Sales Supplement Template profile option to that template name.

- 3. Set the profile option BIS: Primary Currency:** Set the DBI profile option BIS: Primary Currency (Site level) to enable the currency conversion for the revenue amount that displays in the Revenue Objectives section of the account plan.

For information on implementing DBI for Sales, refer to the Daily Business Intelligence for Sales chapter of the *Oracle Daily Business Intelligence Implementation Guide*.

- 4. Set up XML Publisher:** Oracle Sales enables your users to print a copy of the account plan. When the user has completed the account plan, they then select an account plan output template and click View Worksheet to generate a printable copy of the plan. The results include the account plan data and other customer information that exists in Oracle Sales.

Users can choose to generate the account plans in RTF (rich text) or PDF formats. You create account plan output templates to enable the printing of this information. The template name is displayed in the Select Template menu in the Account Plan tab. You use Oracle XML Publisher to create these templates. The ASN: Default Account Plan Document Template profile determines the XML Publisher template used to generate the worksheet for account plan and the ASN: Default Sales Document Type profile determines the default document type. See <http://xdo.us.oracle.com> and the *Oracle XML Publisher User's Guide* for more information on creating and implementing RTF and PDF templates for account plan output.

Setting Up Strategic Information

Strategic information about a customer's contact can include the degree of contact your user has with the contact, the contact's professional or personal goals, or similar information.

To set up strategic information:

1. **Create the sales supplement template for the strategic information:** You can create strategic information by setting up sales supplement templates in Oracle Quoting.

Note: When you create sales supplement templates to use for strategic information, ensure that the templates are created for the application Oracle Sales – Contact Information.

For details on setting up sales supplements, see the *Oracle Quoting Implementation Guide*.

2. **Set the profile option ASN: Contact Sales Supplement Template:** The template accessed by your users for strategic information creation is based on the setting of the profile option ASN: Contact Sales Supplement Template. Oracle recommends that you set up a new customized sales supplement template based on your user's needs rather than rely on the provided Contact Strategic Information template, which is a generic template. Also, it could be undesirable to have some users with strategic information created in one template, and other users with information that is based on another template. When you create a new template for your users, be sure to set the value for the ASN: Contact Sales Supplement Template profile option to that template name.

Setting Up Opportunity History Tracking

Oracle Sales enables users to access history for leads and opportunities. History tracking for leads is automatically enabled, and cannot be turned off. History tracking for opportunities is initialized using a concurrent program and profiles. Thereafter, the profile options can be used to turn history tracking off and on. Use personalization to make history tracking available to users (the history pages and the View History button as well).

History tracking cannot be extended after a user creates history for a lead or an opportunity. For example, if a user has retained history for 10 columns, history is available only for those columns, and the saved history cannot be changed to display more columns.

Access to history information is allowed to users who have access to lead and opportunity information.

Opportunity history tracking is shown in three tables on the Opportunity History page:

- Opportunity
- Products
- Non-Revenue

Steps

1. To enable opportunity history and make the history information tables available to the user, you must set the profiles listed in Table 4-7 as indicated.

Table 4-7 Opportunity History Tracking Profile Settings

| Profile | Setting | History Tracking Table Enabled |
|--|--|--------------------------------|
| OS: Enable Tracking Opportunity History Data | Yes | Opportunity |
| OS: Enable Tracking Purchase Line History Data | Yes | Products |
| OS: Enable Tracking Sales Credits History Data | Set both to Yes to enable product history tracking. Set both to No to disable this tracking. | |
| OS: Enable Tracking Purchase Line History Data | Yes | Non-Revenue |
| OS: Enable Tracking Sales Credits History Data | Set both to Yes to enable non-revenue history tracking. Set both to No to disable this tracking. | |

2. Set the profile OS: Time Frame for Opportunity Logs to Null.
3. Run the Initial Load of Opportunity Log Tables concurrent program

This program must be run only when you initialize history tracking. Be sure that all three of the history tracking profiles are set to Yes before running the concurrent program. After the program has run, you can use the profiles to disable selected portions of history tracking.

For detailed information on running concurrent programs, refer to the *Oracle Applications System Administrator's Guide - Maintenance*.

Defining Descriptive Flexfields

Descriptive flexfields are customizable fields on the Oracle Sales forms that enable the application developer to define additional fields as needed. A descriptive flexfield is composed of segments, each of which has a prompt and can have either a valid set of values or data entered by the user. After you have defined the flexfields, personalize the respective region to make the flexfields available in the user interface.

Oracle Sales supports these flexfields for customer-related pages:

- Application: Receivables
- Title: Party information (Customer Create and Update pages, Contact Create page)
- Title: Party site information (Customer and Contact Addresses)
- Title: Telephone number information (Customer and Contact phone, e-mail, and web sites)
- Title: Party Relationship information (Relationship Create and Update pages, Contact Update page)
- Title: Contact information (Contact Create and Update pages)

Oracle Sales supports flexfields at the following levels for both leads and opportunities:

- Application: Sales Foundation
- Title: Sales Leads
- Title: Sales Lead Lines
- Title: Sales Lead Contacts
- Title: Opportunities
- Title: Opportunity Contacts
- Title: Opportunity Lines
- Title: Accesses (The same flexfield definition (Accesses) is used for Sales Team for Lead, Opportunity, and Customer).

To ensure that flexfields carry over when a lead is converted to an opportunity, the flexfield definitions for the following must be consistent:

- Sales Leads and Opportunities
- Sales Lead Contacts and Opportunity Contacts

- Sales Lead Lines and Opportunity Lines

These flexfields are supported for account plans:

- Application: Sales Foundation
- Title: Sales Account Plan
- Title: Sales Account Plan Business Drivers
- Title: Sales Account Plan Strategic Objectives
- Title: Sales Account Plan Tracking Objectives

For information on setting up and modifying flexfields, refer to the *Oracle Applications Flexfields Guide*.

Specifying Flexfields

To specify values for flexfields:

Log in to Oracle Forms with the Application Developer responsibility. Navigate to Flexfield > Descriptive > Segments.

Steps

1. From the navigator, select **Flexfield > Descriptive > Segments**.
2. For opportunity, lead, sales team, and account plan flexfields, query for the application *Sales Foundation*, and search for the individual flexfield by title.
For customer flexfields, query for the application *Receivables* and then search.
3. Enter flexfield information as described in the *Oracle Application Developer's Guide*.
4. Set up flexfield segments and map the segments to attributes.
5. Save your work.
6. Log in to Oracle Sales as System Administrator and perform the necessary personalization to display the flexfields in the user interface.

For more information on OA Personalization, refer the *Oracle Applications Framework Personalization Guide*.

Setting Up Lead and Opportunity Searches

To improve performance, the application restricts searches that are not based on lead or opportunity number. The application enforces different search restrictions for sales representatives and sales managers.

A sales representative must enter the following information to perform a search unless the search is based on the lead or opportunity number:

- Status Category
- At least one selective search criteria

To search for opportunities, a sales manager must enter the following information (unless the search is based on opportunity number):

- Status
- Close Date Quarter information
- At least one selective search criteria

To search for leads, a sales manager must enter the following information (unless the search is based on lead number):

- Status
- Age
- At least one selective search criteria

You can personalize the selective search criteria to enforce different search restrictions based on the data pattern in your organization. By default, due to the size limitation of the simple search panel, the definition of selective search criteria is different for the simple search panel and the advanced search panel. Different selective search criteria are also defined for lead and opportunity searches by sales representatives and sales managers to address different search requirement and achieve reasonable search performances.

In addition, the user cannot perform a query with duplicate non-date or non-numeric type of search parameters, for example, a customer name.

For details on customer and contact searches, see, *Personalizing Customer and Contact Searches*, page 4-49.

Personalizing the User Interface

Using Oracle Applications Framework personalization, you can customize the Oracle Sales user interface. The ability to personalize is controlled by the profiles **Personalize Self-Service Defn** and **Disable Self-Service Personal**. To enable personalization, set the former to Yes and the latter to No.

Note: Oracle Sales pages are configurable and implemented with a flexible layout. Only if User Accessibility is set to None for the logged

in user, the page layout personalization page is supported. Otherwise, the page hierarchy personalization page with H-Grid form is displayed.

There are five levels of personalization:

- **Function:** Affects all users with a particular function
- **Localization:** Affects all end users for an industry location
- **Site:** Affects all users of the current installation
- **Organization:** Affects all users for a particular business unit (Org)
- **Responsibility:** Affects all users within a particular responsibility.

For example, you can customize the user interface in the following ways:

- Determine the number of rows displayed in an H-Grid table
- Add unique product branding, such as a logo
- Hide or show region, fields, and entire tables
- Change the order of regions and fields on a page
- Sort data in tables
- Change field labels and region headers
- Make fields mandatory
- Make fields read-only
- Totals for table columns (when available)
- Use cascading style sheets
- Define default values
- Provide tip text
- Add fields to a region

To learn more about the Oracle Applications Framework, see the guides available through the Oracle Application Framework Documentation Resources, Release 12, Oracle MetaLink Note 391554.1.

Personalizations on the Sales Dashboard Page

Top Customers Tables

The Top Customers table on the Sales Dashboard page is hidden by default. To enable the Top Customers table on the Sales Dashboard, you must add the contents corresponding to this table under the appropriate layout using the Page Layout Personalization page of the Sales Dashboard.

Leads and Opportunities Links - Shortcuts

You can use personalization to enable the Leads and Opportunities links in the Shortcuts on the Sales Dashboard.

Full List Button for Leads, Opportunities, Leads by Age, and Top Customers Tables

You can use personalization to enable the Full List button for these tables.

Order By Menu for Top Customers (Organization and Person)

The Order by dropdown menu enables the user to sort the Top Customers by the opportunity amount or the total order amount. You can use personalization to enable the Order By menu for this table. The Order By dropdown for Top Customers (Organization) and Top Customers (Person) are controlled by the ASN_TOP_CUST_ORG_ORDER_BY and ASN_TOP_CUST_PER_ORDER_BY lookups respectively. The values for these lookups are OPPTY_AMOUNT (Total Opportunity Amount) and ORDERED_AMOUNT (Total Ordered).

Personalizations for Customers (Organization) or Customers (Person)

Profile Tab - Products Under Contract

The Products Under Contract table on the Profile tab (for customers as organizations and customers as persons) is available through personalization.

Working with Customers as Organizations, Customers as Persons, or Both Types of Customers

By default, Oracle Sales displays customers that are organizations. You can use personalization to support an environment in which customers are organizations only, or in which customers are persons only, or a blended environment which includes customers that are persons as well as customers that are organizations.

Implementation of business to business, business to consumer, or blended environments depend on a combination of the setting of the profile option HZ: Default Party Type and personalizations.

To implement a business to business environment (customer as organization): This is the default setting in Oracle Sales. You do not have to change the profile option HZ: Default Party Type or perform personalizations to obtain this implementation.

To implement a business to consumer environment (customer as person):

1. Set the profile option HZ: Default Party Type to Person.
2. Perform personalizations listed in the table Personalizations for Customer as Person Only, page 4-44 as needed for your users.

To implement a blended environment, with business to business and business to consumer:

1. Set the profile option HZ: Default Party Type to determine the default of the Customer Type field on the customer search and select pages.
2. Perform personalizations listed in the table Personalizations for Customer as Person and Organization, page 4-47 as needed for your users.

Note: The profile option HZ: Default Party Type must match the personalizations for customer information, and not conflict with them. For example, do not set this profile option to Person and then disable the person information for customers.

Personalizations for Customer as Person Only on the Sales Dashboard page

| Region on the Page | Personalization to Perform |
|---------------------------|--|
| Shortcuts list | <ul style="list-style-type: none"> • Hide Contacts |
| Top Customers table | <ul style="list-style-type: none"> • Hide the Top Customers table that shows organizations • Show the table that displays top customers as persons and rename the table to Top Customers |

On the Create Lead page, hide the Primary Contact field.

On the Lead Views page:

| Region on the Page | Personalization to Perform |
|--------------------|--|
| Search | <p data-bbox="971 306 1289 333">Hide these search parameters:</p> <ul data-bbox="971 363 1317 531" style="list-style-type: none"> <li data-bbox="971 363 1317 390">• Primary Contact First Name <li data-bbox="971 432 1317 459">• Primary Contact Last Name <li data-bbox="971 501 1247 529">• Primary Contact Role |
| Leads table | <p data-bbox="971 594 1273 621">Show these fields as needed:</p> <ul data-bbox="971 646 1195 743" style="list-style-type: none"> <li data-bbox="971 646 1195 674">• Customer Phone <li data-bbox="971 716 1195 743">• Customer Email <p data-bbox="971 785 1154 812">Hide these fields:</p> <ul data-bbox="971 837 1235 1556" style="list-style-type: none"> <li data-bbox="971 837 1195 865">• Primary Contact <li data-bbox="971 907 1195 934">• Contact Job Title <li data-bbox="971 976 1175 1003">• Contact Phone <li data-bbox="971 1045 1154 1073">• Contact City <li data-bbox="971 1115 1203 1142">• Contact Province <li data-bbox="971 1184 1159 1211">• Contact State <li data-bbox="971 1253 1195 1281">• Contact Country <li data-bbox="971 1323 1235 1350">• Contact Postal Code <li data-bbox="971 1392 1170 1419">• Contact Email <li data-bbox="971 1461 1195 1488">• Contact Address <li data-bbox="971 1530 1154 1558">• Contact Role |

On the Opportunity Views page:

| Region on the Page | Personalization to Perform |
|--------------------|---|
| Search | Hide these search parameters: <ul style="list-style-type: none"> • Primary Contact First Name • Primary Contact Last Name |
| Opportunity table | Show these fields as needed: <ul style="list-style-type: none"> • Customer Phone • Customer Email Hide these fields: <ul style="list-style-type: none"> • Primary Contact • Contact Job Title • Contact Phone • Contact City • Contact Province • Contact State • Contact Country • Contact Postal Code • Contact Email • Contact Address |

On the Sales Dashboard page:

Personalizations for Customer as Person and Organization

| Region on the Page | Personalization to Perform |
|---------------------------|--|
| Shortcuts list | <ul style="list-style-type: none">• Rename Contacts to Contacts (Organization)• Rename Customers to Customers (Organization)• Enable new link named Customers (Person) directly under the link Customers (Organization) |
| Top Customers table | <ul style="list-style-type: none">• Rename the Top Customers table (which shows customers as organizations) to Top Customers (Organizations)• Enable a new table called Top Customers (Persons) below the Top Customers (Organizations) table |

On the Lead Views Search page and the Opportunity Views Search page, show the Customer Type field.

On the Simple and Advanced Search for Customers page, show the Customer Type field with both Organization and Person options.

Personalizing the Lead, Opportunity, Contact, and Customer Pages

Details Tab

Some tabs on the update pages for leads, opportunities, contacts, and customers can be combined into one Details tab. If you choose to use the Details tab to display information, use personalization to disable the tabs whose information is contained in the Details tab. Note that for customers, Account Plan and Sales Team information cannot be added to the Details tab, and for contacts, Strategic Information cannot be added to the Details tab. Tasks can be added if you move them from the Notes and Tasks tab to the Details tab.

Products Under Contract and Service Summary Tables

The table contents are hidden by default; add these contents to the desired layout using page layout personalization to make them available for lead, opportunity, and customer pages.

Lead and Opportunity History Tracking

The View History buttons on Lead and Opportunity Details pages are hidden by default; use personalization to make it available. See Setting Up Opportunity History Tracking for details.

Budget Amount for Lead

The Budget Amount for leads is hidden by default; use personalization to make it available.

Lead and Opportunity Response Channel

The Response Channel is hidden by default for both leads and opportunities; use personalization to make it available.

Projects Table - Opportunity Details

You can add the Projects table content, which is located on the Proposals and Quotes Tab on the Update Opportunity page, through page layout personalization.

Contributor in Opportunity Sales Team

Contributor information is hidden by default in Opportunity Sales Team; use personalization to make it available.

Line-Level Forecasting Support for Opportunity Products

You can use personalization to add line-level (product-level) forecasting for opportunity products. This enables the display of Revenue and Non-Revenue information in addition to the default Competitor information on the Products Tab for Opportunities.

1. Enable the View menu under the Product subtab on the opportunity details page.
2. In the FND lookup type ASN: Display Opportunity Products Additional Information, enable the lookup code FRCST_DTLS.

Personalizing Forecasting Pages

Sales Group Column for Sales Manager's Forecast

You can enable the Sales Group column in the Direct Reports Forecast detail and Opportunity Forecast detail for sales managers through personalization.

Forecast Type and Non-revenue Type Forecast Parameters

You can enable these parameters on the Forecast page to support non-revenue line-level (product-level) forecasting through personalization.

Enable Win Probability and Close Date Columns - Forecasting

You can enable these columns and summaries on the Opportunity Forecast Detail page through personalization.

Export Buttons on Forecast Page

Use personalization to enable the Export Opportunities button on the Forecast page to enable the download of multiple opportunities into a Web Applications Desktop Integrator (Web ADI) driven spreadsheet with dynamic download capability. Also, the Export button on the Opportunity Forecast Details region is enabled through personalization.

Personalizing Customer and Contact Searches

Personalization for Customer and Contact Searches

You can personalize the customer and contact search pages. To do this, modify the match rules that control which search parameters are displayed to users.

Note that only the Name and Related Organization search parameters on the contact search pages search directly on the contact record. You might also want to hide the Advanced Search button using Oracle Applications Framework personalization tools if you determine the advanced search page does not provide sufficient functionality beyond what is available on the simple search page.

Personalizing the Customer Region Search Results

In the Customer Search Result region of Oracle Sales, there are two regions, although the user sees only one table. When personalizing this page, you must ensure that the following two regions are identical, or the data presentation in the user interface is inconsistent:

- ASNSrchResultsRN
- ASNDQMSearchResultsRN

Add Do Not Call Preference for Contacts and Business to Consumer Customers

You can add a Do Not Call preference for contacts who specify that they do not want to receive telemarketing calls. There is a Restrictions column available on Contact pages that shows a flag if the contact has requested calling restrictions. This Restrictions column can be enabled on these pages:

- Business to Business Customer's Contact Update table (table has a Restrictions column that must be enabled)
- Business to Business Contact Update page (the header section has Primary Phone Number with restrictions)

Note: Contact information in the Contact Update and Business to Consumer Customer Update pages have two primary phone number items. By default, the Message Styled Text: Primary Phone is displayed without restrictions. You can personalize it to show the primary phone with restrictions by rendering the Message Layout:Primary Phone.

- Business to Business Contact Update page - Phone Number List table (table has a Restrictions column that must be enabled)
- Business to Consumer Customer Update page - Phone Number List table (table has a Restrictions column that must be enabled)
- Business to Consumer Customer Update page (header section has Primary Phone Number with restrictions)
- Business to Consumer Search and LOV page (search results table has a Restrictions column that must be enabled)
- Business to Business Contact Search and LOV page (search results table has a Restrictions column that must be enabled)
- Header section of Lead/Opportunity Details page for a Business to Consumer Phone Number
- Phone Number for Suggested Contacts and Selected contacts in Lead/Opportunity Details page
- Phone Number for Primary Contact of Business to Business customer in Lead Details section of Lead Listing Page
- Phone Number for Business to Consumer in Lead Details section of Lead Listing Page

Customer and Contact Business Activities Plug-Ins

Consultants can provide customized views of business activities for a customer or contact using a plug-in. See *Customer and Contact Business Activities*, page H-1 for details.

Note: Personalizations for phones must be done at the page level, not the region level. The same phone regions are used for business to customer and business to business environments.

Enable Contact Purposes

Contact roles are called Contact Purposes. By default, Contact Purposes is disabled in Oracle Sales. You can enable it through Oracle Personalization in the Update Contact Page. See the *Oracle Applications Framework Personalization Guide* for details on personalization.

Export Functionality Support

The Export button for the view-based leads and opportunities tables on the Sales

Dashboard and Customer/Contact searches is hidden by default; use personalization to make it available. See the Personalizing Forecasting Pages section for details on export functionality for forecasting.

Enabling Flexfields in Oracle Sales

Header-Level Flexfields Support - Lead and Opportunity

Header-Level Flexfields information is displayed under Additional Information subtab on Lead/Opportunity Details pages and is hidden by default; use personalization to make it available.

Note: Subtab related personalization, for example, changing a label or display order or hiding or showing a subtab, must be performed at both the Stack Layout and Subtab layout levels.

Header-Level Flexfields information is hidden by default on Lead and Opportunity Create pages; use personalization to make it available.

Line Level Flexfield Support for Lead and Opportunities

Line-Level Flexfields are supported for customer/lead/opportunity sales team, lead/opportunity products and contacts. Line-Level Flexfields information is hidden by default; use personalization to make it available.

To enable the line level flexfields for opportunity products:

1. Enable the View menu under the Product subtab on the opportunity details page.
2. In the FND lookup type ASN: Display Opportunity Products Additional Information, enable the lookup code ADD_INFO.

Personalizing Lead and Opportunity Searches

Administer Personalization of Views

You can create lead and opportunity saved views that are available to all users. Specifics on how to accomplish this are beyond the scope of this document. Refer the *Oracle Applications Framework Personalization Guide*.

User Personalization of Views

Oracle Sales enables users to save sets of search criteria as views. These views control the display of data in the Leads and Opportunities tables on the Sales Dashboard, and on the Lead and Opportunity view pages. Users can create personalized views or use the seeded views or the views created by the administrator. Seeded views that are provided with Oracle Sales are described in Seeded Views, page C-1.

To create a view, the user clicks Personalize in the Leads and Opportunities tables on the Sales Dashboard, or on the Lead and Opportunity view pages. The user can choose to duplicate or update an existing view, or to create a new view. Users can duplicate, but not update, seeded views. By clicking Create View, the user accesses the Create

Views page, and can enter criteria for the new view. Users can also delete or disable views.

For leads and opportunities, users can click **Save Search** to save the search criteria from simple or advanced searches as a view.

After creating, the view name populates the View menu. Note that users can create separate views for the view-enabled leads and opportunities bin on the Sales Dashboard page and for the lead and opportunity views pages. For example, if the user is on the Sales Dashboard page, and clicks the Personalize button in either the Lead or Opportunity bin, the Personalize Views page displays and all views that are created are available only on the Sales Dashboard. The same logic applies to the Views page. Views created on this page apply only to the Views page, and not to the Sales Dashboard.

Personalization of Search Parameters and Display Columns

You can personalize the search parameters that are available on the leads and opportunities search pages. The simple search panels have a seeded set of search parameters displayed by default, and there are additional parameters that are hidden when you first install Oracle Sales. Using the Oracle Applications Framework personalization tools, you can hide or display individual search parameters that are most important to your organization. The advanced search panels can also be personalized in a similar manner. You can also use the personalization tools to determine which search fields are selective fields (at least one selective field must be entered by a user before the query can be run).

Also, you can personalize the display columns that are available on the lead and opportunity search pages.

Enabling Oracle Partners and Oracle Sales Integration

The integration of Oracle Partners and Oracle Sales Integration is hidden by default. See the *Oracle Partners Management Implementation Guide* for details.

Personalizing at the Region Level

Note that for business activities regions, all the personalization must be done at the region level.

Update Lead and Opportunity Pages - Show More Details Link

On the Lead and Opportunity Update pages, there is a hide/show region (which the user sees as the Show More Details link) in the header portion of the pages that you can add so that the user can hide or show header level flexfields and also select standard header level fields. The flexfields in the hide/show region can be the same ones shown in the Additional Information tab, or can be extra fields. The standard header level fields that you choose to put in this region can be fields that the user uses infrequently.

A field can be displayed in the header region only, or in the hide/show region, but not in both regions. Also, if two fields are related to each other (for example Sales

Methodology and Stage fields), then these two fields must be displayed together in the same region.

Profile Options

This appendix covers the following topics:

- Oracle System Profile Options
- Oracle Sales Dashboard Profile Options
- Oracle Sales Forecast Profile Options
- Oracle Sales Leads and Opportunities Profile Options
- Oracle Sales Account Plan Profile Options
- Oracle Sales Security Profile Options
- Oracle CRM Foundation Profile Option
- Oracle Sales Foundation Profile Options
- Oracle Receivables Profile Option
- Oracle Trading Community Architecture Profile Options
- Multiple Organization (MO) Profile Options
- Oracle Applications Framework Profile Option
- Web ADI Profile Option

Oracle System Profile Options

This appendix provides information on the system profile options used by Oracle Sales. The procedure for setting up and changing system profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Note: Profile options with an asterisk are mandatory. Profile options with a double asterisk are conditionally mandatory.

Oracle Sales Dashboard Profile Options

Table Sales Dashboard Profile Options , page A-2 lists by name and in alphabetical order the profiles that apply to the Sales Dashboard.

Table A-1 Sales Dashboard Profile Options

| Profile Name | Description | Level | Default |
|--|--|-------|---------|
| ASN: Currency Conversion Period Type | Determines the pseudo period rate for the current period belonging to this period type that is used for currency conversion for the Sales Funnel in the Sales Dashboard. You must set ASN: Forecast Calendar before setting this profile option. | SARU | N/A |
| ASN: Dashboard Funnel Assigned Methodology | Determines the ability to search all sales methodologies (active and inactive) in Oracle Sales and select which methodology to link to the sales funnel. | S | N/A |
| ASN: Default Lead Status | Determines the status for newly-created leads unless otherwise specified by the user. Available values include statuses set up with the applicability "Lead" selected and the Open flag selected. | SARU | N/A |

| Profile Name | Description | Level | Default |
|---|---|-------|---------|
| ASN: Sales Dashboard Leads Aging Bin Period (Days) | Determines the amount of past time that Oracle Sales uses to make calculations of the number of older leads. This profile controls the leads that are displayed in the Leads by Age table on the Sales Dashboard. | SAR | 90 |
| ASN: Sales Dashboard Sales Campaign Bin Period (Days) | Determines the age of sales campaigns that are displayed in the Cross-Sell/Up-Sell Sales Campaigns table on the Sales Dashboard. | SAR | 90 |

Oracle Sales Forecast Profile Options

Table Forecast Profile Options , page A-3 lists by name and in alphabetical order the profiles that apply to the forecasting.

Table A-2 Forecast Profile Options

| Profile Name | Description | Level | Default |
|--------------------------------|--|-------|---------|
| ASN: Default Forecast Category | Determines the default forecast category on the forecast screen. The default value for this profile can be set by the user through the Sales Default Preferences. | SARU | N/A |

| Profile Name | Description | Level | Default |
|--|---|--------------|---|
| ASN: Default Forecast Period Type | <p>Determines the default period type on the forecast screen. You must set the ASN: Forecast Calendar profile before setting this profile option.</p> <p>The default value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | N/A |
| ASN: Default Non-Revenue Credit Type | <p>Determines the default credit type used in the non-revenue table for non-revenue forecasting.</p> <p>The default values for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | Values are based on Sales Credit types defined in Order Management. |
| ASN: Default value for maximum number of opportunities displayed for forecasting purpose | <p>The default number of opportunities to display in the Opportunity Worksheet Detail.</p> | SU | N/A |

| Profile Name | Description | Level | Default |
|-------------------------------|--|-------|----------|
| ASN: Forecast Calendar | <p>Determines the GL Calendar from which period types and periods are selected.</p> <p>Note: You must set this profile before setting ASN: Default Forecast Period Type and ASN: Currency Conversion Period Type. This value must be the same value as for OS: Forecast Calendar.</p> | S | N/A |
| ASN: Forecast Calendar Month | <p>Determines the number of periods that are displayed in the forecast parameter Period menu.</p> | S | N/A |
| ASN: Forecast Defaulting Type | <p>Determines the defaulting logic for forecast values in the opportunity. Valid values are Pipeline and Win Probability.</p> <p>See Set the Defaults for Forecast Amounts, page 4-17 for more details.</p> | S | Pipeline |

| Profile Name | Description | Level | Default |
|---|--|-------|---------|
| ASN: Forecast Display Decimal | <p>Determines whether the amounts shown in forecasts on the forecast pages and the forecast information on the Sales Dashboard contain decimal places.</p> <p>Set this profile to Yes to enable the display of decimal increments in forecast data.</p> <p>The user-level value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | No |
| ASN: Forecast Sales Credit Type | Determines the credit type used for revenue forecasting. | S | N/A |
| ASN: Internal Opportunity Filter for Win Probability From | Determines the minimum win probability for the opportunities that can be displayed in the Opportunity Forecast Detail | U | N/A |
| ASN: Internal Opportunity Filter for Win Probability To | Determines the maximum win probability for the opportunities that can be displayed in the Opportunity Forecast Detail | U | N/A |
| ASN: Internal Opportunity Filter for Status Code | Determines the status of the opportunities that can be displayed in the Opportunity Forecast Detail | U | N/A |

| Profile Name | Description | Level | Default |
|---|---|--------------|----------------|
| ASN: Internal Opportunity Filter for Pipeline Amount From | Determines the minimum pipeline amount for the opportunities that can be displayed in the Opportunity Forecast Detail | U | N/A |
| ASN: Internal Opportunity Filter for Pipeline Amount To | Determines the maximum pipeline amount for the opportunities that can be displayed in the Opportunity Forecast Detail | U | N/A |
| ASN: Internal Opportunity Filter for Channel Code | Determines the channel code for the opportunities that can be displayed in the Opportunity Forecast Detail | U | N/A |
| OS: Forecast Calendar | Determines the name of the calendar you are using to manage your forecasts. The value of this profile option should be the same as that for the ASN: Forecast Calendar profile. | S | N/A |
| OS: Opportunity Sales Credit Enforced Sales Team Definition | Set to Yes to keep the forecast credit assignee on the sales team for opportunities. This profile must be set to Yes for Oracle Sales to interoperate with Oracle TeleSales. | SARU | Yes |

Oracle Sales Leads and Opportunities Profile Options

Table Leads and Opportunities Profile Options, page A-8 lists by name and in alphabetical order the profiles that apply to leads and opportunities.

Table A-3 Leads and Opportunities Profile Options

| Profile Name | Description | Level | Default |
|--|---|-------|---------|
| ASN: Default Close Date Days | <p>Determines the default close date (in number of days) when creating an opportunity unless otherwise specified by the user.</p> <p>The default value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | 30 |
| ASN Default Lead Status | <p>Determines the status for a newly-created lead unless otherwise specified by the user.</p> <p>Available values include statuses set up with the applicability "Lead" and the Open flag selected.</p> | SARU | N/A |
| ASN: Default Opportunity Sales Channel | <p>Determines the default sales channel when creating an opportunity unless otherwise specified by the user.</p> <p>The default value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | N/A |

| Profile Name | Description | Level | Default |
|--|---|--------------|---|
| ASN: Default Opportunity Status | <p>Determines the default opportunity status when creating an opportunity unless otherwise specified by the user.</p> <p>Available values are based on statuses set up with the applicability "Opportunity" and the Open flag selected.</p> <p>The default value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | N/A |
| ASN: Default Opportunity Win Probability | <p>Determines the default win probability when an opportunity is created unless otherwise specified by the user.</p> <p>The default value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | N/A |
| ASN: Default Non-Revenue Credit Type | <p>Determines the default credit type used in the non-revenue table for non-revenue forecasting.</p> <p>The default value for this profile can be set by the user through the Sales Default Preferences.</p> | SARU | Values are based on Sales Credit types defined in Order Management. |

| Profile Name | Description | Level | Default |
|--|---|--------------|----------------|
| ASN: Default Win/Loss Status | Determines the win/loss status when a competitor product is added to an opportunity unless otherwise specified by the user. Values are based on the lookup ASN: Win/Loss Status. | SARU | None |
| ASN: Forecast Defaulting Type | Determines the defaulting logic that is executed in the opportunity unless otherwise specified by the user. Also determines the forecast values defaulting logic in the opportunity. | S | Pipeline |
| ASN: Forecast Sales Credit Type | Determines the credit types used for revenue forecasting. | S | N/A |
| ASN: Number of Close Date Quarters Displayed | Determines the number of quarters displayed for a close date. | S | 3 |

| Profile Name | Description | Level | Default |
|---|---|-------|---------|
| OS: Assign New Lead | <p>If set to No, TAP engine is always called to assign the first available resource as lead owner before defaulting lead owner to profile OS: Default Resource ID used for Sales Lead Assignment.</p> <p>If set to Yes, TAP engine is not involved in lead owner assignment.</p> <p>NOTE: This profile should be set to No, so that TAP engine is always used for lead assignment.</p> | S | No |
| OS: Auto Convert Lead to Opportunity | Controls the automatic conversion of a lead to an opportunity. Set to Yes to enable qualified leads to automatically convert to opportunities. | S | Yes |
| OS: Auto Run Lead Engines While Update | Determines whether the lead engines are automatically run when the lead is updated. | S | Yes |
| OS: Default Channel for Lead Channel Selection Engine | Determines the default for each lead if no channel selection rules evaluate to true. | S | Direct |

| Profile Name | Description | Level | Default |
|--|--|--------------|----------------|
| OS: Default Close Date Days | Determines the default for the opportunity close Date in days (Value + Current Date = Opportunity Close Date). Close date is required for opportunity creation. If the close date is not specified, the profile must be set to a positive integer value. | SARU | 150 |
| OS: Default Opportunity Sales Stage | Determines the default used for the sales stages for an opportunity using a sales methodology. | SARU | Stage 1 |
| OS: Default Opportunity Status | Determines the default status of a new opportunity. | SARU | Preliminary |
| OS: Default Opportunity Win Probability | Determines the default value for the win probability field. | SARU | 10 |
| OS: Default Qualified Flag for Lead Qualification Engine | The default Qualification flag is used when none of the qualified rule sets are matched. | S | N/A |
| OS: Default Rating for Lead Rating Engine | Determines the default rank if no ranking rules evaluate to true. | S | Cold Lead |

| Profile Name | Description | Level | Default |
|--|--|--------------|----------------|
| OS: Default Resource ID Used for Sales Lead Assignment | <p>Determines the default Resource ID to which the Territory Assignment Program assigns ownership of a lead, if the program does not find a matching territory for the lead.</p> <p>If this profile is not set, ownership of unassigned leads is automatically assigned to the user creating or importing the lead, if the user has a valid sales role. If the user does not have a valid sales role assigned, unassigned leads are not accessible. Do not set this profile value to Null.</p> | S | N/A |
| OS: Default Opportunity Sales Channel | Determines the default value for the sales channel field for an opportunity. | SARU | Direct |
| OS: Default Status for Leads | Determines the default status for leads. | SRU | New |
| OS: Default Channel for Lead Channel Selection Engine | Determines the default for each lead if no channel selection rules evaluate to true. | S | Direct |

| Profile Name | Description | Level | Default |
|--|--|--------------|----------------|
| OS: Default Close Date Days | Determines the default for the opportunity close Date in days (Value + Current Date = Opportunity Close Date). Close date is required for opportunity creation. If the close date is not specified, the profile must be set to a positive integer value. | SARU | 150 |
| OS: Default Opportunity Sales Stage | Determines the default used for the sales stages for an opportunity using a sales methodology. | SARU | Stage 1 |
| OS: Default Opportunity Status | Determines the default status of a new opportunity. | SARU | Preliminary |
| OS: Default Opportunity Win Probability | Determines the default value for the win probability field. | SARU | 10 |
| OS: Default Qualified Flag for Lead Qualification Engine | The default Qualification flag is used when none of the qualified rule sets are matched. | S | N/A |
| OS: Default Rating for Lead Rating Engine | Determines the default rank if no ranking rules evaluate to true. | S | Cold Lead |

| Profile Name | Description | Level | Default |
|--|--|--------------|----------------|
| OS: Default Resource ID Used for Sales Lead Assignment | <p>Determines the default Resource ID to which the Territory Assignment Program assigns ownership of a lead, if the program does not find a matching territory for the lead.</p> <p>If this profile is not set, ownership of unassigned leads is automatically assigned to the user creating or importing the lead, if the user has a valid sales role. If the user does not have a valid sales role assigned, unassigned leads are not accessible. Do not set this profile value to Null.</p> | S | N/A |
| OS: Default Opportunity Sales Channel | Determines the default value for the sales channel field for an opportunity. | SARU | Direct |
| OS: Default Status for Leads | Determines the default status for leads. | SRU | New |
| OS: Default Channel for Lead Channel Selection Engine | Determines the default for each lead if no channel selection rules evaluate to true. | S | Direct |
| OS: Default Channel for Lead Channel Selection Engine | Determines the default for each lead if no channel selection rules evaluate to true. | S | Direct |

| Profile Name | Description | Level | Default |
|---|--|--------------|----------------|
| OS: Default Close Date Days | Determines the default for the opportunity close Date in days (Value + Current Date = Opportunity Close Date). Close date is required for opportunity creation. If the close date is not specified, the profile must be set to a positive integer value. | SARU | 150 |
| OS: Default Close Date Days | Determines the default for the opportunity close Date in days (Value + Current Date = Opportunity Close Date). Close date is required for opportunity creation. If the close date is not specified, the profile must be set to a positive integer value. | SARU | 150 |
| OS: Default Opportunity Sales Stage | Determines the default used for the sales stages for an opportunity using a sales methodology. | SARU | Stage 1 |
| OS: Default Opportunity Status | Determines the default status of a new opportunity. | SARU | Preliminary |
| OS: Default Opportunity Win Probability | Determines the default value for the win probability field. | SARU | 10 |

| Profile Name | Description | Level | Default |
|--|---|-------|-----------|
| OS: Default Qualified Flag for Lead Qualification Engine | The default Qualification flag is used when none of the qualified rule sets are matched. | S | N/A |
| OS: Default Rating for Lead Rating Engine | Determines the default rank if no ranking rules evaluate to true. | S | Cold Lead |
| OS: Default Resource ID Used for Sales Lead Assignment | Determines the default Resource ID to which the Territory Assignment Program assigns ownership of a lead, if the program does not find a matching territory for the lead. If this profile is not set, ownership of unassigned leads is automatically assigned to the user creating or importing the lead, if the user has a valid sales role. If the user does not have a valid sales role assigned, unassigned leads are not accessible. Do not set this profile value to Null. | S | N/A |
| OS: Default Opportunity Sales Channel | Determines the default value for the sales channel field for an opportunity. | SARU | Direct |
| OS: Default Status for Leads | Determines the default status for leads. | SRU | New |

| Profile Name | Description | Level | Default |
|--|--|-------|---------|
| OS: Enable Real Time Lead Assignment | If set to Yes, then resources are assigned as soon as a transaction is created or updated. | S | No |
| OS: Enable Real Time Opportunity Assignment | If set to Yes, then resources are assigned as soon as a transaction is created or updated. | S | No |
| OS: Enable Rule Engine Log | If set to Y, inserts into the pv_entity_rules_applied table whenever the lead engine is running. If set to N, does not insert any data. | S | Y |
| OS: Enable Tracking Opportunity History Data | Enables opportunity history tracking if set to Yes. | S | No |
| OS: Escalation Manager for Leads | Set this profile when one resource is set as an escalation manager. If Max number of reroutes are reached, an e-mail is sent to the escalation manager about the same. | S | N/A |
| OS: Execute custom code from lead import | Controls the invocation of a custom user hook that can be executed for each record in lead import batch. If set to No, the hook is not executed. | SAR | Y |

| Profile Name | Description | Level | Default |
|---|--|-------|--------------------------|
| OS: Lead Incubation Channel | Oracle Sales does not support the incubation channel. This profile should not have a value set. | S | N/A |
| OS: Lead Link Status | Determines the status of the lead after linking the lead to an opportunity. | S | Converted to Opportunity |
| OS: Lead to Opportunity Move Sales Team | Enables the lead to opportunity move of sales team. Note: In Oracle Sales, the sales team for the lead is carried over to the opportunity while in Oracle TeleSales, whether or not the sales team is carried over is governed by the value in this profile. Therefore, when Oracle TeleSales and Oracle Sales are integrated, this profile option must be set to <i>Yes</i> . | S | No |
| OS: Lead View Scorecard Data | Determines if users can view the Score Card Mapping and rank data. | SARU | N |

| Profile Name | Description | Level | Default |
|-------------------------------------|---|--------------|----------------|
| OS: Maximum Reroutes per lead | Determines the maximum number of reroutes allowed to a lead that is timed out by the monitoring engine during automatic assignment. | S | 3 |
| OS: Move Opportunities | Enables you to move the opportunities belonging to members of a sales group that you move from one group to another. | S | Open |
| PV: Run lead deduplication rule | Controls execution of a new rule based on lead duplication. If set to No, lead duplication does not occur. | S | Y |
| OS: Run Lead Monitor Engine | Is set to Y, the lead is processed by the monitoring engine after it is created or updated. | S | Y |
| OS: Sales Lead Default Close Reason | The Update Sales Lead API assigns statuses to leads based on the value in the OS: Lead Link Status profile. If the status in the profile is Closed, the API picks up the value in this profile. | S | N/A |

| Profile Name | Description | Level | Default |
|--|---|--------------|----------------|
| PV: Run lead deduplication rule | Controls execution of a new rule based on lead duplication. If set to No, lead duplication does not occur. | S | Y |
| OS: Run Lead Monitor Engine | Is set to Y, the lead is processed by the monitoring engine after it is created or updated. | S | Y |
| OS: Sales Lead Default Close Reason | The Update Sales Lead API assigns statuses to leads based on the value in the OS: Lead Link Status profile. If the status in the profile is Closed, the API picks up the value in this profile. | S | N/A |
| OS: Time Frame for Opportunity Logs | Determines the time frame for opportunity logs used for opportunity history tracking. Set to Null for history tracking in Oracle Sales. | S | Null |
| OS: Use DQM Rule code to match Contact | Determines whether the imported lead record is a duplicate. | SARU | N/A |
| OS: Use DQM Rule code to match Party | Determines whether the imported lead record is a duplicate. | SARU | N/A |
| OS: Use DQM Rule code to match Person | Determines whether the imported lead record is a duplicate. | SARU | N/A |

Oracle Sales Account Plan Profile Options

Table Account Plan Profile Options, page A-22 lists by name and in alphabetical order the profiles that apply to setting up account plan functionality.

Table A-4 Account Plan Profile Options

| Profile Name | Description | Level | Default |
|---|---|-------|------------|
| ASN: Account Plan Sales Supplement Template | Determines the sales supplement template that the user will access to create new account plans. When you create a new template for your users, be sure to set the value for the ASN: Account Plan Sales Supplement Template profile option to that template name. | S | N/A |
| ASN: Contact Sales Supplement Template | Determines the sales supplement template that the user will access to enter strategic information for a contact. When you create a new template for your users, be sure to set the value for the ASN: Contact Sales Supplement Template profile option to that template name. | S | N/A |
| ASN: Default Account Plan Document Template | Determines the XML Publisher template used to generate the worksheet for an account plan. The value for this profile can be set by the user through the Sales Default Preferences. | SARU | N/A |
| ASN: Default Sales Document Type | Determines the sales document type. Valid values are specified in the lookup ASN_SALES_DOCUMENT_TYPE. The value for this profile can be set by the user through the Sales Default Preferences. | SARU | N/A |
| OS: Sales Methodology | Determines the default sales methodology for an opportunity. | SARU | Blue Print |

Oracle Sales Security Profile Options

Table Security Profile Options, page A-23 lists by name and in alphabetical order the profiles that apply to security.

Table A-5 Security Profile Options

| Profile Name | Description | Level | Default |
|--|--|-------|------------|
| ASN: Customer Access Privilege | <p>Determines which customers a user can access.</p> <p>If set to Sales Team, a user can only access customers where the user is on the sales team with the Full Access flag selected. If the flag is not selected, the user has read-only access.</p> <p>If set to Full, a user can access all customers.</p> | SARU | Sales Team |
| ASN: Default Value for Sales Team Do Not Reassign Flag | <p>Determines whether sales team members can be reassigned.</p> <p>Based on the profile value, the Do Not Reassign flag is selected or cleared when a sales team is added to a customer, lead, and opportunity record.</p> | S | Yes |
| ASN: Lead Access Privilege | <p>Determines which leads a user can access.</p> <p>If set to Sales Team, a user can update leads where the user is on the sales team with the Full Access flag selected. If the flag is not selected, the user has read-only access.</p> <p>If set to Full, a user can access all leads.</p> | SARU | Sales Team |

| Profile Name | Description | Level | Default |
|----------------------------|---|-------|-------------|
| ASN: Manager Update Access | <p>Determines the level of access a manager has to leads, opportunities, customers and contacts belonging to the manager's sales groups, subgroups and subordinates.</p> <p>If set to View Data, the manager can only view their subordinate's leads, opportunities, and customers.</p> <p>If set to Update Data, the manager can update their subordinate's leads, opportunities, and customers.</p> <p>If set to Inherit Data, the manager inherits the subordinate access. If the subordinate has view-only access, the manager can only view the leads, opportunities, and customers of the subordinate. If the subordinate has update access, the manager can update leads, opportunities, and customers of the subordinate. If the manager has multiple subordinates, the manager inherits the highest level of access.</p> <p>Note: The functioning of this profile is based on the setting in the ASN: Customer Access Privilege, ASN: Lead Access Privilege, and ASN: Opportunity Access Privilege profiles. If they are all set to Sales Team and this profile is set to Update, the administrator has update access to customers, leads, and opportunities in the administrator's or subordinate's sales teams.</p> | SARU | Update Data |

| Profile Name | Description | Level | Default |
|---|--|-------|------------|
| ASN: Opportunity Access Privilege | <p>Determines the level of access a user has to opportunities.</p> <p>If set to Sales Team, a user can update opportunities if they are on the sales team with the Full Access flag selected. If the full access flag is not selected, the user has read-only access to the opportunities.</p> <p>If set to Full, a user can access all opportunities.</p> | SARU | Sales Team |
| ASN: Sales Admin Forecast Update Access | <p>Determines whether a user with the Sales Admin responsibility can create, update, and submit forecasts for a sales manager. Set to Yes to enable the Sales Admin to update a sales manager's forecasts. The Sales Admin has view only access to a manager's forecast details unless the profile option ASN: Sales Admin Forecast Update Access is set to Yes. Note that even with the ASN: Sales Admin Forecast Update Access profile set to Yes, the Sales Admin will not be able edit the sales manager's owned opportunities on the Forecast page. The Sales Admin can edit the opportunities by drilling down to the opportunity page depending on the setting of the ASN: Sales Admin Update Access profile.</p> | SARU | No |

| Profile Name | Description | Level | Default |
|--------------------------------|---|-------|-----------|
| ASN: Sales Admin Update Access | <p>Determines the level of access a sales administrator has to leads, opportunities, customers and contacts belonging to the sales manager's sales groups, subgroups and subordinates.</p> <p>If set to View, the Sales Admin has read-only access to those business objects to which the sales manager of the Sales Admin's sales group (or groups) has access.</p> <p>If set to Update, the Sales Admin has update access to those business objects to which the sales manager of the Sales Admin's sales group (or groups) has access.</p> <p>If set to Inherit, the Sales Admin has the highest level of access that a subordinate of the sales manager of the Sales Admin's sales group (or groups) has on the business object sales team.</p> <p>Note: The functioning of this profile is based on the setting in the ASN: Customer Access Privilege, ASN: Lead Access Privilege, and ASN: Opportunity Access Privilege profiles. If they are all set to Sales Team and this profile is set to Update, the administrator has update access to customers, leads, and opportunities in the administrator's or subordinate's sales teams.</p> | SARU | View Data |

Oracle CRM Foundation Profile Option

Table CRM Foundation Profile Option for Oracle Sales, page A-27 lists the CRM Foundation profile option that must be set during Oracle Sales implementation.

Table A-6 CRM Foundation Profile Option for Oracle Sales

| Profile Option | Description | Level | Default |
|-------------------------|--|--------------|----------------|
| ICX: Preferred Currency | Determines the default currency in the user interface. | SARU | N/A |

Oracle Sales Foundation Profile Options

Table Oracle Sales Foundation Profile Options, page A-27 lists the Oracle Sales Foundation profile options that must be set during Oracle Sales implementation.

Table A-7 Oracle Sales Foundation Profile Options

| Profile Name | Description | Level | Default |
|--|--|--------------|----------------|
| OS: Date Mapping Type | Determines date mapping type. Used for setting up pseudo period rates for multi-currency. It determines whether the pseudo period rate would be set up by looking at the conversion rate at the start of the period or at the end of the period. | S | N/A |
| OS: Enable Real Time Customer Assignment | If set to Yes, then resources are assigned as soon as a transaction is created or updated. | S | No |

| Profile Name | Description | Level | Default |
|--|--|--------------|----------------|
| OS: Enable Tracking Purchase Line History Data | Enables product and non-revenue history tracking if set to Yes. The OS: Enable Tracking Sales Credits History Data profile must also be set to Yes to enable this history tracking. To disable this tracking, set both profiles to No. | S | No |
| OS: Enable Tracking Sales Credits History Data | Enables product and non-revenue history tracking if set to Yes. The OS: Enable Tracking Purchase Line History Data profile must also be set to Yes to enable this history tracking. To disable this tracking, set both profiles to No. | S | No |
| OS: Hash Area Size for TAP | Set this profile to 100000000 or more. | S | N/A |
| OS: Maximum Roll Days for Converting Amount | Determines the pseudo rate set up for multi-currency. Determines the number of days to look back if the conversion rate is missing on the first day or last day of the period (as determined by the profile OS: Date Mapping Type). | S | N/A |

| Profile Name | Description | Level | Default |
|--|--|-------|-----------|
| OS: Number of Child Proposal Workers for TAP | Determines the maximum number of parallel workers (of Generate Access Records) spawned to process proposal records. Maximum allowed is 10. | S | 2 |
| OS: Number of Child Quote Workers for TAP | Determines the maximum number of parallel workers (of Generate Access Records) spawned to process quote records. Maximum allowed is 10 | S | 2 |
| OS: Preferred Reporting Currency | Preferred currency for denorm programs | S | US Dollar |
| OS: Sort Area Size for TAP | Set this profile to 100000000 or more. | S | N/A |

Oracle Receivables Profile Option

A specific Oracle Receivables profile option must be set during Oracle Sales implementation. For more information on Oracle Receivables profile options, refer to the *Oracle Receivables Implementation Guide*.

Table Receivables Profile Option for Oracle Sales, page A-30 lists the description and default value for the Receivables profile option that must be set during implementation.

Table A-8 Receivables Profile Option for Oracle Sales

| Profile Option | Description | Level | Default |
|-----------------------|---|--------------|----------------|
| HZ: Raise API Events | If the value is set to Yes, then changes made to the customer records are considered while TAP processing in New Mode. The value must be set to Yes for TAP New Mode to work. | SARU | No |

Oracle Trading Community Architecture Profile Options

Specific Oracle Trading Community Architecture (TCA) profile options must be set during Oracle Sales implementation. For more information on Oracle TCA profile options, refer to the *Oracle Trading Community Architecture User Guide*.

Table TCA Profile Options for Oracle Sales, page A-31 lists the description and default value for the TCA profile option that must be set during implementation.

Table A-9 TCA Profile Options for Oracle Sales

| Profile Option | Description | Level | Default |
|------------------------|--|--------------|----------------|
| HZ: Default Party Type | <p>Determines the default value for the Customer Type field on the customer search pages. Valid values are Organization (default) or Person. By default, Oracle Sales displays customers that are organizations. You can use personalization to support an environment in which customers are organizations only, or in which customers are persons only, or a blended environment which includes customers that are persons as well as customers that are organizations.</p> <p>The setting of this profile option must match the personalizations for customer information, and not conflict with them. For example, do not set this profile option to Person and then disable the person information for customers. In a blended environment (containing customer data for customers who are organizations and also those who are persons), the setting for this profile option determines the default value for the Customer Type field on the customer search and select pages.</p> | SARU | Organization |

| Profile Option | Description | Level | Default |
|--|---|--------------|--|
| HZ: Display Certification Level | Determines whether the certification level is displayed to the user. Applicable only for customers as organizations (business to business). This profile setting applies to all Oracle applications that are using the TCA certification feature. | S | No |
| HZ: DQM Resolution for Party Name Searches That Exceed Maximum Number of Results | Determines the DQM search behavior. The default is Prompt User for Additional Search Criteria and the other valid value is Perform Standard SQL Search. The default retains the existing behavior, which performs a query based on the DQM match rules setup. When this profile is set to Perform Standard SQL Search, if the number of results returned by the DQM intermedia query is greater than the threshold value defined in the profile option: HZ: Maximum Number of Match Results, then it will perform and return results using a regular SQL query. | SARU | Prompt User for Additional Search Criteria |
| HZ: Match Rule for Contact Advanced Search | Determines the seeded or user-defined match rule for determining the search criteria and results for the contact advanced search. | SAR | HZ_CONTACT_ADV_SEARCH_RULE |

| Profile Option | Description | Level | Default |
|--|--|--------------|-------------------------------|
| HZ: Match Rule for Contact Simple Search | Determines the seeded or user-defined match rule for determining the search criteria and results for the contact simple search. | SAR | HZ_CONTACT_SIMPLE_SEARCH_RULE |
| HZ: Match Rule for Contact Duplicate Prevention | Determines the seeded or user-defined match rule for identifying potential duplicates of the contact that the user is creating. | SAR | HZ_CONTACT_SIMPLE_SEARCH_RULE |
| HZ: Match Rule for Organization Advanced Search | Determines the seeded or user-defined match rule for determining the search criteria and results for the organization advanced search. | SAR | HZ_ORG_ADV_SEARCH_RULE |
| HZ: Match Rule for Organization Duplicate Prevention | Determines the seeded or user-defined match rule for identifying potential duplicates of the organization that the user is creating. | SAR | HZ_ORG_SIMPLE_SEARCH_RULE |
| HZ: Match Rule for Organization Simple Search | Determines the seeded or user-defined match rule for determining the search criteria and results for the organization simple search. | SAR | HZ_ORG_SIMPLE_SEARCH_RULE |
| HZ: Match Rule for Person Advanced Search | Determines the seeded or user-defined match rule for determining the search criteria and results for the person advanced search. | SAR | HZ_PERSON_ADV_SEARCH_RULE |
| HZ: Match Rule for Person Duplicate Prevention | Determines the seeded or user-defined match rule for identifying potential duplicates of the person that the user is creating. | SAR | HZ_PERSON_SIMPLE_SEARCH_RULE |

| Profile Option | Description | Level | Default |
|---|--|--------------|------------------------------|
| HZ: Match Rule for Person Simple Search | Determines the seeded or user-defined match rule for determining the search criteria and results for the person simple search. | SAR | HZ_PERSON_SIMPLE_SEARCH_RULE |
| HZ: Maximum Number of Match Results | Determines the maximum number of matching records from a match rule. | SARU | 200 |
| HZ: Reference Territory | Specify the default territory used in determining the appropriate address style formats. If this profile option is left blank, then the current session's NLS Territory setting is used. This profile option also controls whether an address is considered domestic or foreign, for showing or hiding the country name. | S | N/A |

Multiple Organization (MO) Profile Options

Table Multiple Organizations Profile Options for Oracle Sales, page A-35 lists by name and in alphabetical order the profiles that apply to setting up multiple organization functionality.

Table A-10 Multiple Organizations Profile Options for Oracle Sales

| Profile Option | Description | Level | Default |
|----------------------------|---|--------------|----------------|
| MO: Default Operating Unit | Determines the default operating unit. See the <i>Oracle Applications Multiple Organizations Implementation Guide</i> for details on enabling Oracle Sales users to access multiple operating units while logged in using a single responsibility. This is a mandatory profile option if you are implementing multiple organization functionality. If you are not implementing multiple organizations, set the MO: Operating Unit profile option instead. | | N/A |

| Profile Option | Description | Level | Default |
|----------------------|---|-------|---------|
| MO: Operating Unit | Determines the operating unit that users will access in an environment that does not support multiple operating units. This is a mandatory profile option if you are not implementing multiple organization functionality. If you are implementing multiple organizations, set the MO: Default Operating Unit profile option instead. See the <i>Oracle Applications Multiple Organizations Implementation Guide</i> for details. | | N/A |
| MO: Security Profile | Determines the list of operating units that the user can access. See the <i>Oracle Applications Multiple Organizations Implementation Guide</i> for details. | | N/A |

Oracle Applications Framework Profile Option

This Oracle Application Framework profile option must be set during Oracle Sales implementation to run Oracle Sales. For more information on Oracle Applications Framework profile options, refer to the *Oracle Application Framework Developer's Guide*.

Table Oracle Applications Framework Profile Option for Oracle Sales, page A-37 lists the description and default value for the Oracle Applications Framework profile option that must be set during implementation.

Table A-11 Oracle Applications Framework Profile Option for Oracle Sales

| Profile Option | Description | Level | Default |
|-----------------------------------|---|--------------|----------------|
| FND: Framework Compatibility Mode | Sets the software version number for compatibility mode. Oracle Sales requires this profile to be set to 11.5.10. | SA | N/A |

Web ADI Profile Option

Set this profile option to enable Oracle Sales users to export opportunities from the Forecast page to a spreadsheet using Web ADI functionality. This enables the users to download to a spreadsheet all opportunities that match the forecast parameters criteria using the Export Opportunities button.

Table A-12 Oracle Web Applications Desktop Integrator Profile Option for Oracle Sales

| Profile Option | Description | Level | Default |
|----------------------------|--|--------------|----------------|
| BNE_UIX_PHYSICAL_DIRECTORY | Set this profile option to the path to the UIX (Cabo) libraries that are used to generate the Web ADI user interface. See the <i>Web Applications Desktop Integrator Implementation Guide</i> for details. | S | N/A |

Seeded Lookup Types

This appendix covers the following topics:

- Overview of Lookup Types

Overview of Lookup Types

This appendix contains information on the seeded Oracle Sales lookup types.

If lookups have **System** level access, you can modify the meaning and description.

If lookups have **User** level access, you can:

- Change the meaning and description
- Change the tag
- Disable a lookup

Note: While defining a lookup code, if you specify a Tag, ensure that it is a valid number.

Table Oracle Sales Lookup Types, page B-1 lists descriptions and access levels for seeded Oracle Sales Lookup Types (QuickCodes).

Table B-1 Oracle Sales Lookup Types

| Lookup Type | Description | Access Level |
|----------------------|---|--------------|
| ASN_ACCESS_PRIVILEGE | Determines options for the security profile options | System |

| Lookup Type | Description | Access Level |
|---------------------------------|--|---------------------|
| ASN_AP_BUSDRV_PRIORITY | Determines the priority of the business drivers for an account plan. | User |
| ASN_AP_BIZDRVR_STATUS | Determines the status of the business drivers for an account plan. | System |
| ASN_AP_OBJECTIVE_STATUS | Determines the status of the revenue as well as strategic objectives for an account plan | System |
| ASN_BUSINESS_ACTS | Determines the options available in the business activities selection dropdown. | User |
| ASN_CONTACT_ACTIONS | Determines the actions available in the contact table for leads and opportunities. | User |
| ASN_CONTACT_ROLE | Determines the options shown in the Contact Role menu for both leads and opportunities. | User |
| ASN_CUST_CONTACT_ACTIONS | Determines the actions available in the contact details page. | User |
| ASN_CUSTOMER_ACTIONS | Determines the actions available in the customer details page. | User |
| ASN_DASH_SLS_METH_FUNNEL_STAGES | Determines the stage mapped to each funnel section of the Sales Funnel in the Sales Dashboard. | User |
| ASN_FRCST_FORECAST_TYPE | Determines the options for the forecast type (Revenue and Non-Revenue). | System |

| Lookup Type | Description | Access Level |
|-------------------------------|---|--------------|
| ASN_FRCST_DEFAULTING_TYPE | Determines the values for the Forecast defaulting profile option. | System |
| ASN_FRCST_FORECAST_STATUS | Determines if the forecast is created in Saved or Submitted status. Available values are Saved and Submitted. | System |
| ASN_FRCST_MAX_OPPTY_DISPLAYED | Determines the maximum number of opportunities that can be displayed in forecasting. | System |
| ASN_FRCST_MGR_WS_DEF_OPTIONS | Determines the defaulting options for Sales Manager worksheet. | System |
| ASN_FRCST_REP_WS_DEF_OPTIONS | Determines the defaulting options for Sales Representative worksheet. | System |
| ASN_FRCST_WORKSHEET_TYPE | Determines the type of the worksheet in the forecast worksheet header table. | System |
| ASN_LEAD_AGE | Determines the number of days to be used in searches that are based on the age (in days) of a lead. | User |
| ASN_LEAD_CLOSE_REASON | Determines the options shown in the Lead Close Reason menu. Note: Do not disable the close reason <i>Converted to Opportunity</i> . | User |
| ASN_LEAD_HIST_HDR | Determines the Lead Header fields for which history is tracked. | System |

| Lookup Type | Description | Access Level |
|-----------------------------|--|--------------|
| ASN_LEAD_VIEW_NOTES | Determines the filter options displayed in the lead View Notes feature. | System |
| ASN_OBJECT_TYPE | Identifies the Sales product objects. | System |
| ASN_OPPTY_CLOSE_REASON | Determines the options shown in the Opportunity Close Reason menu. | User |
| ASN_OPPTY_CMPT_FLEX_DISPLAY | Determines the display of additional information for opportunity products. | User |
| ASN_OPPTY_HIST_HDR | Determines the Opportunity Header fields for which history is tracked. | System |
| ASN_OPPTY_HIST_NREV | Determines the Opportunity Non-Revenue Credit fields for which history is tracked. | System |
| ASN_OPPTY_HIST_PROD | Determines the Opportunity Product Line fields for which history is tracked. | System |
| ASN_OPPTY_VIEW_NOTES | Determines the filter options displayed in the opportunity View Notes feature. | System |
| ASN_RELATIONSHIP_TYPE | Determines relationship type; required for sales methodology setup | System |
| ASN_SALESCYCLE_VIEW | Determines the <i>View</i> options for the sales cycle. | System |
| ASN_SALES_DOC_TYPE | Determines the output format for generated sales coach and account plan documents. | System |

| Lookup Type | Description | Access Level |
|---------------------------|---|---------------------|
| ASN_SERVICE_REQUEST_TYPE | Labels the first two rows in the service summary table. | System |
| ASN_STAGE_APPLICABILITY | Determines if a methodology stage is valid for a lead, an opportunity, or for both. | System |
| ASN_STATUS_CATEGORY | Determines whether a lead is open or closed. | System |
| ASN_TIME_RANGE | Determines the time ranges available to search by in the lead search page | User |
| ASN_TIME_ZONE | Determines the search by options available for time zone in the Lead search page. | User |
| ASN_TOP_CUST_ORG_ORDER_BY | Determines the choices available in the Order By dropdown menu on the Sales Dashboard Top Customers (Organization) table. The dropdown values are Total Opportunity Amount and Total Ordered. | User |
| ASN_TOP_CUST_PER_ORDER_BY | Determines the choices available in the Order By dropdown menu on the Sales Dashboard Top Customers (Person) table. The dropdown values are Total Opportunity Amount and Total Ordered. | User |
| ASN_UPDATE_ACCESS | Determines the options available in the Manager security profile option. | System |
| ASN_VEHICLE_RESPONSE_CODE | Determines the options available for lead and opportunity response channel. | User |

| Lookup Type | Description | Access Level |
|---------------------------|--|--------------|
| ASN_WIN_LOSS_STATUS | Determines the options shown in the Win/Loss status menu for the opportunity line competitor products. | System |
| ASN_WIN_PROBABILITY_RANGE | Determines the ranges for win probability. | User |

Seeded Views

This appendix covers the following topics:

- Overview of Views

Overview of Views

Views are saved sets of search criteria. Users can use the seeded views provided with Oracle Sales, or can create their own views for the Sales Dashboard Lead and Opportunity tables, or for the Lead and Opportunity Views pages.

Table Oracle Sales Seeded Leads Views, page C-2 lists seeded views for leads.

Table C-1 Oracle Sales Seeded Leads Views

| View | Description | Columns Displayed | Default Seeded View |
|-----------------------|--|---|----------------------------|
| My Open Leads (Owner) | Displays open leads where the user is the owner of the lead. Leads are sorted by creation date (descending) and 10 rows are displayed. | <ul style="list-style-type: none">• Lead Name (links to lead details page)• Primary Contact (links to contact details page)• Customer Name (links to customer details page)• Rank• Status• Age (days)• Local Time• Convert to Opportunity (icon) | Yes |

| View | Description | Columns Displayed | Default Seeded View |
|-------------------------------|--|--|----------------------------|
| My Open Leads (Sales Team) | Displays open leads where the user on the sales team for the lead. Leads are sorted by creation date (descending) and 10 rows are displayed. | <ul style="list-style-type: none"> • Lead Name (links to lead details page) • Primary Contact (links to contact details page) • Customer Name (links to customer details page) • Rank • Status • Age (days) • Local Time • Convert to Opportunity (icon) | No |

Table Oracle Sales Seeded Opportunities Views, page C-4 lists seeded views for opportunities.

Table C-2 Oracle Sales Seeded Opportunities Views

| View | Description | Columns Displayed | Default Seeded View |
|------------------------------------|---|---|----------------------------|
| My Open Opportunities (Owner) | Displays open opportunities where the user is the owner of the opportunity. Opportunities are sorted by last modified date (descending) and 10 rows are displayed. | <ul style="list-style-type: none">• Opportunity Name (links to opportunity details page)• Customer Name (links to customer details page)• Close Date• Status• Stage• Amount• Currency | Yes |
| My Open Opportunities (Sales Team) | Displays open opportunities where the user is on the sales team for the opportunity. Opportunities are sorted by last modified date (descending) and 10 rows are displayed. | <ul style="list-style-type: none">• Opportunity Name (links to opportunity details page)• Customer Name (links to customer details page)• Close Date• Status• Stage• Amount• Currency | No |

| View | Description | Columns Displayed | Default Seeded View |
|--|---|--|----------------------------|
| Top Opportunities (Current Quarter) | Displays top opportunities where the user is on the sales team for the opportunity. Opportunities are sorted by converted forecast amount (descending) and 10 rows are displayed. | <ul style="list-style-type: none"> • Opportunity Name (links to opportunity details page) • Customer Name (links to customer details page) • Stage • Close Date • Win Probability % • Converted Amount • Converted Forecast | No |

Seeded Roles and Responsibilities

This appendix covers the following topics:

- Roles and Responsibilities to Use with Oracle Sales
- Oracle Forms Responsibilities
- Oracle Self Service Responsibilities

Roles and Responsibilities to Use with Oracle Sales

This appendix lists the Oracle Forms and Oracle CRM Applications users and responsibilities necessary to implement Oracle Sales.

You can create new users and responsibilities, and assign responsibilities as needed. See *Oracle Applications System Administrator's Guide*, *Oracle CRM Technology Foundation Implementation Guide*, and *Oracle CRM Technology Foundation Concepts and Procedures* for more information.

Oracle Forms Responsibilities

Log in with the appropriate user name and responsibility to perform the specified tasks.

Table Oracle Forms Responsibilities, page D-1 lists the responsibilities necessary to perform setup tasks for Oracle Sales in Oracle Forms.

Table D-1 Oracle Forms Responsibilities

| Responsibility | Tasks |
|-----------------------|---|
| Application Developer | Set up descriptive flexfields and lookups |
| CRM Administrator | Set up notes, tasks, and calendar |

| Responsibility | Tasks |
|----------------------------|---|
| CRM Resource Manager | Create resources, assign roles to employees, create resource groups |
| General Ledger Super User | Set up multiple currencies |
| Oracle Sales Administrator | Run concurrent programs and set Oracle TeleSales lookup codes |
| Quoting Sales Manager | Set up the sales supplement templates used for sales coaches |
| System Administrator | Set profile options and create users. Set up currency codes |
| Trading Community Manager | Set up DQM |

Oracle Self Service Responsibilities

Log in with the appropriate user name and responsibility to perform the specified tasks.

Table Oracle Self Service Responsibilities, page D-2 summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle Sales in Oracle CRM Applications.

Table D-2 Oracle Self Service Responsibilities

| Responsibility | Tasks |
|-----------------------|---|
| Sales Administrator | Set up sales stages, sales methodologies, win probabilities, status codes, and forecasting categories and mappings. Set up type mappings and pseudo period rates for multiple currencies. |
| Sales Manager | Access the Oracle Sales User interface as a sales manager or Sales Admin. This responsibility is seeded by DBI for Sales. |

| Responsibility | Tasks |
|---|---|
| Sales User | Access the Oracle Sales user interface as a sales representative. This responsibility should be assigned only to the sales representatives, not to the sales manager or Sales Admin. If a sales manager or Sales Admin is assigned this responsibility, that user will not be able to access the data for any subordinates. |
| Functional Administrator | Sets profile options, look ups, and personalizations. |
| Daily Business Intelligence Administrator | Run DBI concurrent programs. |

Concurrent Programs

This appendix covers the following topics:

- Concurrent Programs and Request Set
- Concurrent Programs
- Request Set - Update as_accesses_all denorm flag

Concurrent Programs and Request Set

This appendix provides information on the concurrent programs used by Oracle Sales. Each concurrent program in this table is also described in the implementation step where it is set.

For a detailed description of the procedures for running concurrent programs and request sets, refer to the *Oracle Applications System Administrator's Guide*.

This section describes the concurrent programs and a request set.

Concurrent Programs

Table Concurrent Programs, page E-2 lists by name and in alphabetical order the concurrent programs used by the Oracle Sales.

Table E-1 Concurrent Programs

| Concurrent Program Name | Description |
|---|--|
| Auto create opportunity from sales lead | <p>Creates opportunities from existing sales leads. This program should be run after the Import Sales Leads program.</p> <p>Parameters:</p> <p>Debug Mode</p> <p>Trace Mode</p> |
| Flatten group hierarchy | <p>Denormalizes the Resource Group hierarchy structure into a flat structure for faster data access.</p> <p>Schedule: For about 4000 groups, and an average of 10 level hierarchy structure, this program takes about 10-15 minutes. It can be scheduled as a nightly process.</p> |
| Generate Access Records (ASTGAR) | <p>Runs automatically after Assign Territory Accesses. ASTGAR calls the JTF API, which populates the winning territory table (JTF_TAE_1001_ACCOUNT/OPPOR/LEAD_WINNERS) based upon territory definitions. The program then inserts, updates, or deletes AS_ACCESES_ALL and AS_TERRITORY_ACCESES tables to make assignments.</p> |
| Synchronize Territory Assignment Rules | <p>This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.</p> |

| Concurrent Program Name | Description |
|---|---|
| Initial Load of Opportunity Log Tables | Loads data from the opportunity transaction tables AS_LEADS_LOG, AS_LEAD_LINES_ALL, AS_SALES_CREDITS to the corresponding log tables AS_LEADS_LOG, AS_LEAD_LINES_LOG, AS_SALES_CREDITS_LOG if the transaction data does not have log records in the log tables. Set following profile options to Yes before submitting the concurrent program OS: Enable Tracking Opportunity History Data, OS: Enable Tracking Purchase Line History Data, and OS: Enable Tracking Sales Credits History Data. |
| Load Sales Lead Interface table from flat file (AS) | Imports sales leads from the interface. This program must be run before Auto Create Opportunity from Sales Lead. This moves data from the interface table to AS_SALES_LEADS, AS_SALES_LEADS_LINES, and AS_SALES_LEAD_CONTACTS. If you want to import data from a flat file, you must first run OTS: Load Sales Lead, which moves data from the flat file to the interface table. |
| Refresh AS_PERIOD_DAYS table | This program must be run before you can run the Refresh Multi-Currency Conversion Rates. This sequence of programs must be rerun if the GL period definitions are changed. |
| Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES) | Refreshes the multi-currency conversion rates in setting multiple currency. |
| Refresh of as_sales_credits_denorm | Used for opportunity reports and forecasting functionality. This program must be run before a user can run opportunity reports and perform forecasting functions. |

| Concurrent Program Name | Description |
|---|---|
| Refresh of Opportunity Status Aging Summary Table | <p>Refreshes the summary data for opportunities that have been created or updated since the last refresh time. There is only one version of this concurrent program, and you use the same program for incremental updates.</p> <p>This concurrent program was created to extract status log data from AS_LEADS_LOG, calculate the summary data from the log data, and refresh ASO_LOG_STATUS_SUMMARY table with the summary data.</p> <p>Oracle recommends that you run this program daily to update the Days in Status information for the Opportunity Aging report.</p> |

Request Set - Update as_accesses_all denorm flag

The Update as_accesses_all denorm flag request set is run to update the status of an opportunity or a lead from Open to Closed, or from Closed to Open. It updates the denorm flag for AS_ACSESSES_ALL and AS_SALES_LEADS, updating the STATUS_OPEN_FLAG in the AS_SALES_LEADS table and OPEN_FLAG in the AS_ACSESSES_ALL_ALL table under the Oracle Sales Administrator responsibility. Open records are flagged with a Y; Closed records with an N.

There are three stages in this request set. Only the stage 2 concurrent programs require parameters.

There are three concurrent programs in stage 2. These are:

- Update as_accesses_all denorm flag for Leads and opportunity
- Update close_reason for Leads - Main
- Update close_reason for Opportunities - Main

All three programs in stage 2 share the same set of parameters and the parameters must be supplied only once to be used by all three concurrent programs.

The concurrent programs in stage 2 take five parameters:

- X_OPEN_FLAG - 1 character
- X_STATUS_CODE - 30 characters

If you know which status codes have changed, then set the parameters to N (if the

status has changed from Open to Closed) or Y (if the status has changed from Closed to Open).

If you do not know which status codes have changed, or want to update all of the access records or leads records, no matter which status has changed, then set the parameters to these values:

X_OPEN_FLAG - NULL (Empty), X_STATUS_CODE - ALL

The other three parameters control the performance of the programs when large data volumes are processed. If you do not process large data volumes, do not change the default values for these parameters.

- p_num_workers - Number of workers which are spawned by each of the concurrent programs in stage 2. The default is 2. If data volumes being handled are large, this parameter can be increased to 3 or 4.
- p_batch_size - Number of records which are committed by a worker at one time. The default is 10000.
- p_debug_flag - Enables debug messages to be written to logs.

These settings update the flag for all access records or leads records. Note that if you set X_STATUS_CODE to ALL, this request set runs for a long period, depending on the number of access records in AS_ACCESSES_ALL_ALL. This request set creates a temporary index to use while the programs run. Successful index creation requires that the insert and update records functionality is not in use.

Product Hierarchies and Forecasting

This appendix covers the following topics:

- General Guidelines
- Product Category Added to Forecast Category
- Parent to Forecastable Category Added Within the Hierarchy
- Child Product Category Node is Moved in Hierarchy and Becomes Forecastable
- Forecastable Product Category Moved Under Non-Forecastable Node
- Forecastable Product Category Child of Another Forecastable Product Category
- Forecastable Product Category Disabled Within the Product Hierarchy
- Forecastable Product Category Flagged as Not Visible to SME
- Forecastable Product Category Deleted From the Product Hierarchy

General Guidelines

This appendix describes how changes to the product hierarchy affect sales forecasting. These are the general guidelines for product hierarchies and forecasting:

- The administrator can map a node at any level in the product hierarchy to a Forecast Category. However, Oracle Sales recommends that the administrator map each Forecast Category to those products in hierarchy nodes that do not have a parent. This ensures that the forecast roll-up is based on the highest level of the product category.
- The administrator can end-date a Forecast Category mapping at any time. It is recommended that the administrator end-date the mapping on a date that is a common denominator for all periods. End-dating mappings in the middle of a period causes the loss of saved and direct report submitted data.
- It is possible to submit a forecast after a forecast period has ended. Users often

perform this action to reconcile the forecast with actual orders. If a product category was end-dated prior to the current date, the user cannot adjust the product category forecast for the end-dated product category. In this case, the user should reconcile the individual opportunities in the product category, save the changes, and regenerate the forecast using Current Opportunity defaulting. Upon completion, the user can resubmit the corrected forecast.

Note: If you want the user to be able to reconcile the forecast for an extended length of time after the period has ended, the administrator should end-date the mapping on a date soon after the reconciliation period is over. However, this causes the forecast to include Product Categories for the new period until that specified end-date.

Product Category Added to Forecast Category

The administrator can map a new product category to a forecast category. Depending on the start date designated in the forecast category mapping, this change might occur mid-period or at the beginning of the next period.

When mapping a Product Category to a Forecast Category, the administrator should give a start date that reflects the first date of the upcoming period. This prevents confusion, as newly mapped product categories are included in a user's forecast the next time they access the forecast for the given Forecast Category.

Parent to Forecastable Category Added Within the Hierarchy

The administrator can add a new product category within the PLM hierarchy. This product category can be added as the parent of an existing product category.

If adding a new product category, as the parent of another forecastable product category, to the PLM hierarchy, the administrator must:

1. End-date the previously forecastable product category with the current date
2. Add the new product category to the Forecast Category mapping with the current date as the Start date.

Failure to perform these steps causes double counting and the forecast shows incorrect data.

Child Product Category Node is Moved in Hierarchy and Becomes Forecastable

The administrator can move a child product category within the hierarchy, so that it is

no longer a child, and is therefore forecastable. The Oracle Sales Administrator must then make this product category forecastable by mapping it to a Forecast Category.

Refer to Product Category Added to Forecast Category , page F-2 for guidelines.

Forecastable Product Category Moved Under Non-Forecastable Node

If the administrator moves a product category and its children, making it the child of a non-forecastable product category, there is no change to the forecast category and mappings.

Forecastable Product Category Child of Another Forecastable Product Category

The administrator is not prevented from moving a forecastable product category under another forecastable product category, thereby making it a child. If this action is performed, the parent and child are both mapped to the same forecast category which causes double counting in the Opportunity Forecast Summary and Forecast Worksheet. Therefore, the system administrator must end-date the mapping of the child product category to the Forecast Category immediately after the product hierarchy is changed.

When end-dating the child category, the system administrator should instruct users to view their latest submission and add the child node's forecast values to the existing forecast values of the parent node, as the saved forecast data for the child node is lost.

Forecastable Product Category Disabled Within the Product Hierarchy

The administrator can disable a forecastable product category within the hierarchy at any time by entering a Disable date.

The system administrator should not end-date the product category - forecast category mapping until the end of the period. If the mapping is disabled, the product category is dropped from the forecast and a user cannot add the Product Category to an opportunity in the future, but lines created before the mapping was disabled are still valid.

Forecastable Product Category Flagged as Not Visible to SME

The administrator can set a *Not Visible* flag for a product category within the hierarchy.

Refer to Forecastable Product Category Disabled Within the Product Hierarchy, page F-3 for guidelines.

Forecastable Product Category Deleted From the Product Hierarchy

The administrator can entirely delete a product category from the product hierarchy,

but must end-date the product category forecast category mapping, as the product category is no longer valid for opportunities in the pipeline.

The system administrator should end date the product category to forecast category mapping immediately after the product category is deleted from the hierarchy, as opportunity lines that carry that product category become invalid and are no longer forecastable.

Oracle Sales - Oracle TeleSales Interoperability

This appendix covers the following topics:

- Oracle Sales - Oracle TeleSales Interoperability
- Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options
- Setting Corresponding Oracle Sales and Oracle Trading Community Architecture
- Setting Oracle TeleSales and Leads Profile Options
- Setting Oracle TeleSales and Oracle Sales Lookups
- Differences Between Oracle Sales and Oracle TeleSales
- Sales Methodology
- Converting Leads to Opportunities
- Role and Address in Sales Team
- Customer Sales Team
- Rolling Forecast
- Marketing Campaigns/Offers
- Freeze Flag
- Close Competitor and Comment
- Customer Budget Status
- End Customer and Address
- Projects and Decision Timeframe
- Accepting or Rejecting Leads
- Concurrent Updates
- Forecasting

- Attachments
- Incentive Compensation
- Lead and Opportunity Currency
- Account Plans and Strategic Information

Oracle Sales - Oracle TeleSales Interoperability

Oracle Sales and Oracle TeleSales are interoperable if these setup steps are performed:

- Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options, page G-2
- Oracle TeleSales and Leads Profile Options, page G-3
- Oracle TeleSales and Oracle Sales Lookups, page G-4

Leads, Opportunities, Forecast, Sales Category, and Call Center must be set up for use in TeleSales. To do so, log in to Oracle Forms with the TeleSales Administration responsibility. Navigate to the Administration page.

Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options

Oracle Sales and Oracle TeleSales each have separate sets of profile options that do not affect the other application. Therefore, when a feature in Oracle TeleSales is dependant on a profile option, setting the TeleSales profile option does not affect Oracle Sales. You must set the corresponding Oracle Sales profile option separately.

Note: Corresponding profile options might have slightly different values. You should choose a value supported by both, if you want the behavior to be the same. Additionally, there might be TeleSales profile options for which there are no corresponding Oracle Sales profile options. You should set these profile options to simulate Oracle Sales behavior, or Oracle Sales should be personalized to simulate TeleSales behavior.

Table Mapping of Oracle TeleSales and Oracle Sales Profile Options, page G-3 provides a mapping of the profiles for Oracle TeleSales and Oracle Sales.

Table G-1 Mapping of Oracle TeleSales and Oracle Sales Profile Options

| Oracle TeleSales Profile | Oracle Sales Profile |
|--|--|
| OS: Forecast Sales Credit Type | ASN: Forecast Sales Credit Type |
| OS: Default Opportunity Win Probability | ASN: Default Opportunity Win Probability |
| OS: Default Opportunity Sales Channel | ASN: Default Opportunity Sales Channel |
| OS: Default Opportunity Status | ASN: Default Opportunity Status |
| OS: Default Close Date Days | ASN: Default Close Days Date |
| OS: Default Win/Loss Status | ASN: Default Win/Loss Status |
| OS: Default Status for Leads | ASN: Default Lead Status |
| OS: Opportunity Access Privilege | ASN: Opportunity Access Privilege |
| OS: Customer Access Privilege | ASN: Customer Access Privilege |
| OS: Sales Lead Access Privilege | ASN: Lead Access Privilege |
| OS: Manager Update Access | ASN: Manager Update Access |
| OS: Sales Admin Update Access | ASN: Sales Admin Update Access |
| OS: Default Value for Sales Team Keep Flag | ASN: Default Value for Sales Team Do Not Reassign Flag |

Setting Corresponding Oracle Sales and Oracle Trading Community Architecture

Oracle Sales and Oracle Trading Community Architecture each have separate sets of profile options that do not affect the other application. The profile OSO: Default Country maps to the profile ICX: Territory.

Setting Oracle TeleSales and Leads Profile Options

Additionally, some Oracle TeleSales and Leads profile options and lookups must be set

to enable interoperation with Oracle Sales. If you do not set these profiles as suggested, you cannot use TeleSales with Oracle Sales.

Table Oracle TeleSales and Leads Profile Options, page G-4 lists Oracle TeleSales and Leads profiles and their suggested values.

Table G-2 Oracle TeleSales and Leads Profile Options

| Profile | Value |
|--|--------------------------|
| OS: Assign New Lead | No |
| OS: Sales Methodology | Specify a valid value. |
| OS: Sales Lead Default Close Reason | Converted to Opportunity |
| OS: Default Opportunity Sales Stage | Specify a valid value. |
| OS: Lead Link Status | Converted to Opportunity |
| OS: Lead Incubation Channel | <LEAVE BLANK> |
| OS: Activate Sales Interoperability | Yes |
| OS: Lead to Opportunity Move Sales Team | Yes |
| OS: Opportunity Sales Credit Enforce Sales Team Definition | Yes |
| OS: Always Add Creator to Customer Sales Team | Yes |

Setting Oracle TeleSales and Oracle Sales Lookups

Table Oracle TeleSales and Oracle Sales Lookups, page G-5 lists the Oracle TeleSales lookups and their corresponding Oracle Sales values.

Table G-3 Oracle TeleSales and Oracle Sales Lookups

| Oracle TeleSales Lookup | Oracle Sales Lookup |
|--|---|
| CLOSE_REASON | ASN: Lead Close Reason ASN: Opportunity Close Reason |
| LEAD_CONTACT_ROLE, Opportunity Contact Rank | ASN: Contact Role Type |
| VEHICLE_RESPONSE_CODE | ASN: Vehicle Response Code |

Differences Between Oracle Sales and Oracle TeleSales

Oracle Sales and Oracle TeleSales provide separate Admin screens that enable administrators to set up each product, and there are additional differences between the two applications in the features and functionality available, as well as differences in the required setup for each. The following areas can require additional setup considerations.

- Sales Methodology, page G-6
- Converting Leads to Opportunities, page G-6
- Role and Address in Sales Team, page G-7
- Customer Sales Team, page G-7
- Rolling Forecast, page G-7
- Marketing Campaigns/Offer, page G-7
- Freeze Flag, page G-8
- Close Competitor and Comment, page G-8
- Customer Budget Status, page G-8
- End Customer and Address, page G-8
- Projects and Decision Time Frame, page G-8
- Accepting or Rejecting Leads, page G-8

- Concurrent Updates, page G-9
- Forecasting, page G-9
- Attachments, page G-9
- Incentive Compensation, page G-9
- Lead and Opportunity Currency, page G-9
- Account Plans and Strategic Information, page G-10

Sales Methodology

Oracle Sales enables users to designate whether sales methodologies and stages apply to leads, opportunities, or both, while in TeleSales, sales methodologies and stages apply only to opportunities. Therefore, Oracle TeleSales exposes only stages marked as applicable to Opportunities. Existing stages created, including those created through the TeleSales Admin user interface, are treated as applicable to Opportunities only.

Sales Coach

Oracle Sales introduces the use of a sales coach, which helps guide a user through a sales methodology stage. Oracle TeleSales does not use this functionality and continues to use Tasks tied to Sales Stages. Oracle Sales users can view the tasks created in Oracle TeleSales. When creating a sales methodology in Oracle TeleSales, the administrator should ensure that the Create tasks for all stages checkbox is not selected. If this checkbox is selected for a sales methodology whose stages use tasks, and the sales methodology is assigned to an opportunity from Oracle Sales, the tasks are not visible in Oracle TeleSales.

Sales Methodologies and Stages

In Oracle TeleSales, the stage is mandatory and the sales methodology is mandatory. In Oracle Sales, they are conditionally mandatory, and if the stage is specified, then the sales methodology becomes mandatory. If the methodology is specified, the sales stage becomes mandatory, only if there is an applicable sales stage. Therefore, Oracle TeleSales requires that at least one stage within each methodology is set up as applicable to an Opportunity.

Converting Leads to Opportunities

Oracle TeleSales enables any lead to be converted to an opportunity, regardless of status, while Oracle Sales enables only leads in open status to be converted. Oracle TeleSales enables multiple leads to be converted to the same opportunity by linking these leads to the opportunity, and also enables opportunities to be linked to one or more leads.

When a lead is converted to an opportunity in Oracle Sales, the status is always Converted To Opportunity. When a lead is converted to an opportunity in Oracle TeleSales, the status and close reason are determined by the profile options OS: Lead Link Status and OS: Sales Lead Default Close Reason. Therefore, when Oracle TeleSales and Oracle Sales are interoperating, these profile options should be set to Converted To Opportunity.

Sales Methodologies and Sales Coaches

If a lead is in a sales stage that is applicable to opportunity, Oracle Sales carries any information entered in the sales coach over to the opportunity. If the lead is converted through Oracle TeleSales, this information is not carried over. If there is no methodology or sales stage designated in the lead, the opportunity in Oracle Sales does not have a methodology or sales stage, whereas Oracle TeleSales uses the methodology and sales stage from the profile options OS: Sales Methodology and OS: Default Opportunity Sales Stage.

Sales Team

In Oracle Sales, the sales team for the lead is carried over to the opportunity, while in Oracle TeleSales, whether or not the sales team is carried over is governed by the profile option OS: Lead to Opportunity Move Sales Team. Therefore, when Oracle Telesales and Oracle Sales are interoperating, this profile option must be set to Yes.

Role and Address in Sales Team

In Oracle TeleSales, when assigning a resource to an opportunity sales team, the user can designate a role and address. Oracle Sales does not support roles and addresses. The sales team is viewable in Oracle Sales.

Customer Sales Team

Oracle Sales automatically adds the logged-in user to the customer sales team. For the logged-on user in Oracle TeleSales to be added to the customer sales team, you must set the profile OS: Always Add Creator to Customer Sales Team to Yes.

Rolling Forecast

Oracle Sales does not support the rolling forecast flag. Opportunities created in Oracle Sales do not have the rolling forecast flag set.

Marketing Campaigns/Offers

Oracle TeleSales enables users to specify marketing campaigns and offers at either the header and line levels, while Oracle Sales supports only header-level campaigns (not

offers). Additionally, in Oracle TeleSales there is a cross validation that ensures that the offer is associated with the selected campaign. If an opportunity with a header-level offer is accessed in Oracle Sales, and the campaign is changed, the offer might no longer be valid. To correct this problem, the user must update the opportunity in Oracle TeleSales.

Freeze Flag

In Oracle TeleSales, a user with update access can freeze an opportunity, so that it cannot be modified, while in Oracle Sales, a user cannot freeze an opportunity.

Close Competitor and Comment

Upon closing an opportunity in Oracle TeleSales, the user can enter a key/close competitor and close comment, while in Oracle Sales, this is not an option. For opportunities created in Oracle Sales, the key/close competitor and close comment fields are empty.

Customer Budget Status

In Oracle TeleSales, a user can specify customer budget status for a lead or opportunity. Oracle Sales does not support this information. These fields are blank for leads and opportunities created in Oracle Sales. Oracle Sales supports the budget amount for leads, but not for opportunities.

End Customer and Address

In Oracle TeleSales, a user can specify an end customer and address. Oracle Sales does not support this data. These fields are blank for opportunities created in Oracle Sales.

Projects and Decision Timeframe

In Oracle TeleSales, a user can associate a project to a lead or opportunity or associate a decision time frame with a lead. As Oracle Sales does not support this data, these fields are blank for leads or opportunities created in Oracle Sales.

Accepting or Rejecting Leads

Oracle TeleSales enables a user to accept or reject leads. This feature is not available in Oracle Sales.

Concurrent Updates

If an Oracle TeleSales user and Oracle Sales user are working on an opportunity at the same time, the application detects the change made by the other person and prevents overwriting. This behavior does not apply to leads, which can be overwritten.

Forecasting

When Oracle Sales is installed, the new Oracle Sales forecasting functionality replaces the existing functionality for Oracle TeleSales. Due to the difference in forecasting functionality between the earlier forecasting version and the new Oracle Sales forecasting, previously-saved product worksheets that have not yet been submitted are end-dated when the Oracle Sales patch is applied.

Attachments

In Oracle TeleSales, the user can append attachments to tasks, addresses, notes, and relationships. However, these attachments are not available in Oracle Sales. Only attachments for leads, opportunities, customers, and contacts that are added in Oracle TeleSales are accessible in Oracle Sales, since Oracle Sales supports attachments in these areas. However, if these attachments are added in any other category apart from the seeded Misc category, they will not be visible in Oracle Sales. Through personalization, you must make them available by adding the category to the Attachment table for the lead, opportunity, customer, or contact. Please refer the *Oracle Applications Framework Personalization Guide* for information on personalization.

Incentive Compensation

In Oracle Sales, the sales representative and sales manager can access only the commission statement and no other areas of the Oracle Incentive Compensation functionality. In Oracle TeleSales, the telesales agent can access other areas of incentive compensation as well, (for example, Planning, Income Planner, Compensation Plan, and Reports) in addition to the commission statement.

Lead and Opportunity Currency

Oracle Sales supports all valid FND currencies. Oracle TeleSales supports only the currencies defined in the Oracle TeleSales lookup type REPORTING_CURRENCY. When selecting values for the REPORTING_CURRENCY lookup, you should select all FND currencies that you are currently using for Oracle Sales.

Account Plans and Strategic Information

Account plans and strategic information are captured in Oracle Sales. However, this information is not available in Oracle TeleSales.

Customer and Contact Business Activities Plug-Ins

This appendix covers the following topics:

- Business Activities Plug-Ins for Customers and Contacts
- Overview of Business Activities Customization
- Define and Implement View Objects
- Define and Implement an Application Module
- Define the Plug-In Region
- Define and Implement the Controller
- Add a Lookup Code
- Define a FND Function

Business Activities Plug-Ins for Customers and Contacts

Oracle Sales enables consultants to provide customers with plug-ins to provide customized views of business activities for a customer or contact. The customized views must not contain any updateable items or columns. If a region is defined and implemented as described in this appendix, then a plug-in to display customized business activities can be added.

Business activities are accessible through the Business Activities selection drop down on the Customer and Contact details pages. Applicable activities are listed in the Business Activities selection drop down. By default, these business activities are provided:

- Open Opportunities
- Open Leads
- Proposals Received

- Quotes Received
- Recent Orders and Returns
- Campaigns
- Service Request Backlog
- Sales Contracts
- Sales Agreements
- Service Contracts

Overview of Business Activities Customization

The framework of the business activities table is referred to in these steps as the business activities container. The table itself is referred to as the plug-in region. The content of the table is what you are defining and plugging in.

This is an overview of the steps to create an OA-based Business Activities plug-in:

Steps

1. Define and implement view objects that get the results to display in the plug-in region. Also, define a Simplest Possible Expression Language (SPEL) property view object, which is used to dynamically render on and off the plug-in region.
2. Define and implement the application module to contain the defined view objects.
3. Define the plug-in region, which contains the results table.
4. Define and implement the controller and associate it with the plug-in region.
5. Add a lookup code to the business activities lookup type.
6. Define a FND function.

Define and Implement View Objects

You must define and implement view object(s) to get the results to display in the plug-in region. Business activities are displayed in both customer and contact details, so the associated view object of the plug-in region must be able to support both areas. The plug-in region's results table is associated with the view object dynamically based on whether the business activities container is displayed in the customer or contact details pages.

While defining a view object, you must provide corresponding transient attributes for

each amount and date field attribute. This can be used to show the amount or date column in the user's preferred Currency/Date format. This also requires a change in the getter method for the transient attribute in the VORowImpl class.

Also, you must define a SPEL property view object, which is used to dynamically render on and off the plug-in region.

After defining required view objects, you must associate them to the application module and the plug-in region. The following subsections list the steps to define required view objects.

Customer View Object - SQL Based

To define this view object:

Steps

1. Define the view object business component with SQL statement.
The SQL statement should have Filter on Customer ID as the bind parameter.
2. Verify that the view attribute mappings are accurate.
3. Generate the view object and view row implementation classes.
4. In the View Implementation class, implement a method to run the view object query for the given customer ID.

Contact View Object - SQL Based

To define this view object:

Steps

1. Define the view object business component with SQL statement.
The SQL statement should have Filter on the Contact ID and/or the Customer ID as the bind parameter.
2. Verify that the view attribute mappings are accurate.
3. Generate the view object and view row implementation classes.
4. In the View Implementation class, implement a method to run the view object query for the given customer ID and contact ID.

SPEL Property View Object - Transient

To define this view object:

Steps

1. Define the view object business component with a transient attribute of type

Boolean.

This attribute is used to render on and off the plug-in region.

2. Verify that the view attribute mappings are accurate.
3. Generate the view row implementation class.

Define and Implement an Application Module

A business activities plug-in region must have its own application module. Define an application module and associate it to the plug-in region.

These are the functions of the application module:

Steps

1. Initialize the SPEL properties view object.
2. Initialize the view object query to fetch the results.
3. Reset/Clear the view object associated with the table (results) region.

To implement an application module for a plug-in region:

1. Define an application module business component.
2. Associate the view object business components you have created to the new application module.
3. Generate the application module implementation class. The implementation class must have these characteristics:
 - Implement a method that sets the Boolean attribute of the SPEL view object to TRUE or FALSE conditionally. Note that this view object must always have one row in it, and the Boolean attribute must be initialized to TRUE or FALSE.
 - Implement a method that executes the appropriate view object (customer and contact) for a given customer ID and contact ID. Note that the contact ID is available only if the base page is the contact detail page.
 - Implement a method named *resetQuery()*, that marks the view objects (customer and contact) as not prepared or not ready for execution by invoking the *setPreparedForExecution(false)* method on them.

Define the Plug-In Region

A business activities plug-in region must be defined as a stand alone region with a stack

layout. The results table region is included by the stack layout region. It is recommended to prefix the region and item names with the corresponding product code of the plug-in region. The rendered property of the table region must be SPEL bound, so that it can be rendered on and off dynamically.

This plug-in region performs the function of List/Retrieve the data associated with a customer or customer and contact combination when a user selects this region from the business activities selection drop-down menu.

The following subsections describe how to define this plug-in region.

Plug-In Region

To define the plug-in region:

Steps

1. Define a region of the type *stackLayout*.
2. Associate the region to the application module.
3. Using the *stackLayout* region, define a region of the type Table.
4. Set the rendered property of the table region using the SPEL syntax. The value is derived at run time from the Boolean attribute of the defined SPEL view object.
5. Set the records displayed property of the table region to 5.
6. Associate each column and item to the appropriate attribute of the view object (customer and contact).
7. Any columns and items of the table that perform a form action (for example, a hyperlink or a button), which enables the user to navigate out of the base page, should always throw a fire action parameter named *ASNReqExitPage* with the value of Y. This parameter is used by the base page to handle actions like implicit save before the user navigates out of the base page.

Note that the plug-in region is not expected to have any updateable items or columns.

Input Parameters - Plug-in Region

Table Input Parameters for the Plug-in Region, page H-6 lists the input parameters for the plug-in region.

The parameter type is String for each input parameter.

Table H-1 Input Parameters for the Plug-In Region

| Parameter Names | Scope | Description | Required | Possible Values |
|------------------------|--------------|---|-----------------|------------------------------|
| ASNTxnCustomerId | Transaction | Customer Party ID. Base page populates this parameter and stores it in the transaction. | Yes | Customer Party ID |
| ASNTxnRelPtyId | Transaction | Relationship Party ID. Base page populates this parameter and stores it in the transaction. This value is available only if the base page is the Contact details page. | | Relationship Party ID |
| ASNBusActsPoplist | Page Context | The popup value selected from the business activities selection drop down. The business activities container passes this value to the underlying plug-in regions. The value for this parameter can be obtained from the page context. | Yes | Plug-in region's lookup code |
| EVENT_PARAM | Page Context | Name of the PPR event raised by the business activities selection drop down menu. The value can be obtained from the page context. | | ASNBUSACT SPPR |

| Parameter Names | Scope | Description | Required | Possible Values |
|----------------------|-------------|--|----------|---|
| ASNTxnAddBrdCrm b | Transaction | Base page sets this breadcrumb parameter in the transaction, which will be used during the page navigation from the business activities plug-in region. If no value is passed, then it should be defaulted as ADD_BREAD_CRUMB_YES. | | ADD_BREAD_CRUMB_YES ADD_BREAD_CRUMB_NO ADD_BREAD_CRUMB_SAVE |
| ASNTxnReturnUrl | Transaction | Base page populates this parameter and stores it in the transaction. This can be used by the page navigation from the business activities plug-in region. | Yes | The URL string that is sufficient to navigate back to the base page. |

Output Parameters - Plug-in Region

Table Input Parameters for the Plug-In Region, page H-8 lists the output parameters for the plug-in region.

The parameter type is String for each output parameter.

Table H-2 Input Parameters for the Plug-In Region

| Parameter Names | Scope | Description | Required | Possible Values |
|------------------------|--------------|---|-----------------|------------------------|
| ASNReqExitPage | Page Content | All component regions that are embedded in (plugged into) the customer and contact business activities container are presumed to be read-only. Any columns and items of the table that perform a form action (for example, a hyperlink or a button), which enables the user to navigate out of the base page, should always throw a fire action parameter named <i>ASNReqExitPage</i> with the value of Y to indicate that the user is leaving a current page. The base page can use this parameter to handle events like implicit commit before the user navigates out of the base page. | Optional | Y or N. Default is N. |

Define and Implement the Controller

Define a controller and associate it with the defined plug-in region.

These are the functions of the controller:

Steps

1. Associate the table region with the appropriate view object depending on whether the results are to be fetched for customer or contact.
2. Initialize the view object (customer or contact) query.
3. Initialize the SPEL property view object.

Plug-In Region Controller

To define and implement the controller:

Steps

1. Define a controller webui component class
2. In the *processRequest()* of the controller class:
 - Get the customer ID from the transaction parameter *ASNTxnCustomerId*.
 - Get the contact ID from the transaction parameter *ASNTxnRelPtyId*.
 - Get the business activities plug-in selection value from page context parameter *ASNBusActsPoplist*.
 - Set the view usage name of the table region and its child items and columns to an appropriate view usage name. Customer based view object usage name should be used if only customer ID is available. Contact based view object usage name should be used if both contact and customer IDs are available.
 - Based on the business activities plug-in selection value, set the SPEL view row Boolean attribute to either Boolean.TRUE or Boolean.FALSE. This ensures that the plug-in region is rendered only if it is selected from the selection drop down menu.
 - Run the appropriate view object (customer/contact) query for customer ID or customer ID and contact ID combination.
3. In the process *FormRequest()* of the controller class:
 - Get the customer ID from the transaction parameter *ASNTxnCustomerId*.

- Get the contact ID from the transaction parameter *ASNTxnRelPtyId*.
 - Get the business activities plug-in selection value from page context parameter *ASNBusActsPoplist*.
 - Get the form action event from page context parameter *OAWebBeanConstants.EVENT_PARAM* .
 - If the form action event is that of business activities plug-in selection drop-down event *ASNBUSACTSPPR*, then:
 - Based on the business activities plug-in selection value, set the SPEL view row Boolean attribute to either Boolean.TRUE or Boolean.FALSE. This ensures that the plug-in region is rendered only if it is selected from the selection drop-down
 - Run the appropriate view object (customer/contact) query for customer ID or customer ID and contact ID combination.
4. Associate this controller to the plug-in region.

Add a Lookup Code

In order for a new plug-in region to appear in the business activities selection drop down menu, a new look up code must be added to the business activities lookup type. The default lookup type used by the business activities selection drop down is *ASN_BUSINESS_ACTS*.

It is recommended to prefix the new lookup code with the product code.

To add a lookup code:

Steps

1. Add a lookup code to the lookup of type *ASN_BUSINESS_ACTS*.
2. Set the meaning, tag, and enabled flag attributes of the lookup code.
3. In the Description field, provide the full path to the VO package of the corresponding table region.

Define a FND Function

To load the plug-in region information at runtime, the business activities container must have access to the plug-in region metadata. Define a new FND function with the same name as that of lookup code and with the Web HTML value as the full package path of the plug-in region.

To define a FND function:

Steps

1. Define a FND function with the same name as that of defined lookup code.
2. Set the Web HTML Call attribute of the function to full mds package path of plug-in region.

For example, /.../.../.../webui/<plug-in region name>. Note that there should not be any errors raised by the plug-in region controller while handling the exit page navigation events.

Oracle Sales Frequently Asked Questions

This appendix covers the following topics:

- Why does a search for lead or opportunity with particular owner produce unexpected results?
- How can I see the Trading Community Architecture log messages logged in the customer module?
- Why does a newly created customer not show in customer search?
- Why do customer search results show customers that do not match the search criteria?
- How can I hide entries in the Customer Classification list of values?
- Why can't I see the personalization page for Configurable UI in the Sales Dashboard?
- Why are some of my personalizations gone after I upgrade?
- How do I enable the Additional Information tab?
- How do I show Sales Funnel at the bottom of the Sales Dashboard page?
- How do I download personalizations?
- How can I define a default subtab?
- Why do I get a "You do not have Permission to access this functionality" error when clicking on a hyperlink?
- Can I set up a sales representative without any sales group in TAP?
- Why am I getting a java null pointer exception when attempting to access the Sales Dashboard through Sales User?
- Is there a way to prevent a user from creating a Quote on a closed Opportunity, or on an Opportunity whose close date is past due?
- The profile option OS: Sales Methodology will not default Sales Methodology to a new Opportunity. Is this correct?

- Does Oracle Sales support the addition of a Sales Member of a Customer Sales Team to either an Opportunity or Lead?
- Why can sales representatives view opportunities for which they are not part of the Sales Team?
- Why are Opportunity Products not carried over to a Quote?
- Can I disable a Lead Rank?
- How do you enable the View History Button on the Opportunity Details Page?
- How do you set up Forecasting in Oracle Sales?
- Should Advanced Search work when using Classification as the only search criteria?
- Why does the Relationship Roles dropdown in the Customer Advanced Search display types that have been disabled?
- How do you assign an External Sales Team to a Customer in Oracle Sales?
- Why can't a Sales Manager see a subordinate's Leads or Opportunities, despite the profile ASN: Manager Update Access set to Update?
- Can a Customer use Oracle Sales without Oracle Inventory if they are a Customer that sells Services rather than Products?
- What prerequisite steps are required to generate Sales Campaigns?
- How can I personalize the Shortcuts Bin?
- How can I add a link to the Shortcuts Bin?
- Why is the Top Customer Bin empty?
- How can I enable the Personalization Page link?
- How can I turn On/Off the Personalization Links that are visible within Oracle Sales?
- How can I disable the hyperlink of Opportunity and Customer in the Opportunity Page?
- How do I create and display additional Category Attachments?
- Can I run Oracle Sales (ASN) and Oracle Sales Online or Oracle Field Sales (ASF) together?
- Can I run Oracle Sales (ASN) and Oracle TeleSales together?
- How can I enable Diagnostics in Oracle Sales?
- Why is the match any/all option missing in customer/contact advanced search?
- Why can't I change the Party Name anymore?
- The Sales Coach and Account Plan report were generated in an Unknown format. How do I solve this?

- Why does the Account Plan Report show only ten records when there are more than ten records available in the table/bin?
- Why don't new period types appear in the Calendar?

Why does a search for lead or opportunity with particular owner produce unexpected results?

On Leads and Opportunities view pages, the leads and opportunities matching the search criteria and that the user can access are listed. Also, only the leads and opportunities for which the user is on the sales team are listed on the Sales Dashboard page. This restriction is used to avoid the potential performance issues that could result if the user is granted full access to leads and opportunities.

For users who are granted Sales Team access, the search results on Sales Dashboard are the same as the ones on Leads and Opportunities view pages. There is no issue in this case.

An issue can occur if users who are granted Full Access use the Sales Dashboard as a sales representative. Oracle Sales treats users who have Full Access like a super user. In most cases, a super user would not be on the sales team, so they might not get the expected search results.

Instead of these users accessing the Sales Dashboard page as a sales representative, you should create custom responsibility to enable these users to access Leads, Opportunities, Customers and Forecasting pages directly. This is similar to the capability granted by the Sales Manager DBI responsibility.

How can I see the Trading Community Architecture log messages logged in the customer module?

Oracle Sales uses TCA (or HZ) CPUI components, and uses common FND logging to log messages. But TCA currently does not have Oracle Applications logging, but instead uses BC4J logging.

To enable BC4J logging for TCA:

Add the following to the jserv.properties under ../Apache/Jserv/etc:

```
wrapper.bin.parameters=-Djbo.logging.trace.threshold=6
wrapper.bin.parameters=-Djbo.debugoutput=console
# Enable/disable Apache JServ logging.
# WARNING: Logging is a very expensive operation in terms of
performance.
# You should reduced the generated log to a minimum or even disable it
if
# fast execution is an issue. Note that if all log channels (see below)
# are enabled, the log may become quite large since each servlet request

# may generate many Kb of log. Some log channels are mainly for
debugging
# purposes and should be disabled in a production environment.
# Syntax: log=[true,false] (boolean)
# Default: true
log=true
```

The log message output will be available under `../Apache/Jserv/logs/jserv.log`

Why does a newly created customer not show in customer search?

Trading Community Architecture's (TCA) Data Quality Management (DQM) feature searches for customer information against TCA staging tables. When a customer is created, the new information is staged based on the DQM synchronization setup done in TCA. Please refer to the *Oracle Trading Community Architecture Administration Guide* for more information on setting up DQM synchronization.

Why do customer search results show customers that do not match the search criteria?

When performing customer search on address fields, the customers returned are the ones that have an address matching the search criteria or that the contact's address match the search criteria. This is the TCA DQM search functionality.

Also note that the address displayed in the search results table is the primary address of the customer and not the address on which you searched.

How can I hide entries in the Customer Classification list of values?

You can log in using the Trading Community Manager responsibility to setup and manage Classification Categories and Codes and hide created values. You cannot hide the values provided with Oracle Sales. See the *Oracle Trading Community Architecture Administration Guide* for details.

Why can't I see the personalization page for Configurable UI in the Sales Dashboard?

The personalization for Configurable UI is supported only if Accessibility is set to None

for the user. Otherwise, the standard personalization page with the H-Grid form is displayed.

Why are some of my personalizations gone after I upgrade?

In the current release, all the sales pages have been changed to use a flexible layout, which enable you to easily configure the page layout. Due to this change, some of your personalizations performed at the page level (e.g. region re-ordering) may be gone after upgrading as Oracle Applications Framework cannot apply these personalizations.

How do I enable the Additional Information tab?

The additional information tab is hidden by default and can be enabled through personalization.

To enable the Addition Information tab, set the Rendered option to True in these two locations:

Sub Tab Layout: Update Lead --> Stack Layout: Additional Information

Sub Tab Layout: Update Lead --> subTabs --> Link: Additional Information

To enable the Additional Information tab:

1. On the personalization page for LeadDetPG, click **Complete View**.
2. Click Sub tab Layout: Sub tabs.
3. Scroll down to the stack layout to Stack Layout: Additional Information; click the personalize icon (pencil icon).
4. Set the Rendered property to True.
5. Click **Apply**.
6. Verify the setting under the Subtabs > Subtab bar by clicking the personalize link for Additional Information. The Rendered property should be set to True.
7. Return to Oracle Sales and verify that you can access the Additional Information tab.

How do I show Sales Funnel at the bottom of the Sales Dashboard page?

To position the Sales Funnel at the bottom of the Sales Dashboard page:

1. Click the Personalize Page link .
2. Select the Personalization Level as Site: Site and click **Go**.

3. Click the Contents tab.
4. Remove the Sales Funnel content. Retain it to reposition it in next step
5. Add the Sales Funnel content to the layout that contains Leads and Opportunities contents. Add the Sales Funnel to the end. You can also change the order of the contents if needed.

How do I download personalizations?

To download personalizations:

1. Set the value of the profile option FND: Personalization Document Root Path to a file location. This location is where the downloaded personalized documents are stored. For example, if the value is set to: /home/usr/john/test/download, the downloaded document is stored at
/home/usr/john/test/download/oracle/apps/asn/.../.../
2. Log in using the Functional Administrator responsibility.
3. Click the Personalization tab.
4. Click the Import/Export subtab.
5. In the Personalization Repository page, enter the Application as Sales.
6. Enter the Document Path as /oracle/apps/asn/ and click **Go**.
7. All personalized documents in Oracle Sales (ASN) are listed.
8. Select the documents to download and click **Export to File System**.
9. Go to file location (for example, /home/usr/john/test/download) and verify that the personalizations are downloaded.

How can I define a default subtab?

This is how to define a default subtab (making a selected subtab the first one your user will see) using Contacts as an example.

Follow these steps to make the Contacts tab as the first tab shown on the Update Opportunity page:

1. Go to the Update Opportunity Page and click the Personalization Global icon.
2. Expand the H-Grid tree as follows:

Page Layout: Update Opportunity

----Sub Tab Layout: Sub Tabs

-----subTabs

--Sub Tab Bar: (ASNOpptyDetSubtabBar)

3. On the Sub Tab Layout: (Sub Tabs) item, click the ReOrder icon.
4. Select the Personalization Level check box.
5. Rearrange the subtab layouts by moving the Contacts item to be the first item on the list.
6. Click **Apply**.
7. On the Sub Tab Bar: (ASNOpptyDetSubtabBar) item click the ReOrder icon.
8. Select the Personalization Level check box.
9. Rearrange the subtab links by moving the "Contacts" item to be the first item on the list.
10. Click **Apply** and go back to the application page.

Note: User selected subtab has preference over default subtab. User selected subtab is remembered by OA Framework for the duration of the login session.

Why do I get a "You do not have Permission to access this functionality" error when clicking on a hyperlink?

The error message also says to contact your system administrator to grant access to the responsibility you are using. This error occurs when the function security is enabled at the destination page, but the corresponding page function is not included as part of responsibility menu or is excluded from the responsibility menu. When this happens, first verify if there are any menus or functions that have been excluded under the given responsibility.

Then check Oracle Sales Implementation Guide for menu setup details. If the problem still exists, log a bug with the following information:

1. Responsibility menu details.
2. Exclusions for the given responsibility.

3. The page your user was attempting to access.

Can I set up a sales representative without any sales group in TAP?

Do not set up a resource without a sales group in TAP. If a sales representative without a sales group is assigned using TAP, TAP inserts the sales representative with a Null sales group. Be sure to set up TAP so that it does not encounter resources without sales groups.

Why am I getting a java null pointer exception when attempting to access the Sales Dashboard through Sales User?

Verify that the profile option Server Timezone (SERVER_TIMEZONE_ID) is set.

Is there a way to prevent a user from creating a Quote on a closed Opportunity, or on an Opportunity whose close date is past due?

No, this is intended functionality.

The profile option OS: Sales Methodology will not default Sales Methodology to a new Opportunity. Is this correct?

This is intended functionality. Oracle Sales does not default the Sales Methodology using a profile option. The profile OS: Sales Methodology is used only by Oracle TeleSales and during the auto-conversion of a Lead to an Opportunity. Customers can personalize the Create Opportunity Page to have the user interface default to the desired Sales Methodology. Do this by personalizing the item Message Choice: Methodology. Set the property Initial Value to the value of the sales_methodology_id that the user wants to use as the default. This can be retrieved by selecting the sales_methodology_id from as_sales_methodology_tl.

Does Oracle Sales support the addition of a Sales Member of a Customer Sales Team to either an Opportunity or Lead?

This functionality does not exist currently.

Why can sales representatives view opportunities for which they are not part of the Sales Team?

This is intended functionality. Even though sales representatives can view these opportunities, they cannot update them. Oracle Sales performs access checks only when

a user tries to access an opportunity to update. The Recent Opportunities and Business Activities Open Opportunities bins will show all Opportunities regardless of the Sales Team Access type of the logged in user.

Why are Opportunity Products not carried over to a Quote?

If Oracle Sales and Oracle Quoting have different Product Categories, then the line items in Oracle Sales will not be carried over to Oracle Quoting.

Note: Oracle Quoting can leverage the same Product Catalog setup as Oracle Sales by setting up a profile option. See the *Oracle Quoting Implementation Guide* for details.

Can I disable a Lead Rank?

If you attempt to disable a Lead Rank, you receive this error message:

Ratings used by Sales Leads or Profile settings or Rules cannot be disabled or deleted.

This is to protect data integrity. If a ranking is being referred to in the profile option, Rules or Leads, it should not be disabled. You can, however, delete or disable a seeded rating if it is not being used.

Note: Leads become read-only after they are converted to an Opportunity. This is expected functionality.

How do you enable the View History Button on the Opportunity Details Page?

To enable the View History button:

1. Log into Oracle Sales and navigate to the Sales Opportunity Details Page (OpptyDetPG).
2. Select the Personalize Page link. This navigates to the Personalize Page for the Sales Opportunity Details Page.
3. Click Complete View.
4. Navigate to the Page Button Bar: Page Buttons > Submit Button: View History.
5. Click the Personalize pencil icon and set the value for Rendered to True.

The View History button should be available in the right corner on the Opportunity details page.

How do you set up Forecasting in Oracle Sales?

To set up forecasting in Oracle Sales:

1. Set the following profile options:
 - ASN: Forecast Calendar
 - ASN: Forecast Calendar Month
 - ASN: Forecast Sales Credit Type
 - ASN: Default Forecast Period Type
 - ASN: Default Forecast Category
 - ASN: Default Value for Minimum Number of Opportunities Displayed for Forecasting Purposes
2. Create Forecast Categories. Using the responsibility Sales Administrator, navigate to Administration > Sales > Forecast Category.
 - Note:** The middle-tier of the Applications Server must be stopped and restarted before the next step.
3. Map Product Categories to Forecast Categories. Using the responsibility Sales Administrator, navigate to Administration > Sales > Forecast Category Mapping.
4. Setup Currency Conversion Rates.
5. Run the Concurrent Programs AS_PERIOD_DAYS and AS_PERIOD_RATES.

Note: There should be only one active Manager per Sales Group. If this is not the case, then the sales managers will see the same Opportunity multiple times in the Opportunity Detail section, instead of just once.

Should Advanced Search work when using Classification as the only search criteria?

Customer Search within Oracle Sales is implemented using DQM (Data Quality Management). The DQM search expects at least one search criteria which is defined as an acquisition attribute in the match rule for the search being conducted. In the case described earlier, Classification is not actually part of the match rule, it is simply an additional search criteria that appears on the Advanced Search in addition to the search attributes defined in the Customer Advanced Search match rule. Thus, the advanced search will not work if you use Classification as the only search criteria. Refer to the

DQM section of the *Oracle Trading Community Architecture Administration Guide* for information on setting up match rules.

Why does the Relationship Roles dropdown in the Customer Advanced Search display types that have been disabled?

The Relationship Role dropdown in the Customer Advanced Search will contain all the organization to organization and organization to person relationship roles and is not filtered by relationship group.

How do you assign an External Sales Team to a Customer in Oracle Sales?

Support of External Sales Teams is available through Sales and Partner integration. This feature is disabled by default. To implement this feature, refer to the steps documented in the *Oracle Sales Implementation Guide* and the *Oracle Partner Management Implementation Guide*.

Why can't a Sales Manager see a subordinate's Leads or Opportunities, despite the profile ASN: Manager Update Access set to Update?

For a sales manager to be able to view or update a subordinate's data, the sales manager must log into Oracle Sales using the Sales Manager responsibility. If the sales manager logs in using the Sales User responsibility, then they will have the same access as a sales representative and will not be able to view or update a subordinate's data. For details, refer to Setting Up Manager Roles, page 4-6 in this guide.

Can a Customer use Oracle Sales without Oracle Inventory if they are a Customer that sells Services rather than Products?

Services can be defined as a Product in Oracle Inventory. Oracle Sales does enable users to add Products with type of Service to an Opportunity or Lead. Customers must implement Product Category Hierarchy to add Product Categories and Inventory Items in Oracle Sales. Inventory set up is not required if customers only want to implement Product Categories. Refer to Note 337319.1 for additional information.

What prerequisite steps are required to generate Sales Campaigns?

To generate sales campaigns:

1. Create a Campaign in Oracle Marketing. This step is mandatory. A Rollup Campaign is the Marketing effort that the Sales Campaign will roll up to.
2. Optionally, create a List Template in the Audience Workbench. You do not have to

perform this step if you choose to use a provided template.

To create a new list template, do the following:

1. Enter a query template name.
 2. Select the first filter attribute through the attribute LOV.
 3. Select one or more operators (for example: Is, Is Not, Like) using the Operator LOV.
 4. Select one of the operators chosen in the previous step as the operator default for the attribute.
 5. Enter a value and value display for the line and indicate if the attribute must be included when a Sales Campaign is created from the template.
 6. Click **Add more rows** to add additional attributes to the template.
 7. Click **Finish** when you have completed your template.
3. Create a Schedule Template in the Campaign Workbench. This step is mandatory. Sales Campaigns created in Oracle Sales use only the 'Sales' activity type schedule templates. A schedule template provides a framework that includes predefined values and specifications for commonly used schedule attributes, such as the list template and approval requirements for the Sales Campaign.
 4. Create Proposal Templates and other content. This step is optional. Any proposal template or other content for the Campaign must be set up through Oracle Proposals and Oracle Content Manager.

How can I personalize the Shortcuts Bin?

To personalize the Shortcuts on the Sales Dashboard:

1. Set the profiles Personalize Self-Service Defn to Yes, and Disable Self-Service Personal to No.
2. Navigate to the Personalize page. On this page select the Personalize Properties pencil icon above Shortcuts (right side of the screen). This will take you to the Personalize Page hierarchy for Sales Dashboard (DashboardPG).
3. Navigate to Flexible Content: Shortcuts > Content Container: Shortcuts > Bulleted List: Shortcut List. Expand to see the list of available links available for display. There is a column which advises whether or not the link is shown. For example, if the Leads is blank and you want it displayed, click the Personalize pencil. Check to see what the property for Rendered is (usually set to inherit or false).

4. Change this value to True at the Responsibility Level and hit the Apply button. Navigate to the Sales Dashboard and the Leads link should now be visible in the Shortcuts.

How can I add a link to the Shortcuts Bin?

You can add a link to the Shortcuts on the Sales Dashboard through OA Personalization.

1. Set the Personalize Self-Service Defn profile to Yes, and the Disable Self-Service Personal profile to No.
2. Navigate to the Personalize page hierarchy for the Sales Dashboard with personalization at the 'Site' level.
3. Navigate to Bulleted List: Shortcut List and click the Create Item icon.
4. After choosing Item Style as Static Styled Text, enter the other required information like ID, Prompt, Destination URL.
5. Click **Apply**.

The link is now visible in the list of Shortcuts.

For more information about adding or creating items to a page or a region, refer the *Oracle Applications Framework Personalization Guide*.

Why is the Top Customer Bin empty?

The Top Customer bin uses the Service Contracts and Supply Chain DBI Materialized View. This bin is disabled by default and you can enable it using personalization.

How can I enable the Personalization Page link?

Set the value for the profile option Personalize Self-Service Defn to Yes and Disable Self-Service Personal profile to No.

How can I turn On/Off the Personalization Links that are visible within Oracle Sales?

Set the profile option FND: Personalization Region Link Enabled. Setting to Yes will display the various hyperlinks displayed within Oracle Sales. Setting to No will remove these links.

How can I disable the hyperlink of Opportunity and Customer in the Opportunity Page?

To disable the Opportunity and Customer hyperlinks:

1. Hide the Customer link.
2. In the personalization page for Update Opportunity, use: 'Create Item' in the appropriate region. Create an item of type 'MessageStyleText' and specify PartyName and OpportunityDetailsVO1 as View Attribute and View Instance respectively.

How do I create and display additional Category Attachments?

Refer to Note 337957.1 for information.

Can I run Oracle Sales (ASN) and Oracle Sales Online or Oracle Field Sales (ASF) together?

No, refer to Note 293049.1 for further information.

Can I run Oracle Sales (ASN) and Oracle TeleSales together?

Yes, however Oracle Sales does not use all of the same profile options as Oracle TeleSales. For Oracle TeleSales profile options to have an effect within Oracle Sales and for both products to have the same behavior, there are certain profile options which you must set for both Oracle Sales and Oracle TeleSales.

Refer to the Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options, page G-2 section and the *Oracle TeleSales Implementation Guide* for details.

How can I enable Diagnostics in Oracle Sales?

Set the profile option FND: Diagnostics to Yes to enable logging. If set to Yes, a Diagnostics Global button will be rendered on every page (top right hand corner). Users can select this button to view the log messages for the page, with the Log Viewer screen. Database trace is also available when this profile is set to Yes.

The profile option FND: Debug Log Filename will determine the filename for the Middle-Tier messages. If this profile is not set, Middle-Tier messages will be logged to the Database. Server PL/SQL ignores this value, and logs to the Database only.

If the logging is turned on, the AOLJ opens a separate database connection to call the PL/SQL Logging APIs to write the log messages to the database. If the profile FND:

Debug Log Filename is set, no database connection is used to perform the logging.

Note: Running Diagnostics can impact application performance.

Why is the match any/all option missing in customer/contact advanced search?

The radio buttons to choose match any/all are not available anymore. However, you can configure an appropriate match rule to do a match any or all.

Why can't I change the Party Name anymore?

The HZ: Change Party Name profile determines the update behavior of Organization and Person names. When this profile is set to No, you will not be able to update the party name.

The Sales Coach and Account Plan report were generated in an Unknown format. How do I solve this?

The ASN: Default Sales Document Type profile must be set to an appropriate value. You can also use the Sales Default Preferences page to set the default Sales Document Type.

Why does the Account Plan Report show only ten records when there are more than ten records available in the table/bin?

The seeded ACCTPLAN.rtf template is restricted to display only ten records due to performance constraints.

This restriction can be relaxed by following the steps below. However, performance considerations should be taken into account before making the changes.

1. Log in into Oracle Applications with XML Publisher Administrator responsibility.
2. Navigate to the Templates page, enter ACCTPLAN (case sensitive) in the Code field and click **Go**.
3. From the search results, click the Account Plan Worksheet link to view the details of the template.
4. Under Translatable Template region, click the Download icon to download the ACCTPLAN.rtf file.

5. Open the downloaded file and go to the section of the bin for which you want to change the number of rows.
6. Right click in the first data row and select Properties from the list of options.
7. In the Text Form Field Options dialog box, click **Add Help Text**.
8. In the Form Field Help Text dialog box, verify the code displayed in the 'Type your own' text area. This is a sample of the code that you can see:


```
<?for-each:ASNacctPlanBusinessDriversVORow[position()<11]?><?Name?>
```
9. To increase the number of rows to be displayed in the report to 50, replace the number in [position()<11] to [position()<51].
To display all available rows, remove [position()<11] from the code.
10. Click **OK** to save the changes and close the Form Field Help Text dialog box.
11. Click **OK** to close the Text Form Field Options dialog box.
12. Save the template file.
13. In the View Template: Account Plan Worksheet page in the application, click the Update icon from the Translatable Template region.
14. In the Update File page, click **Browse** to upload the modified template file.
15. Click **Apply** to replace the seeded ACCTPLAN.rtf template with the modified template.

Why don't new period types appear in the Calendar?

When a sales user adds a new period type to a calendar in General Ledger Super User responsibility, the new period type does not automatically show as a valid period type mapped to the calendar in the Sales Admin UI. The user must map the period type to the calendar manually in the Sales Admin UI. After the mapping, the user must run the following concurrent programs in order to get the rates for the new period type.

- Refresh AS_PERIOD_DAYS table
- Refresh Multi-Currency Conversion Rate (AS_PERIOD_RATES)